How to Use the Space Update Form

Use the table of contents hyperlinks to navigate within the module

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Overview of the Space Update Form

Use the table of contents hyperlinks to navigate within the module

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Use a Form to Update Space Data

- The **Space Update Form** is used in Archibus to edit space data at the room level.

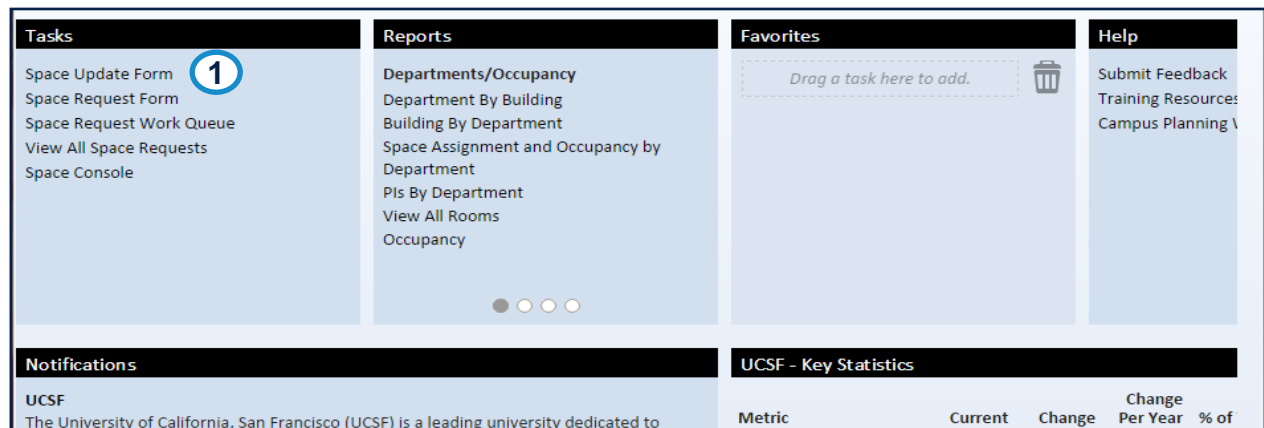**Workflow Rules (Coordinator/Strategist):**

- Some data edits are **saved immediately** to the database:
  - Notes
  - PI Name
  - Department Name if within the same department
  - Loan information

- Some data edits are **routed for approval** through workflow:
  - Room Category and Type changes are routed for approval to the System Admin
  - In rare cases, when Coordinator has edit access to more than one Archibus Division within or across control points, the requested change of the Division Name and Department Name are routed to the Strategist for review and approval.
    - Coordinator Should notify their Strategist when this change is requested

- To learn more about the data fields included in the Space Update Form, go to the following job aids:
  - Glossary of Archibus Data Fields: http://space.ucsf.edu/sites/space.ucsf.edu/files/DataDefinitions.pdf
  - Room Type Reference Guide: http://space.ucsf.edu/sites/space.ucsf.edu/files/RoomTypeGuide.pdf

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Accessing the Space Update Form

Access the Space Update Form from the Home Page.

1. From the Home Page in the **Tasks** bucket at the top left, find the Space Update Form Task. Click on **Space Update Form**.

2. Space Update Form defaults to the **Active Space Update Room List** tab.

3. This list displays rooms currently being edited or recently submitted for category changes**.**

Note: For the Coordinator the list shows only your rooms. The Strategist can see the status of all rooms being edited under their Control Point.

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Space Update Form Process Steps
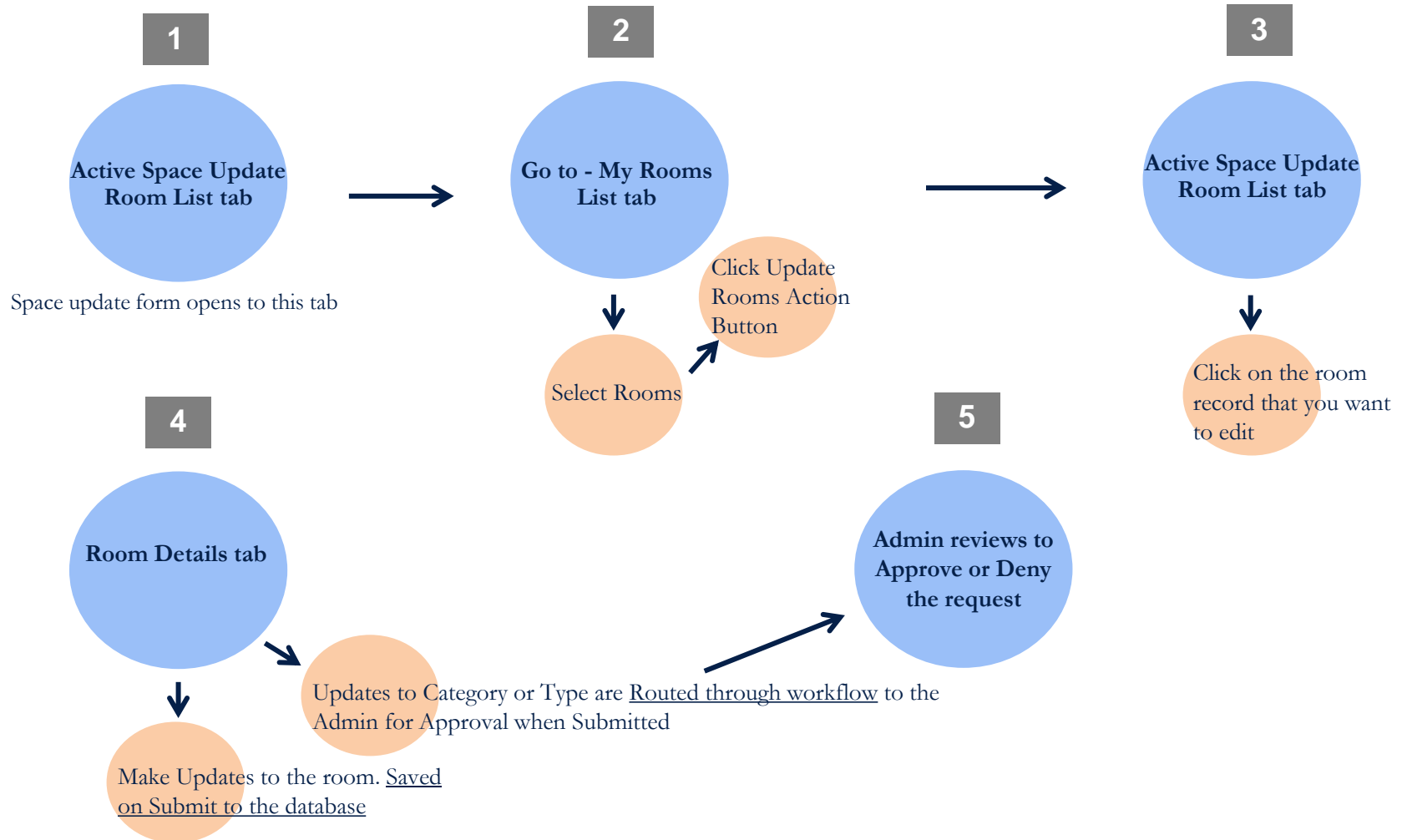
- Coordinator/Strategist:

  1. Go to **My Room List tab**, select the rooms you wish to edit and click the Update Rooms action button

     - You can use this page to add a Note and Save without going into the Room Details tab

  2. Go to **Active Space Update List tab** and click on room record that you want to edit

  3. Go to **Rooms Detail tab** to

     - make edits then save and submit your changes. Edits that **do not include** Category/Type changes are not routed through workflow but saved immediately

       - Category/Type edits are submitted into workflow for Admin review
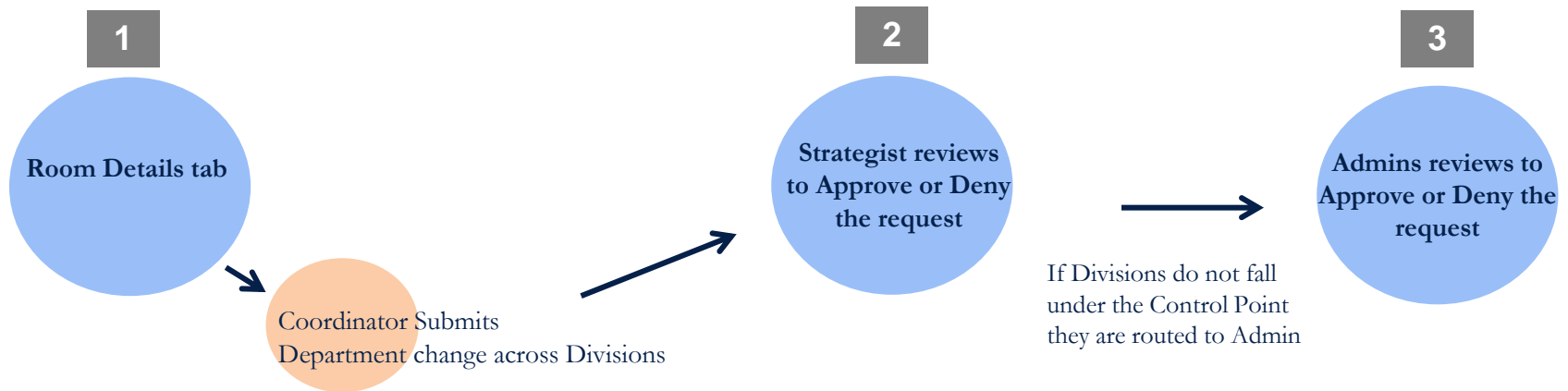
- Auto-Notifications

  - Email Notification is forwarded to originator if the proposed change is declined.

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Space Update Form – Simple Workflow

1

Active Space Update Room List tab

Space update form opens to this tab

2

Go to - My Rooms List tab

Select Rooms

Click Update Rooms Action Button

3

Active Space Update Room List tab

Click on the room record that you want to edit

4

Room Details tab

Make Updates to the room. Saved on Submit to the database

Updates to Category or Type are Routed through workflow to the Admin for Approval when Submitted

5

Admin reviews to Approve or Deny the request

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Space Update Form – Exception Workflow

1

Room Details tab

2

Strategist reviews to Approve or Deny the request

3

Admins reviews to Approve or Deny the request

Coordinator Submits Department change across Divisions

If Divisions do not fall under the Control Point they are routed to Admin

Note: Coordinator should notify the Strategist when submitting this type of change

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My Room List tab

Space Update Form

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My Rooms List tab- Overview

- The My Room List tab displays rooms that you have access to edit

  - For Strategists – all rooms within your Control Point

  - For Coordinators - Based on your DeptID access rights

  - Includes "SHARED" space assignments

- From the My Room List tab you can:

  - Edit the Notes field

  - View floor plan drawings

  - Select rooms to move to the Active Space Update Room List to make available for editing

  - Access the Replace PI feature

  - Select Fields to re-order and hide/display the columns

  - Download the My Room List to Excel

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My Room List tab- Navigation

1. To navigate to the My Room List tab click on the tab at the top of the Space Update Form view.

2. Filter this list utilizing any of the filters available at the top of each column. Enter in desired filter criteria and hit enter to restrict the list accordingly.

3. A status of **Not Started** indicates a room that can be selected to start the update process. Other statuses of **In Progress** and **Submitted** are not selectable as they are in process.

4. The checkboxes allow you to select multiple rooms at once. **The top box selects all.**

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My Room List tab- View Floor plans

1. Click on the **Floor Plan Icon** to bring up the drawing for the building/floor desired.

2. The floor plan is displayed, the room selected is highlighted in yellow.

3. Click on the **Close** button to close the floor plan window.

My Room List tab- Download to XLS

You can download your Room List information to Excel by clicking on the **Download XLS** button on the **My Room List** view.

1. Click on the **Download XLS** to download an Excel file to your computer (the location downloaded and method of displaying the download will differ depending on which browser being used).

2. The result will be an Excel spreadsheet with your current Room List and associated data.

Note: the download will display all of your rooms not just those selected.

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My Room List tab- Edit Notes

1. Find the Edit Notes column and click the icon for the room you'd like to edit.

2. The Edit Notes window opens and the Notes field is available for editing.

3. Click **Save** to save your notes for the room. Click **Cancel** to exit the edit notes window without saving.

Note: If you only wish to add a note you can do it here without following the process to update the room

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My Room List tab- Select to Update

1. Make sure all rooms you wish to work on have been selected.

2. Click on the **Update Rooms** button to add all of the selected rooms to your **Active Space Update Room List**.

3. All of your selected rooms will show up in the **Active Space Update Room List** and their status will change to **In Progress** in the **My Room List** tab.

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Active Space Update Room List tab

Space Update Form

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Active Space Update Room List tab- Overview

- The **Active Space Update Room List tab** displays rooms that you, or another user with edit access to the same rooms is editing.

  - The list shows rooms that are in the status of: In Progress and Submitted- Pending Approval

- In the **Active Space Update Room List tab** you can:

  - Access the **Room Details tab** to edit a room's data

  - **Submit** edits to a room

  - **Withdraw** a room from the Active List tab and move it back to My Rooms List tab

  - Access the **Compare** Proposed Changes window

  - **Select Fields** to re-order and hide/display the columns

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Active Space Update Room List tab- Navigation

1. Click on the **Active Space Update Room List** tab to access all of the rooms awaiting action.

2. To select a single room for review/edit, click anywhere on room row where the mouse arrow changes to a hand (i.e. Status, Building Code, Building Name, etc.).

3. Once selected the chosen room opens in the **Room Details** tab.

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Active Space Update Room List tab- Action Buttons

1. To Submit/Withdraw multiple rooms in the **Active Space Update Room List** click in the appropriate check boxes for all rooms you wish to take a particular action for. The top most check box will check all that aren't grayed out.

   NOTE: If a box is grayed out, it is not selectable to Submit from this form indicating that it may be not be correctly updated and should be reviewed.

2. Click on the **Submit** button at the top right of the Room Details view. Room(s) just submitted will move to the Admin Work Queue, status will be **Approved by Space Strategist** in **My Room List.**

3. If not wishing to submit the rooms checked for approval click on the **Withdraw** button. Status for the room just withdrawn will be **Not Started**, and the room will move back to the My Rooms List.

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Space Update Form- Statuses you will see

Status	Definition	Corresponding tracking fields
Not Started	Room has not been moved to Active List and no pending update approvals;	
In Progress	When Coordinator or Strategist moves a room record from My Rooms List to Active Space Update Room List in the Space Update Form, by clicking the Update Rooms button.	**Started By** and **Date Started**
Submitted- pending approval	When Coordinator clicks Submit from the Room Details tab on rare cases when they have edit access to more than one the Division. Note: In this status, room can still be edited by Coordinators with access to the room.	**Updated By** and **Date Updated**
Submitted	• When Coordinator or Strategist clicks the Submit button in the Room Details tab for Room Category/Type data changes. • When Coordinator or Strategist clicks the Submit button in the Room Details tab to save a change to their room.	**Updated By** and **Date Updated** **Reviewed By** and **Date Reviewed** (when Strategist clicks Submit button only)

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Room Details tab

Space Update Form

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Room Details tab- Overview

- The **Room Details tab** displays the detailed room information that is available to you for editing

- In the Room Details tab you can:

  - **View detailed information** about the room

  - **Edit data** for the room

  - **Use action buttons** to:

    – Save data field changes

    – Submit data changes

    – Withdraw the room and return it back to the My Rooms List

  - Access the **Compare** Proposed Changes window

  - View **SIS Temp Notes**

  - **Select Fields** to re-order and hide/display the columns

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Room Details tab- Orientation

1. **Room Information** panel

2. **Department/PI Splits** panel

3. **Occupancy** panel

4. Gear Cog icon menu options

5. Action buttons

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Room Details tab- Room Information panel

Room Information is the top most details panel of the Room Details tab. Data can be viewed and edited.

1. To view graphical representation of the room's location in a floor plan, click on the **floor plan Icon** in the **Room Information** panel.

2. The **Room Locator** window opens.

3. The room's location is highlighted in yellow on the rendered floor plan.

4. Once you have completed viewing the floor plan information, click on the **Close** button to close the window and return to the previous view.

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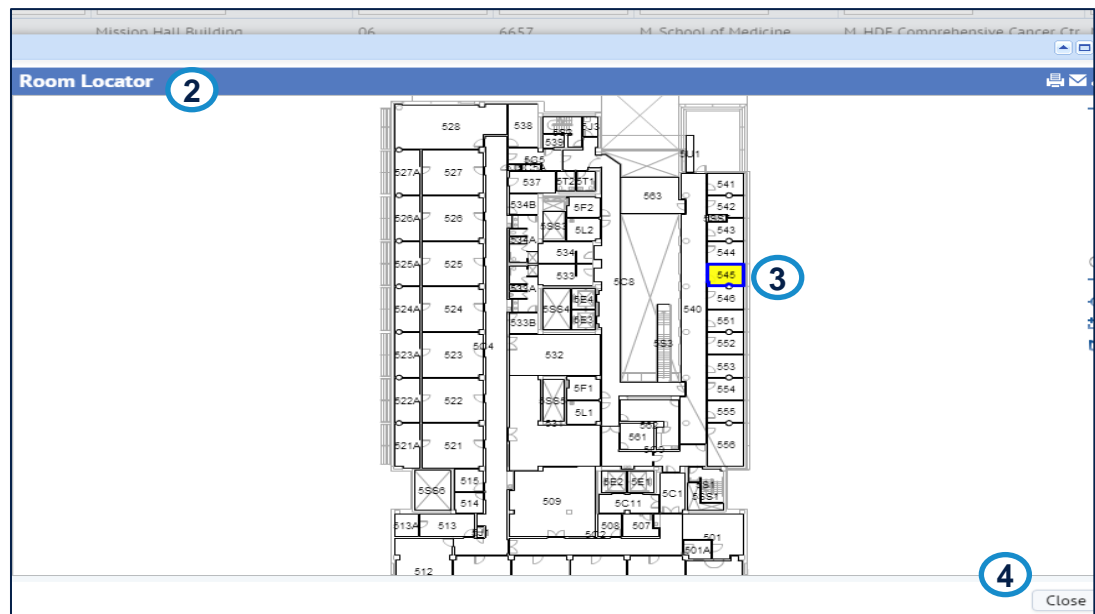
Room Details tab- Editing Room Category & Room Type

1. To edit the displayed rooms information click on the **Pencil Icon** in the **Room Information** section.

2. The **Edit Category, Type and Notes** window opens.

3. To alter the existing **Room Category or Type** click on the ellipsis button in either field and choose an alternative value in the Select Values window.

4. Enter free form text in the **Notes** field as needed.

5. Once your edits are complete, click the **Save** button to keep your changes. Click the **Cancel** button if do not wish to keep your edits

Note: Notes changes will not automatically save to the data base if Category or Type changes are submitted at the same time. They will be submitted into workflow for Admin approval.

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Room Details tab- Editing Room Category & Room Type

- To update the Room Type, first select the Room Category.

  - Room Types are made available based on the Category selected.

  - If you select the Type field first, you will be limited to the Category for the associated type.

  - Category values are prefixed with a "C-" to indicate a Campus category versus a Medical Center category.

Room Category	Description
C-ACAD OFC	Campus- Academic Office
C-ADMIN	Campus- Administration
C-CEN SERV	Campus- Central Services & Facilities
C-CLIN HOSP	Campus- Clinical/Hospital
C-DRY LAB	Campus- Dry Lab
C-HOUSING	Campus- Residential Facilities
C-RENOVATION	Campus- Space under Renovation
C-STUDENT	Campus- Student
C-WET LAB	Campus- Wet Lab
C-WETLAB SUP	Campus- Wet Lab

Select Value - Room Category

Close

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More About Room Category and Room Types

Why do we assign Room Types to UCSF rooms?

- Room Type reflects the primary, or predominant, use of the space in terms of "activity" that is served by the room. Room Type is tracked for internal understanding of how UCSF uses its space as well as for reporting to UCOP.

What is a "SUP" (support) room?

- A room that directly supports one or more named room types as an extension of the activities in those rooms and which is not intended as a permanent work station area. *IF* it is adjacent to and supports the named room use type room, *then* it's a SUP/support room. For example, a closet that supports an adjacent Administrative Office (ADMIN OFFICE) is an Administrative Office- Support room (ADMIN OFC SUP).

How do I identify the *primary* Room Type?

- Multiple activities may be happening in the same room. In these cases, select the activity (and corresponding Room Type) that is conducted in the room for the most amount of time.

- If all activities in the room occur in equal amounts of time, then select the Room Type for the activity that is the most important to report. For example, if a room is used as a storage closet and a student study area, the student study area is the most important to report because we know that students may be located in this space at any given time.

- **For more information,** go to the **Room Type Reference Guide:** http://space.ucsf.edu/sites/space.ucsf.edu/files/RoomTypeGuide.pdf

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Room Details Tab- Department/PI Splits panel- Add Dept/PI Splits

1. To add a Department/PI Split click on the **Add New** button at top right of the Department/PI Splits panel.

2. The **Department/Split** window opens.

3. To add information for a new split, edit each field by hovering over the far right of the field to access the Select Value feature.
   - ***Division/Department fields** are required.
   - **Percentage of Space** field is open text field to enter correct percentage for this split.
   - **PI Name field** is required for 4 research-related Room Types (Wet Lab, Wet Lab SUP, Dry Lab, Dry Lab SUP). If no value is chosen, then PI Assignment Pending value default populates the field.

4. Once you have completed your edits, click on the **Save** button to keep changes. Click the **Cancel** button if you do not wish to keep your changes.

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Room Details tab- Department/PI Splits panel- Edit/update Percentage of Space change

1. To edit/update the **Percentage of Space** for all splits go to the Department/PI Splits section.

2. To remove a department/PI split, click on the **X in the Delete column**.

3. The **Percentage of Space** Fields are on the right side of the row. Place your cursor in fields and update percentages as needed
   - **Note:** Total for all splits must add up to 100%.

4. When your edits to the percentages are complete, click on the **Save** button to retain the changes. Click **Submit** to update the database.

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Room Details tab- Department/PI Splits panel-
Flag Space as Banked or Hotel

1. The **Banked** flag is used at the control point level to indicate assigned space that currently has no employees or PIs assigned to it and has an intended future use.

2. The **Hotel** flag is editable by Strategists and indicates space that is being used for hoteling.

Note: The Strategist is required to follow the Space Update process to actively edit the room information. The flag is changed from No to Yes to indicate a Banked and or Hotel Space. When submitted, the change is updated to the database immediately.

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Room Details tab- Department/PI Splits panel- Add Loan Information

1. Click on **Loan Info Icon** at far right of each row in **Department/PI Splits** section to add loan information.

2. The **Loan Information** window opens to edit.

3. To add selections for **Loaned From Division Name** and the **Date Loaned Start/End** dates hover over the far right of the respective fields for the selection boxes. Filter in these boxes as needed and choose appropriate choice by clicking on your selection.
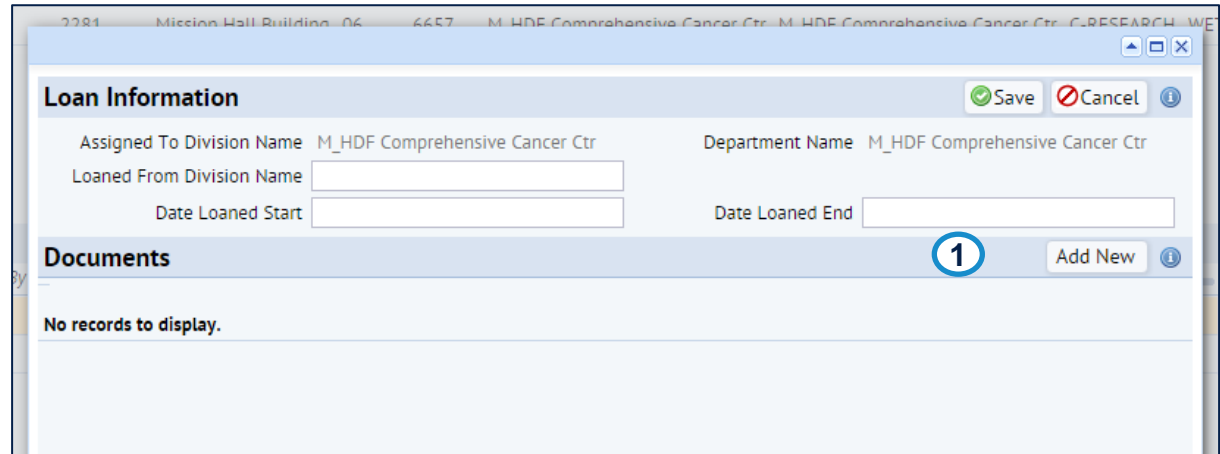
4. When done entering appropriate information. Click the **Save** button to retain information. Click **Cancel** to not save your changes.

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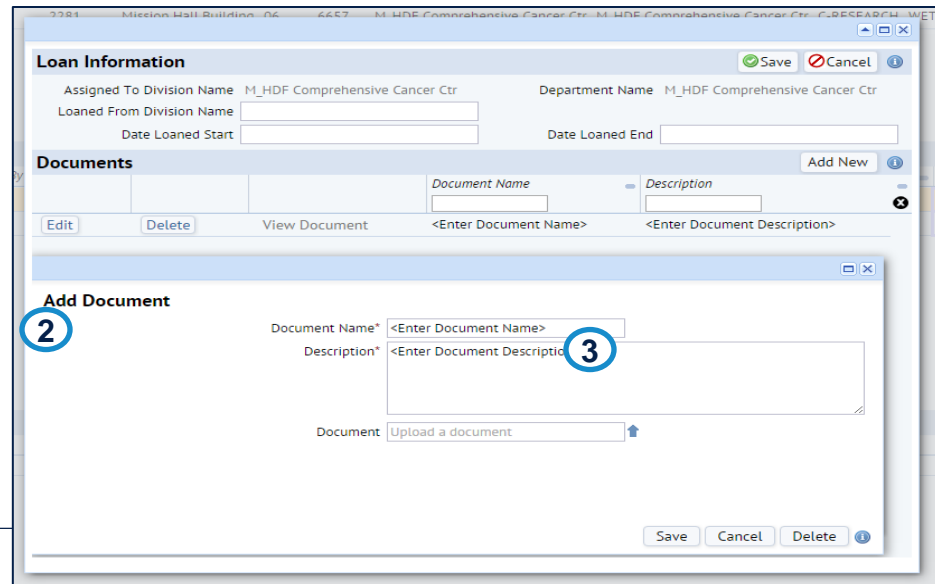
Room Details tab- Department/PI Splits panel- Add Loan Documents

1. To add Loan documentation click on the **Add New button** at far right of the **Documents** section in the **Loan Information** window.

2. The **Add Document** window opens to attach documents for this particular loan.

3. To add selections for **Document Name** and the **Description** (both Required) place cursor in respective field and type text. This will be saved for viewing in list on **Loan Information** window.

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Room Details tab- Department/PI Splits panel
Add Loan Documents, cont.

1. To upload a supporting document click on the **Up Arrow Icon** to the right of the **Document** field in the **Add Document** window.

2. The **Check In New Document** window opens to attach files from your computer for this particular loan.

3. To choose the appropriate file to upload, click on the **Choose File button.** A File Explorer window opens to allow you to locate and select the correct file. Once selected, click the Open button and the file name will populate beside the **Choose File button .** Type in **Description** field as needed.

4. Click the **OK button** when done.

Note: It is recommended to keep the **Set Lock Status** in the default status of **Unlocked.**

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Room Details tab- Occupancy panel

1. To view or add occupancy information for the selected room go to the Occupancy panel at bottom of Room Details tab. To add someone new to the room who is located somewhere else. Click the **Add New** button at far right.

2. The **Add New Occupancy Record window** opens to allow you to search and select an employee stored in the system, as well as indicate if this is the employee's primary location. Click on the ellipsis button in the Employee Name field to open a new window to conduct a search for the employee.

3. The **Select Value – Employee** window opens. Filter as needed and click on appropriate name to populate Employee Name field.

4. Click **Save** when done. The employee location change is saved immediately to the database and interfaced to other systems

Room Details tab-
Additional Occupancy information

- An employee's primary position will by systemically removed from their current location when the employee is assigned to a new location as their primary location

  - If you delete an employee from their primary location without reassigning them they will be orphaned and appear on an error report for Campus Planning to follow-up

- An Employee can have only one primary location

  - Archibus sends an employee's primary location to other downstream systems.

  - Employee locations flagged as No (not primary employee location) are not interfaced to other systems

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Room Details tab- Occupancy panel
Non-Primary Location or New Location Unknown

1. To remove a non primary occupant for the selected room go to the **Occupancy** section at bottom of Room Details and click the check boxes of each you wish to remove. Clicking on the top most check box will check all of them at once.

2. With correct boxes checked now click on the **Remove** button.

3. The **Confirm** window opens.

4. Click on the **Yes** button to confirm *and remove* the selected employee(s) information from this room. Click on the **No** button to not remove the checked employee(s).

***Note**: Occupancy changes occur *immediately* in the database**.**

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Room Details tab- SIS Temp Notes

1. From the **Gear cog icon** of the Room Details tab, select the **SIS Temp Notes**.

2. The **SIS Temporary Notes window** opens. This window provides read only data for 3 fields from SIS that were NOT migrated to Archibus: Primary Occupant, Contacts, PI Room Notes.

Note: This window will be available for 9-12 months from April 2016 to help users transition to the new Archibus system.

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Room Details tab- Action Buttons

1. When all of your edits are completed, click on the **Submit** button at the top right of the Room Details tab.

2. If you do not wish to submit your changes , the **Withdraw** button will return the room to My Rooms List tab in a status of **Not Started**.

3. The **Cancel** button returns the room to the **Active Space Update Room List** view and status for the room stays **In Progress**.

Room Details tab- Action Buttons, cont.

1. To view differences between the current room info/PI Splits and the proposed changes click on the **Compare Icon** in the **Room Information** section.

2. The **Compare Proposed Changes** window opens.

3. The Current and Proposed information is displayed for viewing.

4. Once done viewing Current/Proposed information click on the **Close** button to close the window and return to previous view.

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My Room List tab- Replace PI

Space Update Form

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My Rooms List- Replace PI

1. Click on the **My Room List** tab.
2. The **Replace PI** button is at the top right of the view. Click on the Replace PI icon.
3. The **Replace PI** view window opens allowing you to start the process.
4. To close or minimize this view utilize the **Minimize/Close** icons at the top right of this view.

Note: Read the text displayed that provides additional on instructions how to Select PI to Replace

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My Rooms List- Replace PI, cont.

1. Start by selecting your current PI. Hover over the far right of the **Current PI** field and click on the ellipsis button that appears.
2. The **Select Value – Current PI** window opens for you to filter as needed to locate your choice.
3. Click on the line containing the name of your current PI that you wish to replace. This will populate the **Current PI** field.
4. To close this window without choosing a PI click on the **Close** button at the bottom right.

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My Rooms List- Replace PI, cont.

5. The PI you selected to replace is shown in the Current PI field.
6. The rooms currently assigned to that PI will display in a list in the **Rooms to Reassign** section.
7. To select the appropriate rooms to reassign to a new PI, click the check boxes. The top most check box will check all available rooms when checked.
8. If you do not wish to make changes at this time click on the **Close** button.

Note: Only Rooms in a Not Started Status can be selected to Replace PI because the may be under edit

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My Rooms List- Replace PI, cont.

9. Your choices of rooms to reassign must each be checked.
10. Hover over the far right of the **PI Name** field and click on the ellipsis button to bring up the window of PI names and click on the desired one to replace the current PI. The PI name will populate the field once chosen.
11. Hover over the far right of the Date Occupancy field and click on the calendar icon to bring up the Calendar window and choose a date.

Note: You are limited to todays date or a past date. Future dates re not allowed.

My Rooms List- Replace PI, cont.

12. When completed with your changes, click the **Save** button at the bottom right.

13. A popup message will appear confirming your successful edit. Click on the **OK** button to acknowledge save. The room(s) previously checked have their check box(es) grayed out now.

14. You can now make other replacements of the rooms in the list by checking those boxes as desired. Click the **Close** button to exit the **Replace PI** function.

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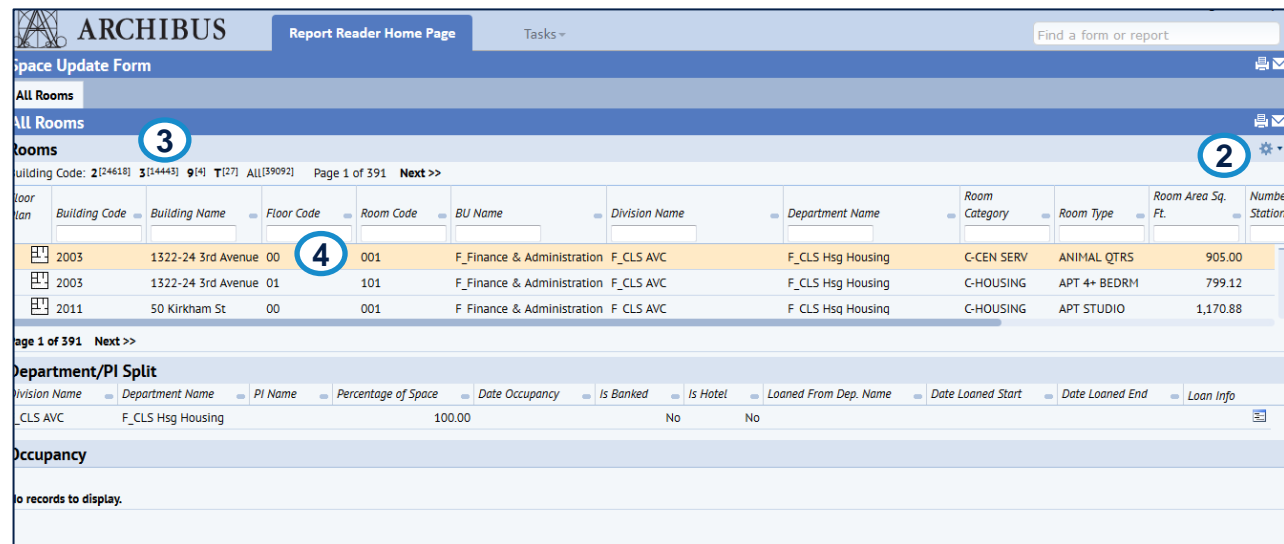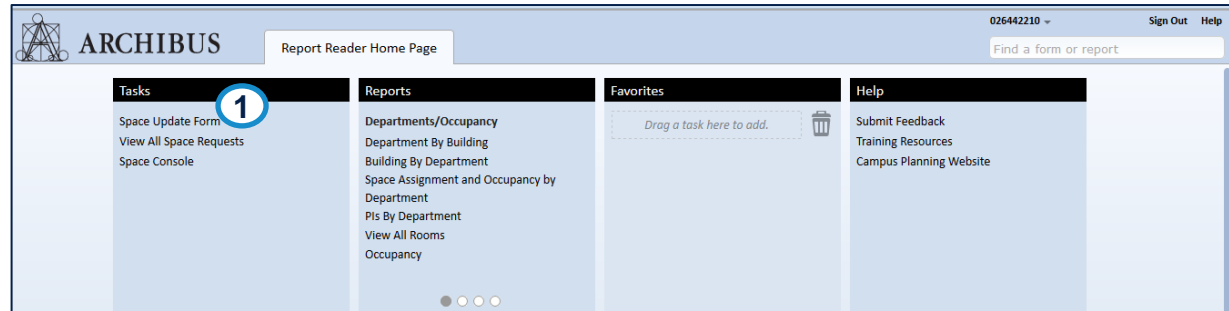
All Rooms Tab

Space Update Form

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Overview of the All Rooms tab of the Space Update Form

The **All Rooms** view provides a place for you to view the Department/PI Split and Occupancy details of any room within the system.

1. To access the view click on the **Space Update Form** link in the Tasks bucket at the top of the homepage.
2. Utilize the Gear Cog Icon to select the columns you want to view.
3. To filter list utilize the Index Filter for the Building Code OR each column has a filter at the top to type text in to restrict the selections as needed. The symbol to sort ascending/descending is available for each column as well.
4. Once you have found the room in the list for which you wish to view additional information, click anywhere on that line to open it.

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Overview of the All Rooms tab of the Space Update Form, cont'd

5. The room chosen has the line highlighted.
6. With room chosen a section opens displaying the **Department/PI Split** information.
7. **Occupancy** section also opens displaying any employee occupancy information, if available.

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You have completed the module

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