

How to Use the Space Request Form

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When Should I Use the **Space Update Form** vs. the **Space Request Form**

Use the Space Update Form to...	Use the Space Request Form to...
Make Room Category and/or Room Type changes	Change the Division/Department Name Assignment or Percentage of Space to a Dept. ID outside of your assigned permissions
Change the PI Assignment	Request a New space assignment E.g., A Department needs more Wet Lab space to accommodate new faculty
Add Notes to a Room	Vacate (releasing) space E.g., A Department is ending a grant funded program and wants to release their space back to the Dean's Office
Indicate who the loan is from for an existing loan	Initiate a Loan with another department Includes loans both within and across control point

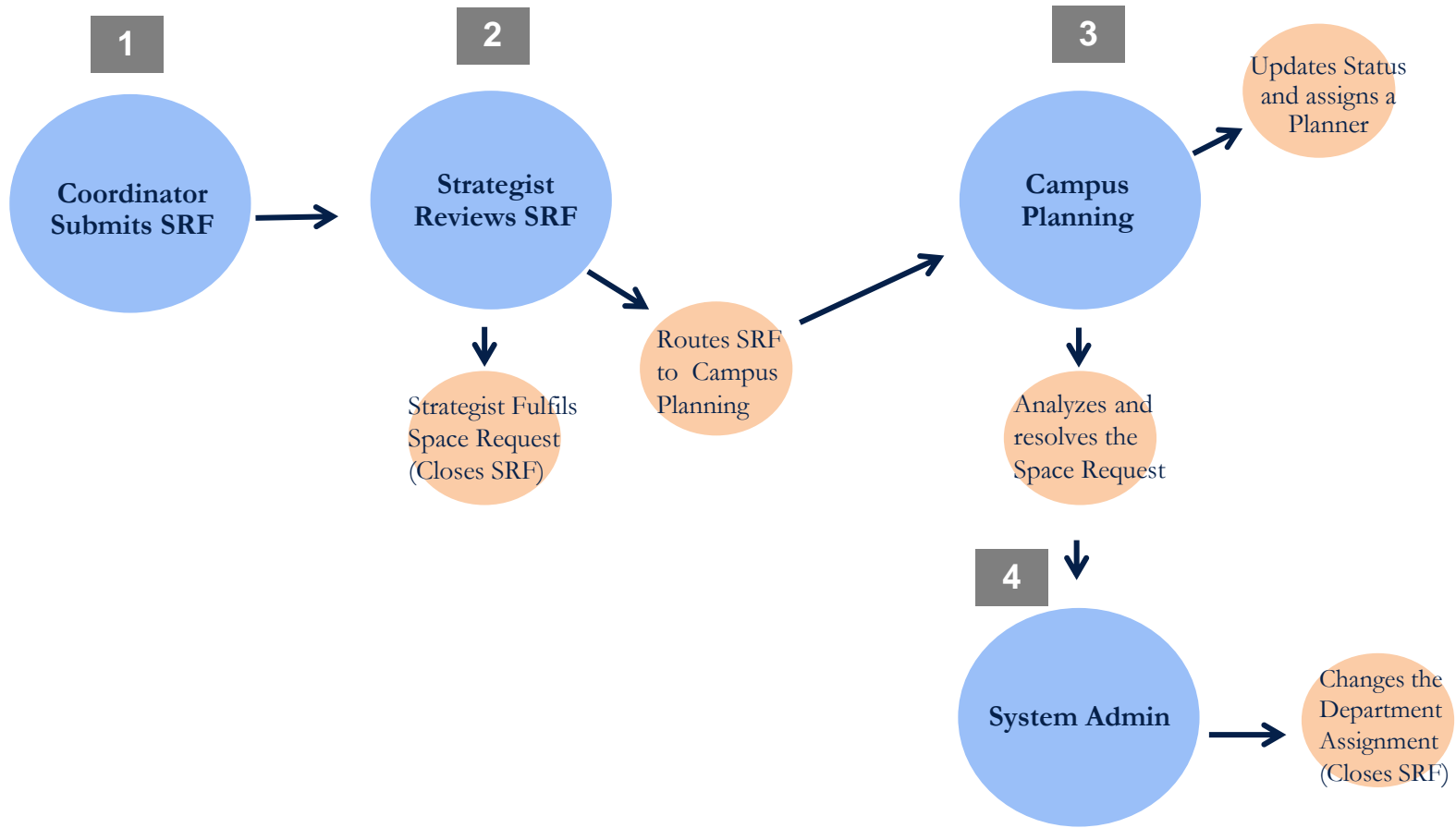
SRF Overview

- The Space Request Form (SRF) process in Archibus is intended to document and track all departmental assignment and loan change requests.
- Transparency: All Users of the system have visibility of the Space Requests, Notes and Attached Documents
- Departmental assignment changes in Archibus are performed manually once a decision is made by:
 - Strategists: when it's an approved assignment within Control Point
 - Campus Planning System Admins: when it's a Chancellor approved assignment

SRF Roles

Archibus Role	Space Request Form Responsibility
Coordinator	<ul style="list-style-type: none"> Can Initiate SRF
Strategist	<ul style="list-style-type: none"> Can Initiate SRF. Reviews requests submitted by Coordinator. Fulfills requests within their Control Point. Can Submit to a Planner (Campus Planning) if unable to fulfill the request
Planner (Campus Planning Office)	<ul style="list-style-type: none"> 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. Describes solution and forwards to System Admin for processing in Archibus.
System Admin (Campus Planning Office)	<ul style="list-style-type: none"> Updates Department/Division Name field in Archibus, closes request.

Space Request Form – Simple Workflow



SRF Workflow 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 that 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

Strategist , Planner or Admin Notification

-----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.axvww>

Coordinator Notification

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

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.

SRF Navigation

Space Request Form

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.

The screenshot displays the Archibus Space Management System interface. At the top, there are three main sections: **Tasks**, **Reports**, and **Favorites**. The **Tasks** section is highlighted, showing a list of tasks: **Space Update Form**, **Space Request Form** (marked with a blue circle 1), **View All Space Requests**, and **Space Console**. The **Reports** section lists: **Departments/Occupancy**, **Department By Building**, **Building By Department**, **Space Assignment and Occupancy by Department**, **Pls By Department**, **View All Rooms**, and **Occupancy**. The **Favorites** section has a placeholder: *Drag a task here to add.* and a trash icon. A **Help** button is visible on the far right.

Below the navigation bar, the **Space Request Form** is displayed. It has a **Submit** and **Cancel** button in the top right corner. The form contains the following fields:

- 1. Requested By Name: Erika Luger (greyed out, marked with a blue circle 2)
- 2. Date of Request: 5/2/2016 (greyed out)
- 3. Division Name* (required field, marked with a blue circle 3)
- 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 (dropdown menu)
- 11. Total ASF
- 12. Campus Site Preferred
- 13. Building Preferred

SRF Form Layout

- The SRF in general is identical for both Coordinator and Strategists.
- The Strategists however have additional fields located at the bottom of the SRF. A coordinator will not see these fields on their SRF.

ARCHIBUS
Strategist Home Page
Tasks -
023794886 - Sign Out Help
Find a form or report

Submit Cancel

Space Request Form

1. Requested By Name
Jill Goldsmith

2. Date of Request
5/9/2016

3. Division Name*

4. Department Name*

5. Strategist Name*
Jill Goldsmith

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

14. Floor and Rooms Preferred

15. Building Preferred Comments

16. Headcount for existing employees to be accommodated by this request

17. Headcount for planned employees to be accommodated by this request; Full time or part time? When will they be hired?

18. Will requested space (choose one)
Fully relocate a program

19. When is the space needed? And for how long?

20. Adjacency requirements (e.g., Required adjacency to other programs or clinics.)

21. Please specify what space (buildings and rooms) that you currently occupy. Will you release any of this space?

22. Does your Department/Unit Head approve this request?
No

23. Has your Chancellor Direct Report approved this request?
No

24. Status
Request Received

25. Status Notes

26. Your Control Point DeptID*

27. Chancellor's Direct Report Name*

28. Is there any space under your Chancellor's Direct Report that can address this need through maximizing utilization, reconfiguration, etc. (Y or N)?
No

29. Analysis

30. Resolution

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Required/Optional Fields in Detail

Title	Type	Notes
1. Requested By Name	Auto-populated	Required
2. Date of Request	Auto-populated	Required
3. Division Name	Lookup	Required
4. Department Name	Lookup	Required
5. Strategist Name	Lookup	Required Note: Select the *Primary* Strategist for your Control Point, unless directed otherwise by your Strategists.
6. Program Name	Free-form text	Optional
7. Reason	Free-form text	Optional
8. Identify Type of Space	Multiple Choice	Optional
9. Type of Space Comments	Free-form text	Optional
10. Request Type	Multiple Choice	Optional
11. Total ASF	Free-form text	Optional

Continued on next slide

Required/Optional Fields in Detail, cont'd

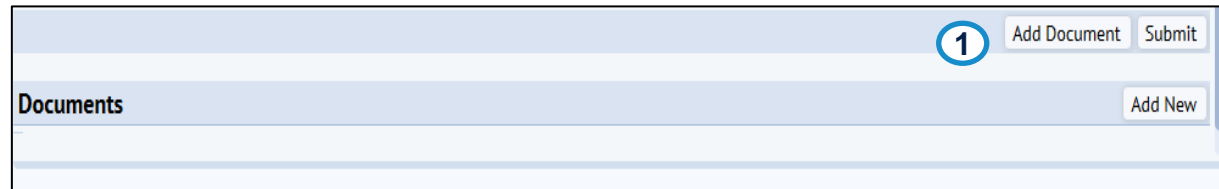
Title	Type	Notes
12. Campus Site Preferred	Lookup	Optional
13. Building Preferred	Lookup	Optional
14. Floor and Rooms Preferred	Free-form text	Optional
15. Building Preferred Comments	Free-form text	Optional
16. Headcount for existing employees to be accommodated by this request	Free-form text	Optional
17. Headcount for planned employees to be accommodated by this request; Full time or part time? When will they be hired?	Free-form text	Optional
18. Will requested space (choose one):	Drop-down	Optional
19. When is the space needed? And for how long?	Free-form text	Optional
20. Adjacency requirements (e.g., Required adjacency to other programs or clinics)	Free-form text	Optional
21. Please specify what space (buildings and rooms) that you currently occupy. Will you release any of this space?	Free-form text	Optional
22. Does your Department/Unit Head approve this request?	Drop-down	Required

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

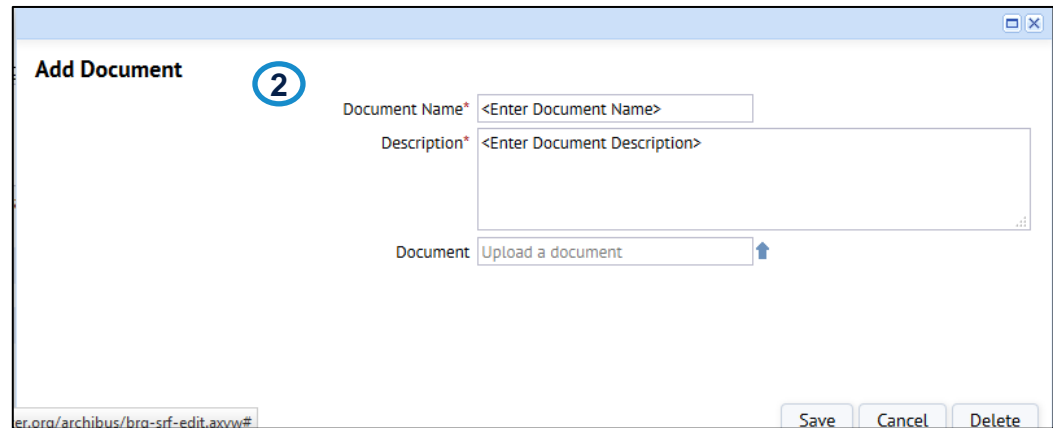
Adding Documents to the SRF

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 the 'Add Document' modal window. It has a title bar with 'Add Document' and a circled '2'. The form contains three 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 are 'Save', 'Cancel', and 'Delete' buttons. A URL 'er.org/archibus/brq-srf-edit.aspx#' 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

Submit an SRF for Review

1. Once you have completed the SRF and attached any applicable documents, click the **Submit** button.

Note: When creating a SRF, there is no Save button to allow you to save the SRF and return later to complete. SRFs must be filled out and submitted in one sitting.

1. The **Cancel** button is available to click if you do not wish to submit your form.

The screenshot shows the 'Space Request Form' interface. At the top right, there are two buttons: 'Submit' (labeled with a circled 1) and 'Cancel' (labeled with a circled 2). The form contains the following fields:

- 1. Requested By Name
- 2. Date of Request (5/9/2016)
- 3. Division Name* (M_School Level Adjustment)
- 4. Department Name* (M_School Level Adjustment)
- 5. Strategist Name* (Karin Wong)
- 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 (Retain)
- 11. Total ASF
- 12. Campus Site Preferred
- 13. Building Preferred
- 14. Floor and Rooms Preferred
- 15. Building Preferred Comments

View All Space Requests

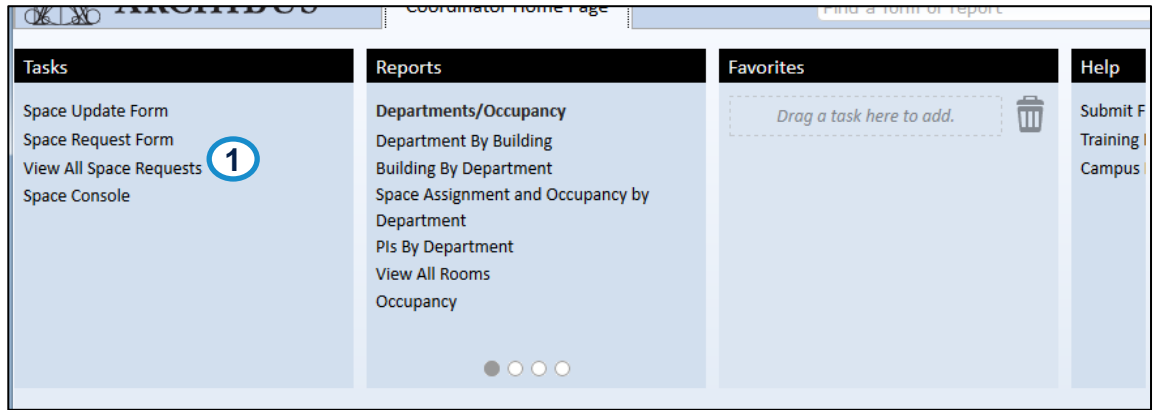
View All Space Requests

- **Transparency:** The details of all submitted Space Request Forms are visible via the **View All Space Requests tab**.
 - Allows read-only access to all space request forms and attached documents
 - Is available to all Campus users of the system

View All 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.



The screenshot shows the 'View All Space Requests' table. At the top right of the table, there is an 'XLS' button (circled with a blue '3') and a gear icon (circled with a blue '4'). The table has columns for 'SRF Number', 'Date of Request', 'Status', 'Workflow Stage', 'Requested By Name', 'Request Type', 'Identify Type of Space', and 'Division Name'. The table contains four rows of data.

SRF Number	Date of Request	Status	Workflow Stage	Requested By Name	Request Type	Identify Type of Space	Division Name
1	4/26/2016	Request Received	Planner	Erika Luger	Either Loan or Assignment	Administration	M_School Level A
2	4/26/2016	Request Received	Strategist	Erika Luger		Retain Storage	F_PMO UCSF Prog
3	4/26/2016	Approve	Strategist	Erika Luger		Retain Other	R_Digital Commu
4	5/2/2016	In Progress	Coordinator	Erika Luger		Retain	M_School Level A

View All Space Requests, cont.

- 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 [1] 2 [1] 3 [1] 4 [1] 5 [1] 6 [1] 7 [1] 8 [1] 9 [1] All [9] 5							
SRF Number	Date of Request	Status	Workflow Stage	Requested By Name	Request Type	Identify Type of Space	Division Name
1 6	4/26/2016	Request Received	Planner	Erika Luger	Either Loan or Assignment	Administration	M_School Level A
2	4/26/2016	Request Received	Strategist	Erika Luger		Retain Storage	F_PMO UCSF Prog
3	4/26/2016	Approve	Strategist	Erika Luger		Retain Other	R_Digital Commu
4	5/2/2016	In Progress	Coordinator	Erika Luger		Retain	M_School Level A

Space Request Form 7		8
0. SRF Number		Cancel
1		
1. Requested By Name	2. Date of Request	
Erika Luger	4/26/2016	
3. Division Name	4. Department Name	
M_School Level Adjustment	M_School Level Adjustment	
5. Strategist Name	6. Program Name	
Jill Goldsmith		
7. Reason		
Example for training purposes		

You have completed the module