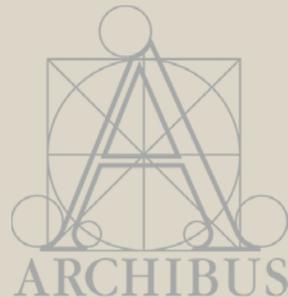


# ANNUAL SPACE SURVEY – 2020

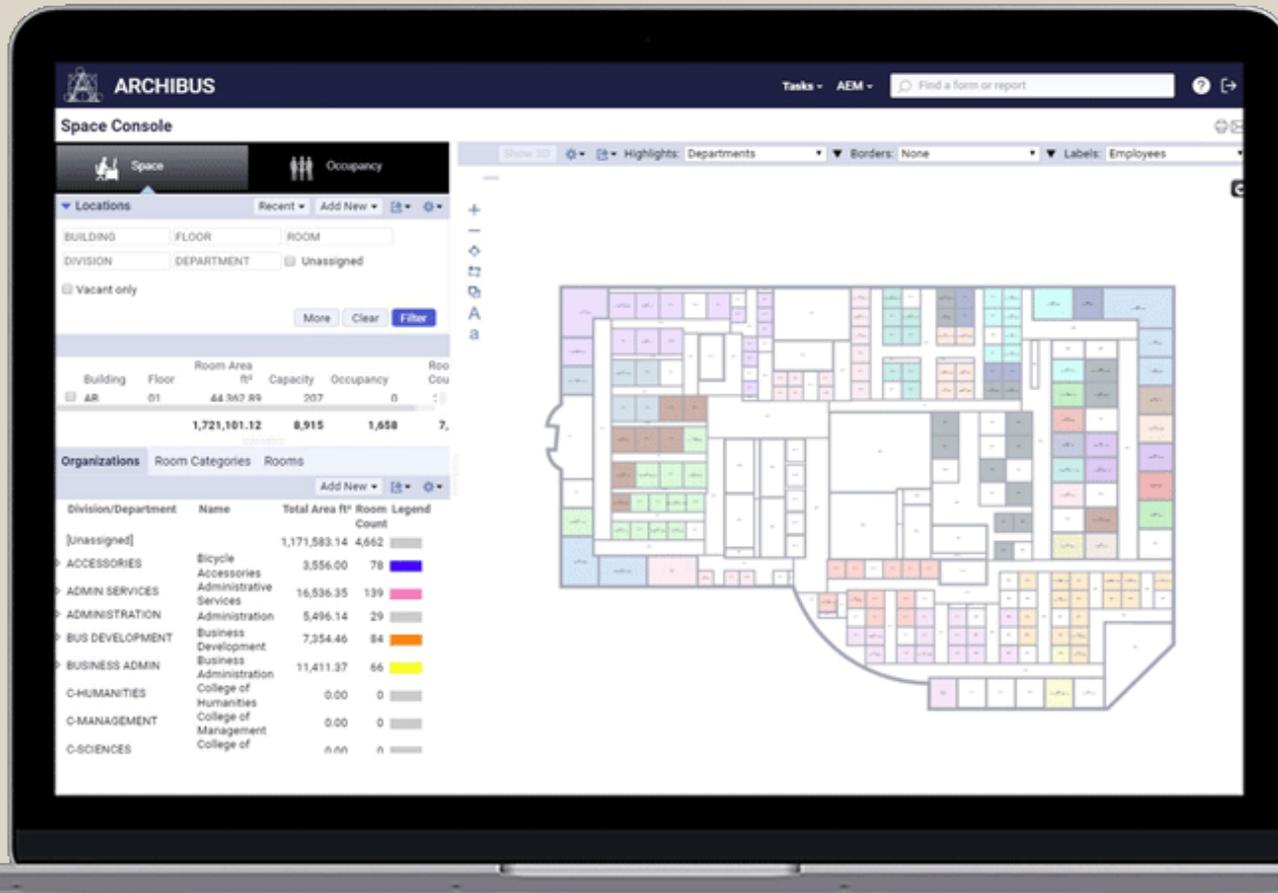
**UCSF**

University of California  
San Francisco  
*advancing health worldwide*



**Kick-Off & Town Hall**  
**August 26<sup>th</sup> 2020**

# WELCOME



# AGENDA

## 1. **Space Survey Overview**

- Welcome – Introductions
- Survey Timeline
- Space Update Form
- F&A Survey Update
- System Updates

## 2. **Importance of Accurate Data**

- PI Assignment Pending Space (Tracy Dudman)

## 3. **Space Survey Support**

## 4. **Q & A**

# ARCHIBUS ADMINISTRATORS

- UCSF Real Estate is the campus resource for all Campus Archibus Users.
  - System Access
  - System Training
- How to reach us  
[archibus-support@ucsf.edu](mailto:archibus-support@ucsf.edu)



Phone:

- Craig Culver: 415-476-4429
- Lisa (Lettau) Rolfsness: 415-502-6446 / 510-323-6782

# ANNUAL SPACE SURVEY

The Space Survey is a process that is conducted annually to enable staff to provide an accurate accounting of UCSF Space and Occupancy data during a designated time period.

- UCSF Real Estate coordinates the space survey process, and organizes the data for UCOP reporting.
- Archibus Space and Occupancy data is used as the base data for the F&A Indirect Cost Recovery Survey.
- This is NOT a UCSF Health Space Survey

# HOW DO WE DO A SPACE SURVEY DURING COVID-19?

- We understand that this year is difficult in many ways and being on campus simply won't be an option for many. Please do your best to:
  - Remove occupants who you know have left UCSF
  - Correct PI assignments in labs: PI Pending, Inactive, or Missing
  - Check that rooms have the right occupants assigned **to the best of your knowledge**
  - Use the Data Error Reports that have been sent to Strategists earlier this week as a guide for data points to focus on

**If you are working 100% (or less) remote but still have a designated work space at UCSF, you will continue to track yourself in that UCSF space.**

# WHO UPDATES UCSF SPACE DATA



## **SPACE COORDINATOR**

*(Department level space contact)*

### **ACCESS:**

Read-Write access for their assigned Dept. ID's only.

### **RESPONSIBILITIES:**

- Keeps Department's/Unit's assigned space up to date in Archibus
- Submits the Annual Survey for their assigned space
- Requests space assignments on their Department's behalf to their Control Point Strategist
- Informs UCSF Real Estate of completed renovation projects not reflected in Archibus
- Updates Employee Locations
- Attends UCSF Real Estate-led trainings and meetings
- Conducts space walks informally and in collaboration with UCSF Real Estate

Please refer to "**User Roles**" Report in Archibus.

# WHO UPDATES UCSF SPACE DATA



## SPACE STRATEGIST

*(Control Point/BU oversight of Space Management)*

### **ACCESS:**

Edit/Write access for entire Control Point/ BU + Approval access for intra-Control Point/ BU Departmental space assignments + Updates to Loan fields and data changes within the same Control Point/ BU

### **RESPONSIBILITIES:**

All Space Coordinator +

- Main space point of contact for their Control Point
- Tracks loans within Control Point
- Represented on the UCSF Space Subcommittee
- Facilitates space assignment requests for their Direct Report's approval
- Reviews and processes Space Request Forms (SRF) submitted by Space Coordinators within their Control Point. If request is outside of Control Point, requests are forwarded to Campus Planning for review.

Please refer to **"User Roles"** Report in Archibus.

# SPACE STRATEGISTS FOR UCSF

Control Point/ BU	Space Strategist	Control Point/ BU	Space Strategist
D_School of Dentistry	Eunice Stephens * Maria Rina-Simon	C_Office of the Chancellor E_Executive Vice Chancellor O_VC Diversity & Outreach	Suzanne Murphy * Ruth Pacquing
M_School of Medicine	Karin Wong * Adrian Miu John Ewers (ZSFG) Margaret Damiano (ZSFG)	R_University Relations	Michael Fortes *
N_School of Nursing	Michael Jaffe * Cecilia Chang Frances Lee	F_Finance & Administration	Shauna Strong * Rebecca Daro
P_School of Pharmacy	Michael Nordberg *	V_Development	Wendy Gamboa * Joseph Calger
L_Langley Porter Hospital	Michael Walker *	H_Global Health Sciences	Georgina Lopez *

\* Indicates Primary Strategist  
Last Updated August 21, 2020

# TIMELINE FOR 2020 SPACE SURVEY

Date	Activity
<b>Space Survey</b>	
Aug. 27 <sup>th</sup> 2020	Annual Space Survey begins
Sept. 30 <sup>th</sup> 2020	Cut-off date for adding any new Space Coordinators
Oct. 7 <sup>th</sup> 2020	Bulk update request cut off
Oct. 28 <sup>th</sup> 2020	Annual Space Survey ends
Oct. 30 <sup>th</sup> 2020	Snapshot of Space Data
Dec. 4 <sup>th</sup> 2020	UCSF Space Data will be reported to UCOP

*Please start early to allow time for discussion with your department and questions with System Admins.*

# HOW TO ACCESS ARCHIBUS

The screenshot shows the UCSF MyAccess portal interface. At the top, the UCSF logo and "University of California San Francisco" are on the left, and navigation links for "About UCSF", "Search UCSF", and "UCSF Medical Center" are on the right. Below this, the "MyAccess" logo is highlighted with a red dashed box. To its right, the user's name "Hello, Lisa Rolfsness (campusllettau)" and a "LOGOUT" button are visible. A secondary navigation bar contains "APPLICATIONS", "TERMS OF SERVICE", and "HELP". Below this is a search bar labeled "Filter Applications" with a "Clear Filter" button and a "Manage Favorites" button. A list of applications follows, with the first item, "Archibus Space Management System", highlighted by a red dashed box and an orange arrow. The other items are "Chatter" and "MyAccess - Lookup".

UCSF University of California San Francisco About UCSF Search UCSF UCSF Medical Center

MyAccess My ID Hello, Lisa Rolfsness (campusllettau) LOGOUT

APPLICATIONS TERMS OF SERVICE HELP

Filter Applications Clear Filter Manage Favorites

- ★ [Archibus Space Management System](#) SSO  
Archibus is a space management system that enables... and maintain its buildings portfolio for Campus and Med Center in one application. The system allows authorized.../edit tabular data, and provides dynamic reporting and floor plans.  
Last Update: April 21, 2020
- ★ [Chatter](#) SSO  
UCSF Chatter is a private, professional networking and collaboration tool. It allows users to create secured workspaces and invite users from UCSF (and externally) to exchange conversation and version-controlled files.  
Last Update: Unknown
- ★ [MyAccess - Lookup](#) SSO  
EDS user lookup service. This application is only available to authorized users. If you need access, please contact the Service Desk at 415-514-4100 and open a ticket directed to Identity and Access Management.  
Last Update: February 11, 2020

# ARCHIBUS HOME PAGE

**ARCHIBUS** Coordinator Home Page 020750683 Find a form or report ?

### Tasks

- Space Update Form
- Space Request Form
- View All Space Requests
- Space Console
- ARCHIBUS Report Builder

### Reports

Departments/Occupancy

- Department By Building
- Building By Department
- Space Assignment and Occupancy by Department
- PIs By Department
- View All Rooms
- Occupancy

### Favorites

Drag a task here to add.

### Help

- Submit Feedback
- Training Resources
- Campus Planning Website
- F&A Tools and Training

*Will not work with pop-up blockers*

### Notifications

Welcome to the Archibus Space Management System!

**The 2020 Annual Space Survey is open from August 26th - October 28th**

For questions/comments please contact: [Archibus-Support@ucsf.edu](mailto:Archibus-Support@ucsf.edu)

Please clear your browser cache & cookies weekly to avoid any lag in System Updates

- Archibus Home Page (*user role is viewable on Home Page*)
- Important information under **Notifications Section**
- Training resources link: <https://space.ucsf.edu/2020-annual-space-survey>

# HOW TO UPDATE SPACE

The screenshot shows the ARCHIBUS Coordinator Home Page. At the top, there is a dark blue header with the ARCHIBUS logo on the left, the text "ARCHIBUS" in white, "Coordinator Home Page" in white, the user ID "020750683" with a dropdown arrow, a search bar containing "Find a form or report", and a help icon with a right-pointing arrow. Below the header, the page is divided into four main sections: "Tasks", "Reports", "Favorites", and "Help".

- Tasks:** Contains a list of links: "Space Update Form" (highlighted with a red arrow), "Space Request Form", "View All Space Requests", "Space Console", and "ARCHIBUS Report Builder".
- Reports:** Contains a list of links: "Departments/Occupancy", "Department By Building", "Building By Department", "Space Assignment and Occupancy by Department", "PIs By Department", "View All Rooms", and "Occupancy".
- Favorites:** Contains a dashed box with the text "Drag a task here to add." and a trash can icon.
- Help:** Contains a list of links: "Submit Feedback", "Training Resources", "Campus Planning Website", and "F&A Tools and Training".

Below these sections is a "Notifications" section with a light blue background. It contains the following text:

**Welcome to the Archibus Space Management System!**  
**The 2019 Annual Space and F&A Survey is now closed**  
For questions/comments please contact: [Archibus-Support@ucsf.edu](mailto:Archibus-Support@ucsf.edu)  
Please [clear your browser cache & cookies weekly](#) to avoid any lag in System Updates

# HOW TO UPDATE SPACE

**ARCHIBUS** Coordinator Home Page Tasks 020750683 Find a form or report

## Space Update Form

[My Room List](#)
[Active Space Update Room List](#)
[Room Details](#)
[All Rooms](#)

[Download XLS](#)
[Update Rooms](#)

Room Information

Building Code: 2 [54] All [54]

Space Update Status	Floor Plan	Building Code	Building Name	Floor Code	Room Code	BU Name	Division Name	Department Name	Principal Investigator	Room Category	Room Type	Room Area Sq. Ft.	Number of Stations	Availabi
<input type="checkbox"/> Ready		2450	Laurel Heights	02	263	M_School of Medicine	M_IHPS (Health Policy Studies)	M_IHPS (Health Policy Studies)		C-ADMIN	CONFRNCE RM	856.72	45	
<input type="checkbox"/> Ready		2450	Laurel Heights	02	263A	M_School of Medicine	M_IHPS (Health Policy Studies)	M_IHPS (Health Policy Studies)		C-ADMIN	CONF RM SUP	90.76	0	
<input type="checkbox"/> Ready		2450	Laurel	02	265	M_School of	M_IHPS (Health	M_IHPS (Health		C-ADMIN	ADMIN	333.02	2	
<input type="checkbox"/> Ready		2450										259.76	0	
<input type="checkbox"/> Ready		2450										139.75	5	
<input type="checkbox"/> Ready		2450										133.18	1	

**Space Update Form**

[My Room List](#)
[Active Space Update Room List](#)
[Room Details](#)
[All Rooms](#)



# SPACE STATUS FLOW DURING SURVEY



- ✓ Rooms are ready to be Surveyed
- ✓ Action: Check out Room
- ✓ Space Updates are a work in progress by Space Coordinators or Strategists
- ✓ All Rooms will remain in “In Progress” until the Space Survey is complete
- ✓ At the end of the Space Survey, the Space Status will be converted back to Ready
- ✓ Rooms will move to Submitted-Pending Approval Status if an approval is required from System Admins or Strategists

# 'SPACE SURVEYED' FEATURE

ARCHIBUS Coordinator Home Page Tasks 020750683 Find a form or report

## Space Update Form

My Room List Active Space Update Room List Room Details All Rooms

Building Code  Division Code  Department Code   
PI Name  F&A Req

Active Room Information  Space Surveyed     Complete F&A Survey

Modified By: 2 [3] All [3]

<input type="checkbox"/> Space Status	<input type="checkbox"/> Space Surveyed?	<input type="checkbox"/> FA Req	<input type="checkbox"/> FA Status	<input type="checkbox"/> Floor Plan	<input type="checkbox"/> Compare	<input type="text"/> Modified By	<input type="text"/> Building Code	<input type="text"/> Building Name	<input type="text"/> Floor Code	<input type="text"/> Room Code	<input type="text"/> BU Name	<input type="text"/> Division Name	<input type="text"/> Department Name
<input type="checkbox"/> In Progress	No	N/A	N/A	<input type="checkbox"/>	<input type="checkbox"/>	Lisa Lingham	2450	Laurel Heights	02	265B	M_School of Medicine	M_IHPS (Health Policy Studies)	M_IHPS (Health Polic
<input checked="" type="checkbox"/> In Progress	Yes	N/A	N/A	<input type="checkbox"/>	<input type="checkbox"/>	Lisa Lingham	2450	Laurel Heights	02	265C	M_School of Medicine	M_IHPS (Health Policy Studies)	M_IHPS (Health Polic
<input checked="" type="checkbox"/> In Progress	Yes	N/A	N/A	<input type="checkbox"/>	<input type="checkbox"/>	Lisa Lingham	2450	Laurel Heights	02	267	M_School of Medicine	M_IHPS (Health Policy Studies)	M_IHPS (Health Polic

- Assist Coordinators to track Survey progress
- Changes 'Space Surveyed?' rooms from **No** to **Yes**
- Highlights Space Status for rooms in **green** when surveyed.
- For Shared Rooms, the Space Status will only change for the logged in Coordinator when they complete an update for their portion of the room.

# 'SPACE SURVEYED' FEATURE

**Space Update Form**  

My Room List **Active Space Update Room List** Room Details All Rooms

 Show  Clear

Building Code  Division Code  Department Code   
PI Name  F&A Req

Active Room Information  Space Surveyed     Complete F&A Survey 

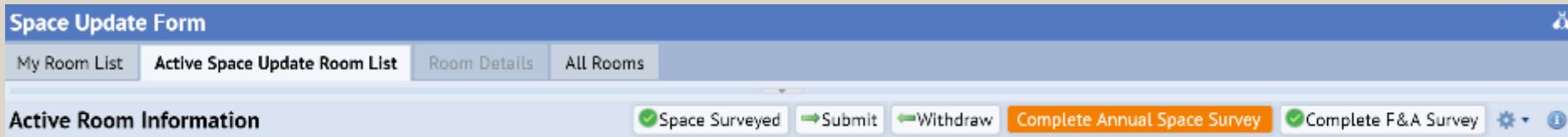
Building Code: 2 [60] 3 [12] All [72]

<input type="checkbox"/>	Space Status	FA Req	FA Status	Floor Plan	Compare	Modified By	Building Code	Building Name	Floor Code	Room Code	BU Name	Division Name	Department Name
<input type="checkbox"/>	In Progress	N/A	N/A			Chris Andreassi	3002	Genentech Hall	02	N212F	M_School of Medicine	M_PEDIATRICS	M_PEDS-HI
<input type="checkbox"/>	In Progress	N/A	N/A			Chris Andreassi	3002	Genentech Hall	02	N214	SHARED	SHARED	SHARED
<input type="checkbox"/>	In Progress	N/A	N/A			Chris Andreassi	3002	Genentech Hall	02	N214A	SHARED	SHARED	SHARED
<input type="checkbox"/>	In Progress	N/A	N/A			Chris Andreassi	2316	Helen Diller Family Cancer Research	02	222	SHARED	SHARED	SHARED

- All Rooms will be required to be marked as “**Space Surveyed**” by Space Coordinators before the end of Space Survey October 28<sup>th</sup> 2020.
- Any rooms left over as Not Surveyed after October 28<sup>th</sup> will be assumed as Surveyed by Coordinators and marked as ‘Surveyed’ by System Admins.

For more details, please refer to Job aids at :  
<https://space.ucsf.edu/2020-annual-space-survey>

# WHEN/WHO TO CLICK THE ORANGE BUTTON



- The Complete Annual Space Survey button is only active during the Space Survey period
- Within a department, Coordinator(s) should collaborate with other coordinators (if multiple) and only click the “Complete Annual Space Survey” button when all rooms for the department (in Archibus – Division) are updated.
- Strategists should only click the “Complete Annual Space Survey” button, if there are No Coordinators assigned for certain departments within their control point and **Only** after all other Coordinators within their control point have completed their survey. (*Dean’s office surveys*)

When a Strategist clicks the “Complete Annual Space Survey” button, the action applies to all of the rooms for their Control Point.

# REPORTING: SURVEY PROGRESS

The screenshot displays the ARCHIBUS Coordinator Home Page. The top navigation bar includes the ARCHIBUS logo, a 'Coordinator Home Page' dropdown menu, and a search bar labeled 'Find a form or'. The main content area is divided into four columns: 'Tasks', 'Reports', 'Favorites', and 'Help'. The 'Reports' column is highlighted with a red circle, and a red thought bubble is overlaid on it, containing the text 'Which groups are still incomplete?'. The 'Notifications' section at the bottom provides a welcome message and details for the 'ANNUAL SPACE SURVEY TOWN HALL - 2019' on Thursday, September 5th from 10:00 - 11:30 AM at HSW 303. It also includes instructions to clear the browser cache and cookies weekly and a contact email for support: Archibus-Support@ucsf.edu.

**ARCHIBUS** Coordinator Home Page Find a form or

**Tasks**

- Space Update Form
- Space Request Form
- View All Space Requests
- Space Console

**Reports**

- Annual Space Update Process
- Space Update Status by Division
- Space Update Status by Department
- F&A Reports**
- F&A Status by Department
- F&A Status by Division
- F&A DP/PI Exception Report
- F&A Survey Exception Report

**Favorites**

Drag a task here to add.

**Help**

- Submit Feedback
- Training Resources
- Campus Planning Website
- F&A Tools and Training

**Notifications**

Welcome to the Archibus Space Management System!

For updates and revisions to Space Survey, please attend the

**ANNUAL SPACE SURVEY TOWN HALL - 2019**

on Thursday, September 5th from 10:00 - 11:30 AM at HSW 303

Please [clear your browser cache & cookies weekly](#) to avoid any lag in System Updates.

For questions/comments please contact: Archibus-Support@ucsf.edu

Which groups are still incomplete?

*Reports are available for the Space Survey to track progress by Division and Department.*

# SPACE UPDATES VIA BULK UPDATE

Certain fields can be bulk uploaded for updating in coordination with System Admins:

- Division/ Department
  - Rooms within your Control Point/ BU
  - Not available for shared rooms
- Room Categories/ Type
- Station Counts
- Loan Details & Documentation

All bulk update requests must be received by **Oct. 7<sup>th</sup> 2020** to allow Administrators time to process requests.

For more details on format requirements, please refer the Bulk Upload Job Aid at:  
<https://space.ucsf.edu/2020-annual-space-survey>

# F&A SURVEY UPDATE

**Space Update Form**  

My Room List **Active Space Update Room List** Room Details All Rooms

Building Code  Division Code  Department Code   
PI Name  F&A Req

**Active Room Information**    **Complete Annual Space Survey**  

Building Code: 2 [60] 3 [12] All [72]

<input type="checkbox"/> Space Status	FA Req	FA Status	Floor Plan	Compare	Modified By	Building Code	Building Name	Floor Code	Room Code	BU Name	Division Name	Department
<input type="checkbox"/> In Progress	N/A	N/A			Chris Andreassi	2281	Mission Hall Building	04	4506	M_School of Medicine	M_PEDIATRICS	M_PEDS
<input type="checkbox"/> In Progress	N/A	N/A			Chris Andreassi	2281	Mission Hall Building	04	4507	M_School of Medicine	M_PEDIATRICS	M_PEDS
<input type="checkbox"/> In Progress	N/A	N/A			Chris Andreassi	2281	Mission Hall Building	04	4508	M_School of Medicine	M_PEDIATRICS	M_PEDS

- Archibus will not be used for the F&A Survey this year.
- ALL USERS can disregard the F&A related survey buttons and fields.
- The BRM team will be collecting F&A Data manually through specific outreach.
- The BRM F&A team appreciates the valuable detail that was collected during last year's survey and will reach out for additional detail as needed.

# SYSTEM UPDATES

- Archibus upgrade – v22 to v24
- Space Console Updates
- Space Update Form – Room history feature
- UCSF Directory – Remote Employees designation



# SPACE CONSOLE UPDATES

The screenshot displays the ARCHIBUS Space Console interface. At the top, the header includes the ARCHIBUS logo, 'Campus Admin Home Page', 'Applications Tasks', and the user ID '029257136'. A search bar contains the text 'Find a form or report'. Below the header, the 'Space Console' title is followed by a 'Space' tab and an 'Occupancy' tab. A 'Show 3D' button is highlighted with a red dashed box. The interface features a floor plan visualization with various colored rooms (green, blue, orange, purple, grey). A legend titled 'Assets & Backgrounds' is also highlighted with a red dashed box, listing items like 'Gross Area', 'Labels of Gross Area', 'Room', and 'Labels of Room' with checkboxes. Below the floor plan is a table with columns for Building, Floor, Drawing, Room Area ft², and Capacity.

Building	Floor	Drawing	Room Area ft²	Capacity
<input type="checkbox"/>	3043	01	3043_01	27,949.79
<input checked="" type="checkbox"/>	3043	02	3043_02	28,002.67
<input type="checkbox"/>	3043	03	3043_03	6,947.34
			<b>62,899.80</b>	<b>0</b>

- Added feature – turning floor plan layers on/off
- Disregard Show3D button



# SPACE UPDATE FORM – ROOM HISTORY FEATURE

ARCHIBUS Coordinator Home Page Tasks 020750683 Find a form or report

Space Update Form

My Room List **Active Space Update Room List** Room Details All Rooms

Building Code: Division Code: Department Code: PI Name: F&A Req: Show Clear

Active Room Information Room Code: 211All

Space Surveyed Submit Withdraw Complete Annual Space Survey Complete F&A Survey

Space Status	FA Req	FA Status	Floor Plan	Compare	Modified By	Building Code	Building Name	Floor Code	Room Code	BU Name	Division Name	Department Name	Principal Investigator	Room Category	Room Type	Date Modified	Room Area Sq. Ft.	Number of Stations	Availability	Date
<input type="checkbox"/>					Lisa Lingham	2450	Laurel Heights	02	267	M_School of Medicine	M_IHPS (Health Policy Studies)	M_IHPS (Health Policy Studies)	Clare Brindis	C-DRY LAB	DRY LAB SUP	8/24/2020	2,308.77	20	7	8/2

**Updates in the Last Year**

Building Code	Building Name	Floor Code	Room Code	Start Date	End Date	Room Category	Room Type	Division Name	Department Name	Date Started	Date Approved	PI Name	Percentage of Space
2450	Laurel Heights	02	267			C-DRY LAB	DRY LAB SUP	M_IHPS (Health Policy Studies)	M_IHPS (Health Policy Studies)	8/24/2020		R.Adams Dudley	4.00
2450	Laurel Heights	02	267			C-DRY LAB	DRY LAB SUP	M_IHPS (Health Policy Studies)	M_IHPS (Health Policy Studies)	8/24/2020		Janet Coffman	16.00
2450	Laurel Heights	02	267	10/29/2019									0.00
2450	Laurel Heights	02	267			C-DRY LAB	DRY LAB SUP	M_IHPS (Health Policy Studies)	M_IHPS (Health Policy Studies)	8/24/2020		Benjamin Rosner	14.00
2450	Laurel Heights	02	267	12/17/2019		C-DRY LAB	DRY LAB SUP	M_IHPS (Health Policy Studies)	M_IHPS (Health Policy Studies)			Janet Coffman	16.00
2450	Laurel Heights	02	267	12/17/2019		C-DRY LAB	DRY LAB SUP	M_IHPS (Health Policy Studies)	M_IHPS (Health Policy Studies)			Claire Brindis	32.00
2450	Laurel Heights	02	267	12/17/2019		C-DRY LAB	DRY LAB SUP	M_IHPS (Health Policy Studies)	M_IHPS (Health Policy Studies)			R.Adams Dudley	4.00
2450	Laurel Heights	02	267	12/17/2019		C-DRY LAB	DRY LAB SUP	M_IHPS (Health Policy Studies)	M_IHPS (Health Policy Studies)			Jamesg Kahn	10.00
2450	Laurel Heights	02	267	12/17/2019		C-DRY LAB	DRY LAB SUP	M_IHPS (Health Policy Studies)	M_IHPS (Health Policy Studies)			Grace A Lin	8.00
2450	Laurel Heights	02	267	12/17/2019		C-DRY LAB	DRY LAB SUP	M_IHPS (Health Policy Studies)	M_IHPS (Health Policy Studies)			Daniel Dohan	16.00

# REMOTE EMPLOYEES

Lisa Rolfsness	
Title	CAD/CAFM Analyst
Department	F_Real Estate
Email	Lisa.Lettau@ucsf.edu
Campus Office Address	
Address	Remote Location, 001 Varies, Varies
Phone	(510) 323-6782

- Remote Employee virtual room added to Archibus/UCSF Directory
- **100% remote employees with NO designated workstation or office at UCSF**

# MOVING DURING THE SPACE SURVEY?



- Vacated space should be documented by submitting a Space Request Form in Archibus
- Space Analytics will be working with Move Coordinators to input upcoming move details

# **THE IMPORTANCE OF ACCURATE SPACE DATA**

# SPACE DATA

## Accurate space information is important to UCSF

- ✓ Provides the means for effectively managing our growing space at UCSF
- ✓ Helps us understand what's going on in our buildings
- ✓ Supports facilities related cost recovery
- ✓ Required for the Annual UCOP Reporting

# SUPPORTING DATA INTEGRITY

Focus on Space Update, particularly these fields:

- ✓ Department Assignment and Percentage %
- ✓ Room Category/ Room Type
- ✓ Loan Information
- ✓ PI Assignment or 'PI Assignment Pending' rooms
- ✓ Station Counts
- ✓ Employee Occupancy



# TIPS ON SUPPORTING DATA INTEGRITY

Few ideas that can help you find data anomalies for your department's space assignment:

- Confirm accuracy of **Research Rooms** with '**PI Assignment Pending**' Status
- Cross reference **Station count, Employees Assigned** and **Availability** field
- Rooms that are **occupiable** (*assigned to your department*) and are **shown without employees**
- **Employees** from your department and **have no space assignments** in the system
- Update Employees' **primary location** and if appropriate, multiple locations

# DATA ERROR REPORTS



Data error reports have been sent to all Strategists and should be distributed to Coordinators for review during the Space Survey.

## **Data was reviewed to help identify inaccuracies in the following:**

- Station Counts
- Employees Assignments – Over capacity, assigned to rooms that should not have employees, etc...
- PI Data – PI Assignment Pending, PI missing, PI assigned with employee status other than Active
- Renovation – Rooms with category C-RENOVATION

# ROOM CATEGORY/ TYPE

- Space usage is classified into Room Category and Type
- Room Type reflects the **predominant** use of the space in terms of "activity" in the room
- Campus Room Categories begin with "C-"; Medical Center Categories begin with "M-"

Room Type Reference Guide is available at:

<https://space.ucsf.edu/archibus-training-materials>

# ROOM TYPE DEFINITIONS: “OFFICE”

**Academic Office**: A room used by faculty, department chairs, *academic* deans, and other academic instructional appointees (e.g., lecturers, instructors) teaching assistants, emeriti, or postdoctoral scholars, to perform their desk-based academic work.

**Admin Office**: A room used by administrative staff, including academic administrative staff (e.g., administrative deans, provosts, directors), to perform their desk-based administrative work.



*Reference: Facilities Inventory Guide, University of California, Office of the President.*

# “WET” LABS AND “DRY” LABS



**“Wet” Lab (Research Lab):** A room used for experimentation, research, or training in research methods; or professional research and observation; or structured creative activity within a specific program, ***if the setting requires laboratory equipment... or structural support beyond that of an office.***

**“Dry” Lab (Research Office):** A room used for experimentation, research, or training in research methods; or professional research and observation; or structured creative activity within a specific program and ***which primarily contains office-type accommodations.*** Includes offices in which professional and staff researchers and graduate students engage in ***desk, computer, or table top research...***

*Reference: Facilities Inventory Guide, University of California, Office of the President.*

# SUPPORT AREAS & NON-ASSIGNABLE SPACE

**Research Lab or Office Support** : A room that directly serves one or more primary research offices as an extension of the activities in those rooms. Included are coatrooms, supply and storage areas, records rooms, ***private (restricted access) aisles or hallway type areas***, supporting research labs or offices.

**Circulation Area (Non-assignable):** ***Restricted access private*** aisles or hallway type areas supporting research labs and offices ***are included as a research/office support (assigned to PI's supported) and are not included in Circulation Area (Non-Assignable).***

*Reference: Facilities Inventory Guide,  
University of California, Office of the President.*



# STATION COUNTS

- What counts as a Station
  - The number of actual Stations which will adequately accommodate users in a particular room
  - Conference rooms – Count only the designed capacity of chairs and not extra chairs that have been placed in the room
  - Research Station – A typical research Station consists of one bench and one desk. (*There are rare exceptions*)
- Why it is important – for capacity and availability of space
  - Develop and explore new metrics for Strategic Planning
    - ASF per Station
    - ASF per Employee
    - No. of Stations per Employee



# WHERE ARE YOUR EMPLOYEES LOCATED?

- Update employee locations in Archibus!
- Easiest way to do this is via the Space Update Form
- Every employee who requires a Station, should be located in a room.
- If you have multiple employee updates and need help, please reach out to System Admins for assistance.
- When an employee is removed from a room, and not reassigned the employees location will appear as 'Location Required' in the UCSF Directory.
- System Admins will perform a periodic review of 'Location Required' employees.

# PI PENDING > 2 YEARS

- **Problem/Issue:** Space coded PI Assignment Pending for more than two years is a priority metric to be addressed
- Any space that is vacant for a full two plus years should be examined for immediate attention by the space coordinators and strategists
- Space metrics may be formally introduced to require departments to relinquish space that is vacant for more than two years - likely to be an iterative process to get close to target of zero ASF
- **Action Required:** Closely examine all lab and lab support space labeled PI Assignment Pending to ensure the accuracy of this data

# PI PENDING > 2 YEARS

Data by School for FY2016 to 2018 for both wet and dry research space.

Unit	Wet PI Pending ASF during 2016-2018		Dry PI Pending ASF during 2016-2018		Total PI Pending ASF > 2 Yrs
	Wet PI Pending ASF >2 Years (% of total Wet ASF)	Total Wet Research ASF (2018)	Dry PI Pending ASF >2 Years (% of total Dry ASF)	Total Dry Research ASF (2018)	
Dentistry	15,084 (32%)	47,795	986 (52%)	1,900	16,070
Medicine	93,807 (11%)	880,464	18,693 (12%)	161,808	112,500
Nursing	0	1,466	71 (0%)	23,184	71
Pharmacy	3,328 (4%)	77,846	1,417 (6%)	21,598	4,745
<b>TOTAL*</b>	<b>112,219 (11%)</b>	<b>1,007,570</b>	<b>21,167 (10%)</b>	<b>208,491</b>	<b>133,386</b>

# No SPACE PIs

- Subset of PIs with no assigned space in Archibus, yet show sponsored financial activity in the GL
- Data Source of record is the ICR Benchmarking System that combines financial records from the GL with space records from Archibus
- The total ICR dollars associated with these “No Space” PIs is approximately \$33.8 million, representing 12% of the total ICR
- **Problem/Issue:** With the business logic associated with the RASP metrics, we have no way to determine whether these PIs should be classified as Wet Lab or Dry Lab PIs and thus the dollars noted above would be excluded from the metric, if adopted

# No SPACE PIs

- What are we doing about it? The Space Work Group is actively pursuing the integrity of the space data and will continue to address errors in the data.
- In some cases, the lack of assigned space may be correct:
  - Training grants that show the dollars with the post doc, but the space is assigned at the Faculty level;
  - SON PIs with homeless population grants;
  - Global Health activity in space outside of Archibus, etc.
- **Action Required:** For all PIs with Sponsored Financial Activity, ensure that the space used to conduct that activity is coded and captured properly in Archibus

# **SURVEY SUPPORT**

# WEEKLY TRAINING SESSIONS

## Weekly training sessions for assistance with Space Survey

Weekly training sessions via Zoom will be available during the Annual Space Survey to answer any questions.

Check-ins                      System Admins will be doing check-ins with Strategists every 3 weeks to review survey progress and other updates

Meeting Date	Time	Zoom Details
01-Sept	10:00 - 11:00	<p style="text-align: center;"><a href="#">Link to Join Zoom</a></p> <p><b>Meeting ID: 925 7029 4455</b> <b>Password: 532796</b></p> <p><b>Telephone:</b> <b>US: +1 669 900 6833</b> <b>or +1 213 338 8477</b></p>
08-Sept	10:00 - 11:00	
15-Sept	10:00 - 11:00	
22-Sept	10:00 - 11:00	
29-Sept	10:00 - 11:00	
06-Oct	10:00 - 11:00	
13-Oct	10:00 - 11:00	
20-Oct	10:00 - 11:00	

\* Complete schedule for weekly drop-in sessions available here:

<https://space.ucsf.edu/2020-annual-space-survey>

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## Archibus: UCSF's Space Management System

### Overview

The Space Analytics team is responsible for the square feet of UCSF space. The team maintains reporting to the University of California, Office of System is used for the coding and classification of space, and its attributes such as space assignment and occupancy. The Space Analytics team works with campus departments and partners across UCSF Real Estate to ensure graphical consistency with the space inventory and the overall accuracy of campus space records.

To contact the Space Analytics team, please email [Archibus-support@ucsf.edu](mailto:Archibus-support@ucsf.edu).

### Archibus End Users:

**Data in Archibus should be updated on a regular and frequent basis, thus improving real-time data integrity and lessening the administrative work on users during the survey period that occurs in the fall of each year.** Employee location data in Archibus, in addition to PI Assignments information, for each room should be updated frequently as accurate space utilization information is critical for key leadership decisions. With Archibus reporting and functionality, UCSF is constantly improving transparency and collaboration in all our space management activities. There are three types of end-user roles for campus users in Archibus:

- Archibus New User Access
- Archibus Training Materials
- Space Management FAQ
- 2020 Annual Space Survey**
- F&A Tools and Training

- Zuckerberg San Francisco General
- 2 North Point
- Other Sites

### Latest Space News

**UCSF Conducts Comprehensive Seismic Review of All Buildings.**  
[Read the story.](#)

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## 2020 Annual Space Survey

The 2020 Annual Space Survey season kicks off on August 26th with our Town Hall and will close on October 28th. This will be UCSF's fifth annual space survey using Archibus.

### 2020 Town Hall Kickoff Presentation:

[Presentation Deck](#) (coming soon)

[Presentation Recording](#) (coming soon)

### 2020 Training Materials:

Training materials are available by role (Space Coordinator or Space Strategist) in the [Archibus Training Materials](#) section of our website.

The following Job Aids can help you get a jump-start on completing your Space Survey:

- [Three Steps to Update Your Space](#)
- [Completing Your Annual Space Survey](#)
- [Space Surveyed Feature](#)
- [Bulk Upload Job Aid](#)

### 2020 Space Survey – Weekly Training Sessions via Zoom

Weekly Zoom sessions are available for all Coordinators and Strategists during the Annual Space Survey to review the survey process and help answer any questions. If you prefer another date/time for an ad-hoc 1:1 training session, please reach out to Space Analytics team at [Archibus-Support@ucsf.edu](mailto:Archibus-Support@ucsf.edu).

## Campus Sites

- [Laurel Heights](#)
  - [Parnassus Heights](#)
  - [Mission Bay and Dogpatch](#)
  - [Mount Zion](#)
  - [Zuckerberg San Francisco](#)
- General
- [2 North Point](#)
  - [Other Sites](#)

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# QUESTIONS & ANSWERS

