

Space Request Work Queue

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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.*

A screenshot of the Archibus Space Request Work Queue table. The table has a header row with the following columns: SRF Number, Requested By Name, Request Type, Identify Type of Space, Division Name, Site Code, Building Name, Date of Request, Planner Assigned, Status, and Workflow Stage. The table contains three rows of data. The first row is for SRF Number 52, requested by Angelina Marinello, with a status of 'Request Received'. The second row is for SRF Number 51, requested by Kelly Graff, with a status of 'Request Received'. The third row is for SRF Number 14, requested by Kelly Graff, with a status of 'Request Received'. The 'SRF Number' column for the second and third rows is circled with a blue '3'.

SRF Number	Requested By Name	Request Type	Identify Type of Space	Division Name	Site Code	Building Name	Date of Request	Planner Assigned	Status	Workflow Stage
52	PDF Angelina Marinello	Retain	Academic Office	F_Fin BRM and Risk			9/11/2017	TBD	Request Received	Strategist
51	PDF Kelly Graff	Assignment	Administration	F_FAS Control Point Ops	MB	Byers Hall	9/11/2017	TBD	Request Received	Strategist
14	PDF Kelly Graff	Loan	Administration	F_PMO UCSF Prog Mgmt Office	MC	Mission Center Building	6/30/2016	TBD	Request Received	Strategist

3. When you have located the row which you want to take action on click anywhere on that line.

Space Request Work Queue- Review an SRF

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.

The screenshot displays the ARCHIBUS Space Request Form interface. The top navigation bar includes the ARCHIBUS logo, 'Strategist Home Page', 'Tasks', 'STRAT1', 'Sign Out', and 'Help'. A search bar contains 'Find a form or report'. The main form area is titled 'Space Request Form' and includes buttons for 'Save', 'Forward', 'Complete', and 'Cancel'. Fields include 'SRF Number' (90), 'Requested By Name' (Bonnie Maler), 'Date of Request' (2/24/2016), 'Division Name*' (M_Osher Center), 'Department Name*' (M_Osher-Central Admin), and 'Program Name'. A 'Reason for Request' text area is present. Below the form are checkboxes for 'Academic Office' and 'Administrative'. A section for 'Identify Type of Space' and 'Type of Space Comments' is also visible. A modal window is open, asking 'Has your Chancellor Direct Report approved this request?' and 'Is there any space under your Chancellor's Direct Report that can address this need through maximizing utilization, reconfiguration, etc. (Y or N)'. It has 'No' dropdowns for 'Analysis' and 'Resolution', and a large text area for comments. A '5' in a blue circle points to the text area. The modal has 'Save', 'Forward', 'Complete', and 'Cancel' buttons. Below the modal is a 'Documents' section with 'Add New' and 'No records to display.' A '6' in a blue circle points to the search bar in the top navigation bar.

Space Request Work Queue- Review an SRF, cont.

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 ARCHIBUS 'Space Request Form' interface. At the top, the ARCHIBUS logo and 'Strategist Home Page' are visible. A search bar contains the text 'Find a form or report'. Four numbered callouts (1-4) are placed above the 'Save', 'Forward', 'Complete', and 'Cancel' buttons respectively. The form fields include: SRF Number (90), Requested By Name, Date of Request (2/24/2016), Division Name* (M_Osher Center), Strategist Name* (Bonnie Maler), Department Name* (M_Osher-Central Admin), and Program Name. Below the form are two sections: 'Identify Type of Space' and 'Type of Space Comments'. The 'Identify Type of Space' section has a dropdown menu set to 'No' and a text area for 'Analysis'. The 'Type of Space Comments' section has a dropdown menu set to 'No' and a text area for 'Resolution'. At the bottom of the form are buttons for 'Save', 'Forward', 'Complete', and 'Cancel'. The interface also shows a 'Documents' section at the bottom with 'No records to display.'

SRF Status Definitions

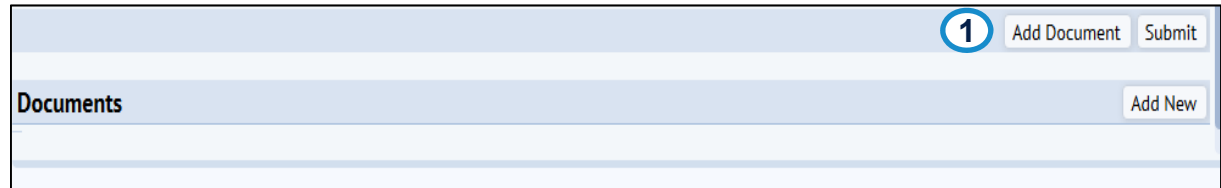
SRF Status	Description
Request Received	Space Request Form (SRF) has been submitted via Archibus and could be with either the Strategist or Planner. If a Planner is assigned and shown in Archibus, then the request has been received by Campus Planning as a Direct Strategist approved request.
In Progress	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.

Additional Fields on the Strategist's SRF

Title	Type	Comments/Values
23. Has your Chancellor Direct Report approved this request?	Drop-down	Required
24. Status	Drop-down	View only
25. Status Notes	Free-form text	View only
26. Chancellor's Control Point DeptID	Lookup	Required
27. Chancellor's Direct Report Name	Free-form text	Required
28. Is there any space under your Chancellor's Direct Report that can address this need through maximizing utilization, reconfiguration, etc.?	Drop-down	Required
29. Analysis	Free-form text	Optional

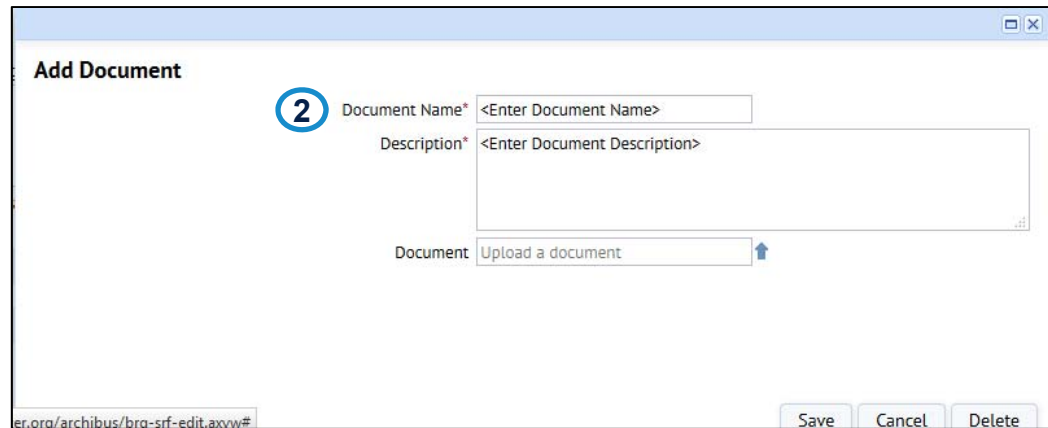
Adding Documents to the SRF

1. To add supporting documents to a SRF, click the **Add Document** action button at the bottom of the SRF.



2. The Add Document window opens.
(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. Its recommended not to attach documents with sensitive information.

A screenshot of a 'Add Document' dialog box. It contains three main input fields: 'Document Name*' with a text input field containing '<Enter Document Name>', 'Description*' with a larger text area containing '<Enter Document Description>', and 'Document' with a file upload button labeled 'Upload a document' and an upward arrow icon. At the bottom right, there are 'Save', 'Cancel', and 'Delete' buttons. A circled '2' is placed over the 'Document Name' field. The URL 'er.org/archibus/brq-srf-edit.axv#?' is visible at the bottom left.

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

You have completed the module