

# How to Use the Space Update Form

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# Overview of the Space Update Form

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Use the table of contents hyperlinks to navigate within the module

# 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):

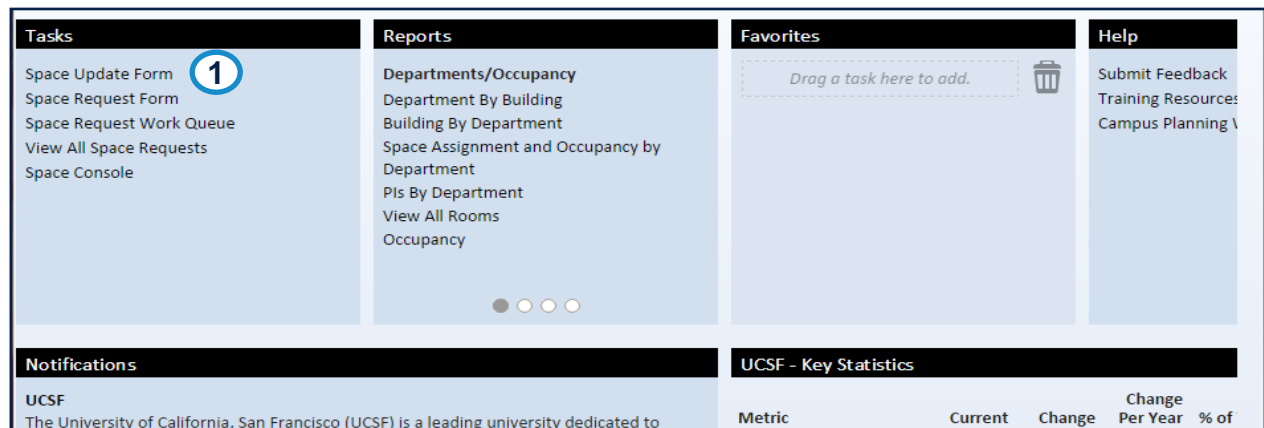
- Some data edits are **saved immediately** to the database:
  - Notes
  - PI Name
  - Department Name if within the same department
  - Loan information
- Some data edits are **routed for approval** through workflow:
  - Room Category and Type changes are routed for approval to the System Admin
  - 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>

# 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.



The screenshot shows the 'Space Update Form' interface. The 'Active Space Update Room List' tab is selected. The table displays a list of rooms with columns for Status, Floor Plan, Compare, Updated By, Building Code, Building Name, Floor Code, and Room Number. The first row is highlighted with a blue circle '2' around the 'Active Room Information' header. The second row is highlighted with a blue circle '3' around the 'In Progress' status. The table contains 7 rows of data.

Status	Floor Plan	Compare	Updated By	Building Code	Building Name	Floor Code	Room Number
In Progress	[Icon]	[Icon]	[Icon]	3002	Genentech Hall	02	N2
In Progress	[Icon]	[Icon]	[Icon]	3002	Genentech Hall	02	N2
In Progress	[Icon]	[Icon]	[Icon]	2036	1701 Divisadero, MOB 2	05	53
In Progress	[Icon]	[Icon]	[Icon]	3034	Byers Hall	05	50
In Progress	[Icon]	[Icon]	[Icon]	3034	Byers Hall	05	50
In Progress	[Icon]	[Icon]	[Icon]	2316	Helen Diller Family Cancer Research	03	35
In Progress	[Icon]	[Icon]	[Icon]	2316	Helen Diller Family Cancer Research	03	32

# Space Update Form Process Steps

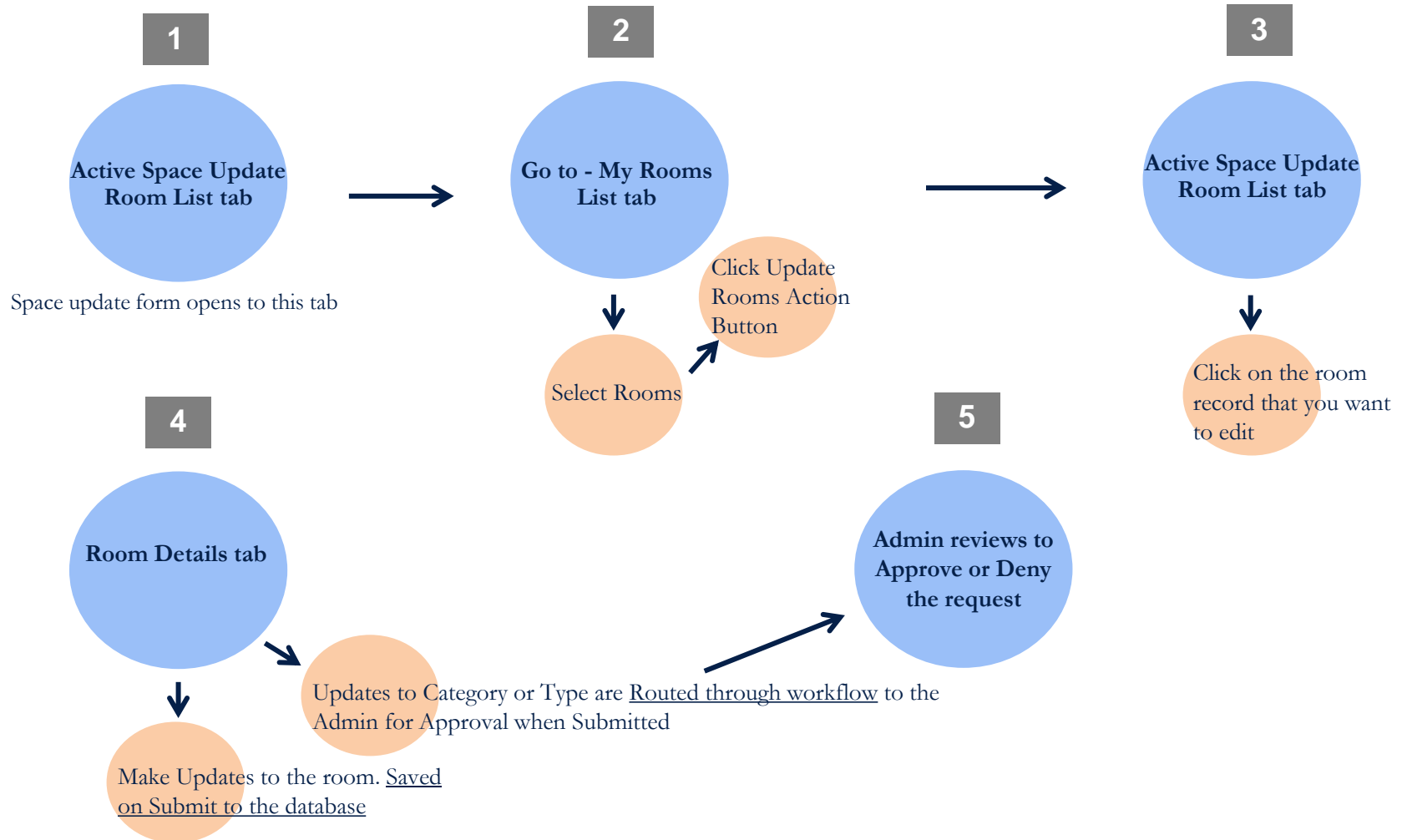
## ■ Coordinator/Strategist:

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

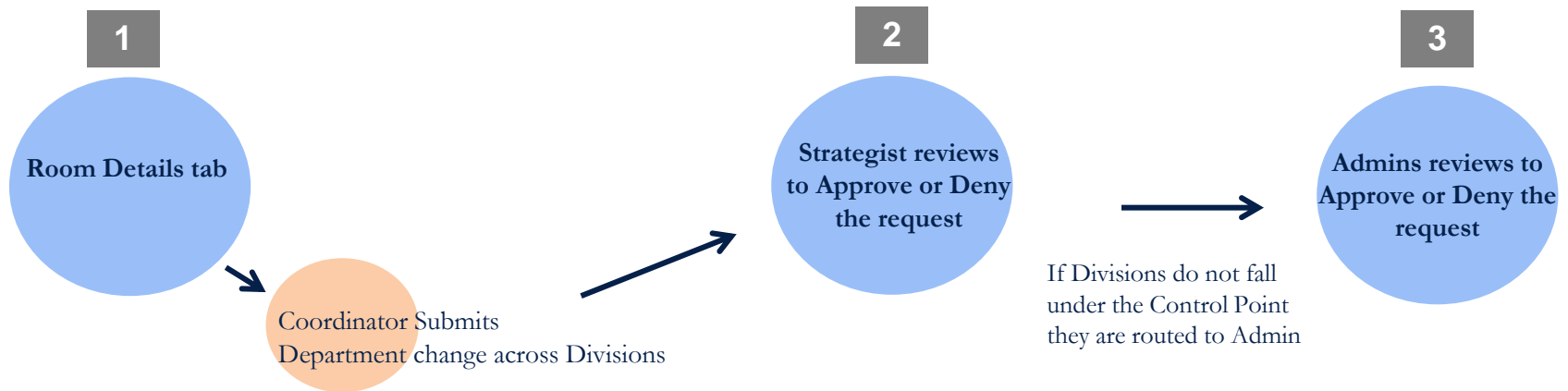
## ■ Auto-Notifications

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

# Space Update Form – Simple Workflow



# Space Update Form – Exception Workflow



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

# My Room List tab

Space Update Form



# 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

# 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.**

**Space Update Form**

**My Room List** 1 | Live Space Update Room List | Room Details | All Rooms

**Room Information** | Replace PI | Download XLS | Update Rooms | ⚙️










Building Code: 2[6017] 3[3285] All[9302] | Page 1 of 94 | Next >>

<input type="checkbox"/>	Status							
<input type="checkbox"/>	In Progress		2011	50 Kirkham St	01	101	SHARED	SHARED
<input type="checkbox"/>	In Progress		2012	Kalmanovitz Library	01	144	SHARED	SHARED
<input type="checkbox"/>	In Progress		2252	Medical Science Building	13	1328	M_School of Medicine	M_Anator
<input type="checkbox"/>	Not Started	2252	Medical Science Building	13	1331	M_School of Medicine	M_Anator	
<input type="checkbox"/>	Approved by Space Strategist		2252	Medical Science Building	13	1332	M_School of Medicine	M_Anator
<input type="checkbox"/>	Approved by Space Strategist		2252	Medical Science Building	13	1333	M_School of Medicine	M_Anator
<input type="checkbox"/>	Not Started		2252	Medical Science Building	13	1334	M_School of Medicine	M_Anator

# 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.

The screenshot displays the 'Space Update Form' interface. At the top, there are tabs for 'My Room List', 'Active Space Update Room List', 'Room Details', and 'All Rooms'. Below the tabs is a 'Room Information' section with a table of room data. The table has columns for Status, Floor Plan, Building Code, Building Name, Floor Code, Room Code, BU Name, and Division. The row for room 101 is highlighted in yellow. A circled '1' points to the 'Floor Plan' icon in the 'Floor Plan' column of this row. Below the table, a 'Room Locator' window is open, showing a floor plan with a circled '2' pointing to a specific room. A circled '3' points to the 'Close' button in the bottom right corner of the 'Room Locator' window.

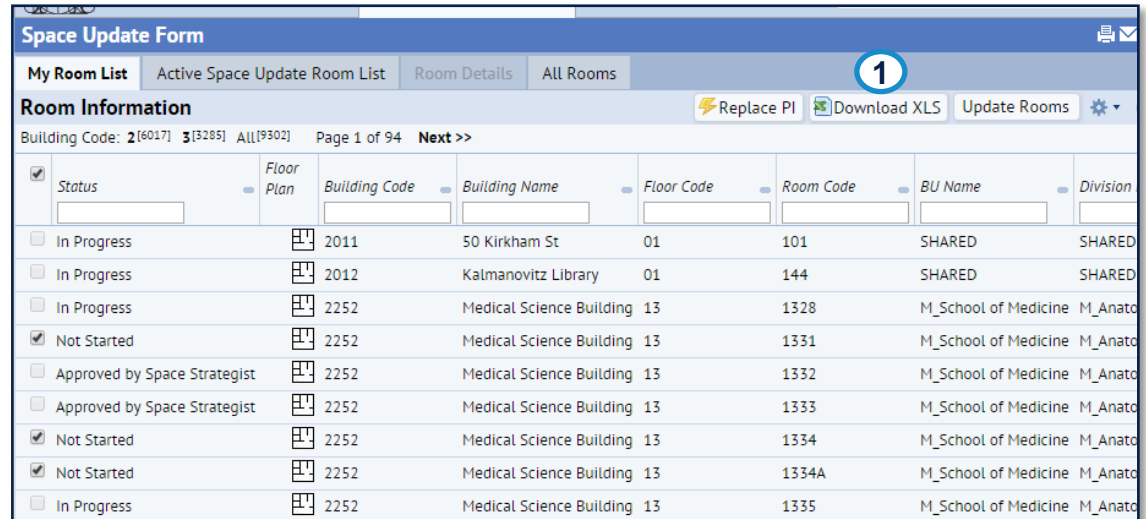
Status	Floor Plan	Building Code	Building Name	Floor Code	Room Code	BU Name	Division
<input type="checkbox"/> In Progress		2011	50 Kirkham St	01	101	SHARED	SHARED
<input type="checkbox"/> In Progress		2012	Kalmanovitz Library	01	144	SHARED	SHARED
<input type="checkbox"/> In Progress		2252	Medical Science Building	13	1328	M_School of Medicine	M_Anato
<input checked="" type="checkbox"/> Not Started		2252	Medical Science Building	13	1331	M_School of Medicine	M_Anato
<input type="checkbox"/> Approved by Space Strategist		2252	Medical Science Building	13	1332	M_School of Medicine	M_Anato
<input type="checkbox"/> Approved by Space Strategist		2252	Medical Science Building	13	1333	M_School of Medicine	M_Anato
<input checked="" type="checkbox"/> Not Started		2252					
<input checked="" type="checkbox"/> Not Started		2252					
<input type="checkbox"/> In Progress		2252					

# 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.



Space Update Form

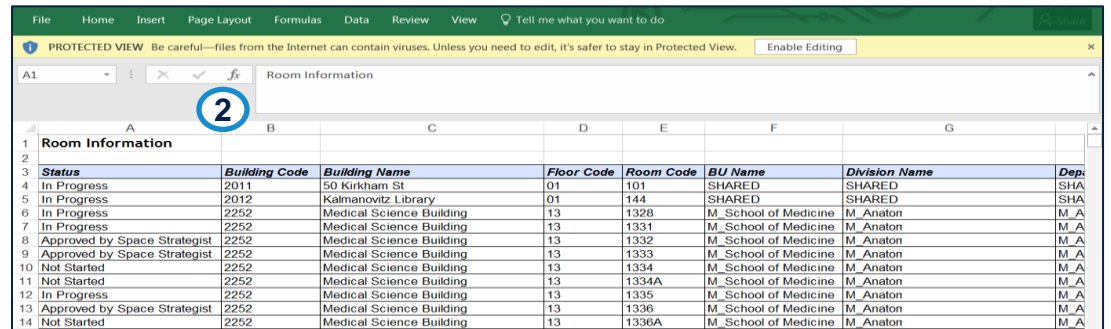
My Room List | Active Space Update Room List | Room Details | All Rooms

Room Information

Building Code: 2[6017] 3[3285] All[9302] Page 1 of 94 Next >>

Replace PI | Download XLS | Update Rooms

Status	Floor Plan	Building Code	Building Name	Floor Code	Room Code	BU Name	Division
<input type="checkbox"/> In Progress		2011	50 Kirkham St	01	101	SHARED	SHARED
<input type="checkbox"/> In Progress		2012	Kalmanovitz Library	01	144	SHARED	SHARED
<input type="checkbox"/> In Progress		2252	Medical Science Building	13	1328	M_School of Medicine	M_Anato
<input checked="" type="checkbox"/> Not Started		2252	Medical Science Building	13	1331	M_School of Medicine	M_Anato
<input type="checkbox"/> Approved by Space Strategist		2252	Medical Science Building	13	1332	M_School of Medicine	M_Anato
<input type="checkbox"/> Approved by Space Strategist		2252	Medical Science Building	13	1333	M_School of Medicine	M_Anato
<input checked="" type="checkbox"/> Not Started		2252	Medical Science Building	13	1334	M_School of Medicine	M_Anato
<input checked="" type="checkbox"/> Not Started		2252	Medical Science Building	13	1334A	M_School of Medicine	M_Anato
<input type="checkbox"/> In Progress		2252	Medical Science Building	13	1335	M_School of Medicine	M_Anato



File Home Insert Page Layout Formulas Data Review View Tell me what you want to do

PROTECTED VIEW Be careful—files from the Internet can contain viruses. Unless you need to edit, it's safer to stay in Protected View. Enable Editing

Room Information

Status	Building Code	Building Name	Floor Code	Room Code	BU Name	Division Name	Dep.
In Progress	2011	50 Kirkham St	01	101	SHARED	SHARED	SHA
In Progress	2012	Kalmanovitz Library	01	144	SHARED	SHARED	SHA
In Progress	2252	Medical Science Building	13	1328	M_School of Medicine	M_Anato	M_A
In Progress	2252	Medical Science Building	13	1331	M_School of Medicine	M_Anato	M_A
Approved by Space Strategist	2252	Medical Science Building	13	1332	M_School of Medicine	M_Anato	M_A
Approved by Space Strategist	2252	Medical Science Building	13	1333	M_School of Medicine	M_Anato	M_A
Not Started	2252	Medical Science Building	13	1334	M_School of Medicine	M_Anato	M_A
Not Started	2252	Medical Science Building	13	1334A	M_School of Medicine	M_Anato	M_A
In Progress	2252	Medical Science Building	13	1335	M_School of Medicine	M_Anato	M_A
Approved by Space Strategist	2252	Medical Science Building	13	1336	M_School of Medicine	M_Anato	M_A
Not Started	2252	Medical Science Building	13	1336A	M_School of Medicine	M_Anato	M_A

# 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

The screenshot displays the 'Space Update Form' interface. At the top, there are tabs: 'My Room List' (selected), 'Active Space Update Room List', 'Room Details', and 'All Rooms'. Below the tabs is the 'Room Information' section, which includes a summary of notes (2 [7645], 3 [4652], 6 [2], All [12299]) and pagination (Page 1 of 123, Next >>). The main table lists rooms with columns for Status, Floor Plan, Notes, Edit Notes, and Building Code. The first row is highlighted in yellow and has a circled '1' next to the 'Edit Notes' icon. An 'Edit Notes' window is open in the foreground, showing the 'Edit Notes' title bar with a circled '2', a 'Save' button with a green checkmark, and a 'Cancel' button with a red X. The window contains fields for Building Code (3052), Floor Code (05), and Room Code (A5158), followed by a large text area for Notes with a 500-character limit. The background table shows several rows of room data, including 'Medical Science Building' and 'M\_School of Medicine'.

# 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.

The screenshot shows the 'Space Update Form' interface. At the top, there are tabs: 'My Room List' (selected), 'Active Space Update Room List', 'Room Details', and 'All Rooms'. A circled '2' is next to the 'Update Rooms' button. Below the tabs, there's a 'Room Information' section with a 'Replace PI' button and a 'Download XLS' button. The main area is a table with columns: 'Status', 'Floor Plan', 'Building Code', 'Building Name', 'Floor Code', 'Room Code', 'BU Name', and 'Division'. A circled '1' is next to the 'Status' column header. The table contains several rows of room data. A circled '3' is next to the 'In Progress' status in the second row.

Status	Floor Plan	Building Code	Building Name	Floor Code	Room Code	BU Name	Division
<input type="checkbox"/> In Progress		2011	50 Kirkham St	01	101	SHARED	SHARED
<input type="checkbox"/> In Progress		2012	Kalmanovitz Library	01	144	SHARED	SHARED
<input type="checkbox"/> In Progress		2252	Medical Science Building	13	1328	M_School of Medicine	M_Anator
<input checked="" type="checkbox"/> Not Started		2252	Medical Science Building	13	1331	M_School of Medicine	M_Anator
<input type="checkbox"/> Approved by Space Strategist		2252	Medical Science Building	13	1332	M_School of Medicine	M_Anator
<input type="checkbox"/> Approved by Space Strategist		2252	Medical Science Building	13	1333	M_School of Medicine	M_Anator
<input checked="" type="checkbox"/> Not Started		2252	Medical Science Building	13	1334	M_School of Medicine	M_Anator
<input checked="" type="checkbox"/> Not Started		2252	Medical Science Building	13	1334A	M_School of Medicine	M_Anator
<input type="checkbox"/> In Progress		2252	Medical Science Building	13	1335	M_School of Medicine	M_Anator

# Active Space Update Room List tab

Space Update Form

# 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



# 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.

**Space Update Form** 1

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

Active Room Information Submit Withdraw

Building Code: 2 [26] 3 [9] All [35]

<input type="checkbox"/>	Status	Floor Plan	Compare	Updated By	Building Code	Building Name	Floor Code	Room Code
<input type="checkbox"/>	In Progress				2252	Medical Science Building	13	13
<input type="checkbox"/>	In Progress				3002	Genentech Hall	02	N2
<input type="checkbox"/>	In Progress				3002	Genentech Hall	02	N2
<input type="checkbox"/>	In Progress				2036	1701 Divisadero, MOB 2	05	53
<input type="checkbox"/>	In Progress				3034	Byers Hall	05	50
<input type="checkbox"/>	In Progress				3034	Byers Hall	05	50

**Space Update Form** 3

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

Room Information Compare Save Withdraw Submit Cancel

<input type="checkbox"/>	Edit	Status	Floor Plan	Updated By	Building Code	Building Name	Floor Code	Room Code	Division Name	Department Name
<input type="checkbox"/>		In Progress			2316	Helen Diller Family Cancer Research	03	356	M_HDF Comprehensive Cancer Ctr	M_HDF Compr

# 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.

ARCHIBUS Strategist Home Page Tasks Find a form or report

STRAT1 Sign Out Help

Space Update Form

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

Active Room Information

Building Code: 2 [26] 3 [9] All [35]

Submit Withdraw

Status	Floor Plan	Compare	Updated By	Building Code	Building Name	Floor Code	Room Number
In Progress				2252	Medical Science Building	13	13
In Progress				3002	Genentech Hall	02	N2
In Progress				3002	Genentech Hall	02	N2
In Progress				2036	1701 Divisadero, MOB 2	05	53
In Progress				3034	Byers Hall	05	50
In Progress				3034	Byers Hall	05	50

# Space Update Form- Statuses you will see

Status	Definition	Corresponding tracking fields
<b>Not Started</b>	Room has not been moved to Active List and no pending update approvals;	
<b>In Progress</b>	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.	<b>Started By</b> and <b>Date Started</b>
<b>Submitted- pending approval</b>	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.	<b>Updated By</b> and <b>Date Updated</b>
<b>Submitted</b>	<ul style="list-style-type: none"> <li>When Coordinator or Strategist clicks the Submit button in the Room Details tab for Room Category/Type data changes.</li> <li>When Coordinator or Strategist clicks the Submit button in the Room Details tab to save a change to their room.</li> </ul>	<b>Updated By</b> and <b>Date Updated</b>  <b>Reviewed By</b> and <b>Date Reviewed</b> (when Strategist clicks Submit button only)

# Room Details tab

Space Update Form

# 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

# 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

**Space Update Form**

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

Room Information **1**

Compare Save Withdraw Submit Cancel

Edit	Status	Floor Plan	Updated By	Building Code	Building Name	Floor Code	Room Code	Division Name	Department Name	Room Category
<input type="checkbox"/>	In Progress			2415	Mission Center Building	05	560	F_IT Info Tech Svcs	F_IT Info Tech Svcs	C-ADMIN

Department/PI Splits **2**

Add New

Delete	Edit	Status	Updated By	Division Name	Department Name	PI Name	Loaned From Division Name	Is Banked	Is Hotel	Percentage of Space	Loan
<input type="checkbox"/>	<input type="checkbox"/>	In Progress		F_IT Info Tech Svcs	F_IT Info Tech Svcs			No	No	100.00	

Occupancy **3**

Add New Remove

Name - Full	Email Address	Primary Employee Location
<input type="checkbox"/> Ezra Berger	Ezra.Berger@ucsf.edu	Yes
<input type="checkbox"/> Goshen Chan	Goshen.Chan@ucsf.edu	Yes
<input type="checkbox"/> Paul Sullivan	Paul.Sullivan@ucsf.edu	Yes
<input type="checkbox"/> Jill Goldsmith	Jill.Goldsmith@ucsf.edu	Yes

**4**

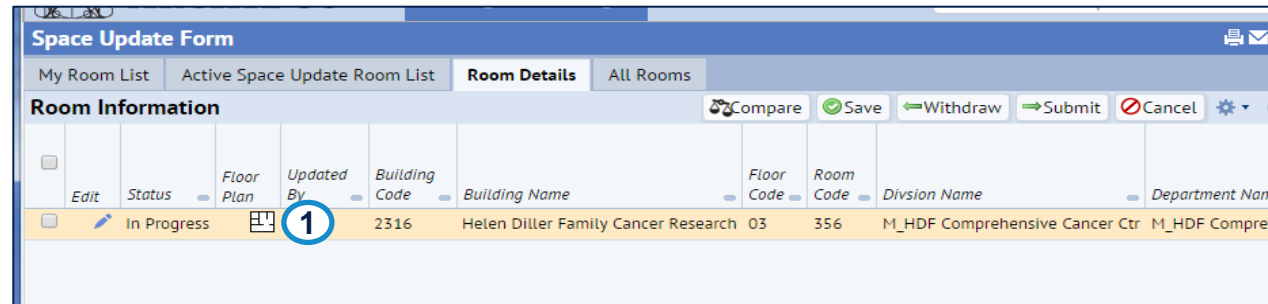
- Select Fields
- Submit Feedback
- Training Resources
- SIS Temp Notes

**5**

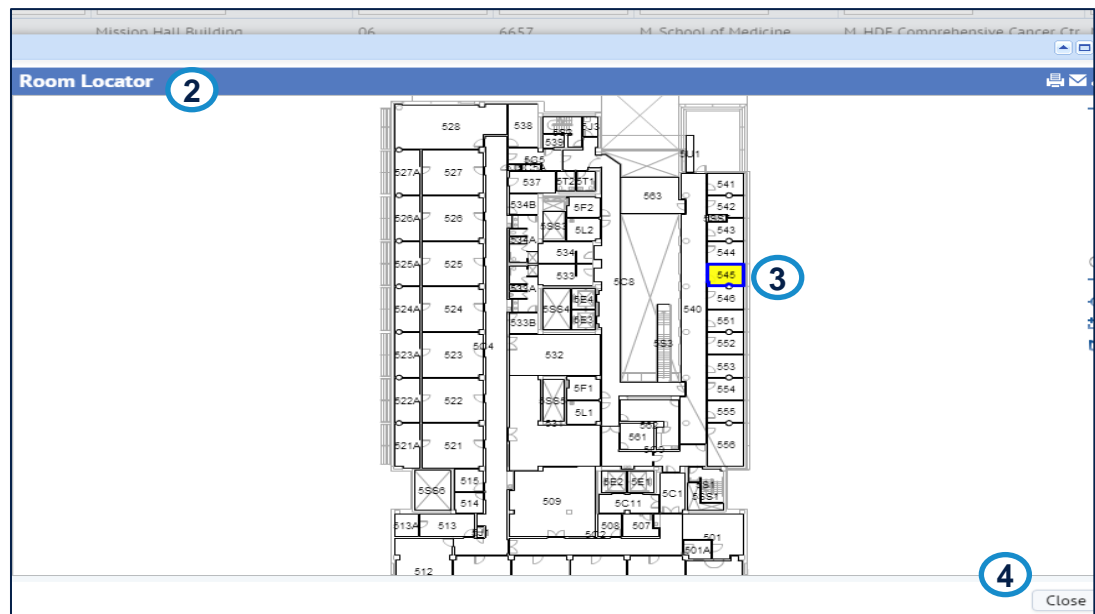
# Room Details tab- Room Information panel

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.



The screenshot shows the 'Space Update Form' with the 'Room Details' tab selected. The 'Room Information' panel is visible, showing a table with columns: Edit, Status, Floor Plan, Updated By, Building Code, Building Name, Floor Code, Room Code, Division Name, and Department Name. The first row of data is highlighted in orange and contains the following information: In Progress, 2316, Helen Diller Family Cancer Research, 03, 356, M\_HDF Comprehensive Cancer Ctr, M\_HDF Comple. A circled '1' points to the floor plan icon in the 'Floor Plan' column.



# 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.

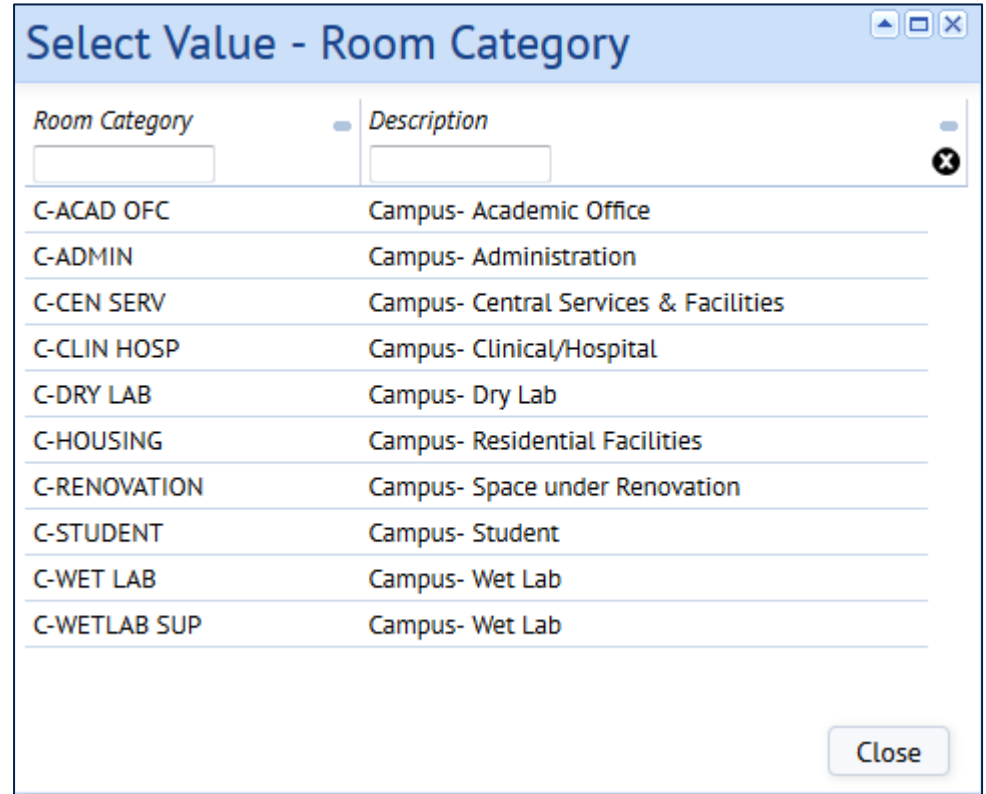
The screenshot shows the 'Space Update Form' with tabs for 'My Room List', 'Active Space Update Room List', 'Room Details', and 'All Rooms'. The 'Room Details' tab is active, displaying a table of room information. The table has columns for Edit, Status, Floor Plan, Updated By, Building Code, Building Name, Floor Code, Room Code, Division Name, and Department Name. The first row is highlighted in orange and contains the following data: In Progress, [Pencil Icon], 2316, Helen Diller Family Cancer Research, 03, 356, M\_HDF Comprehensive Cancer Ctr, M\_HDF Comprehensive Cancer Ctr. The pencil icon in the Edit column is circled with a blue '1'.

The screenshot shows the 'Edit Category, Type and Notes' window. It has fields for Room Category\* (C-RESEARCH), Room Type\* (WET LAB SUP), and Notes. The Notes field has a character count of 500. The Save button is circled with a blue '5'. The window also has a Cancel button and a Save button. The background shows the Room Information table from the previous screenshot.



# 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

# 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>

# 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.

ARCHIBUS Space Update Form

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

Room Information

Edit	Status	Floor Plan	Updated By	Building Code	Building Name	Floor Code	Room Code	Division Name	Department Name	Room Category	Room Type	Room Area Sq. Ft.	Number of Workstations	Availability	Date Updated	Date Started	Started By	Date Re
X	In Progress			2281	Mission Hall Building	06	6657	M_HDF Comprehensive Cancer Ctr	M_HDF Comprehensive Cancer Ctr	C-RESEARCH	WET LAB	40.00	1	-1	3/8/2016		Adelle Dow	

Department/PI Splits

Delete	Edit	Status	Updated By	Division Name	Department Name	PI Name	Loaned From Division Name	Is Banked	Is Hotel	Percentage of Space	Loan Info
X		In Progress		M_HDF Comprehensive Cancer Ctr	M_HDF Comprehensive Cancer Ctr			No	No	100.00	
X		In Progress						No	No	0.00	

Add New

Department/Split

Division Name\*

PI Name

Date Occupancy

Is Banked

Department Name\*

Percentage of Space

Status

Is Hotel

Save Cancel

# 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.

Space Update Form

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

Room Information

Edit	Status	Floor Plan	Updated By	Building Code	Building Name	Floor Code	Room Code	Division Name	Department Name	Room Category	Room Type	Room Area Sq. Ft.	Number of Workstations	Available
<input type="checkbox"/>	In Progress			2281	Mission Hall Building	06	6657	M_HDF Comprehensive Cancer Ctr	M_HDF Comprehensive Cancer Ctr	C-RESEARCH	WET LAB	40.00	1	

Department/PI Splits

Delete	Edit	Status	Updated By	Division Name	Department Name	PI Name	Loaned From Division Name	Is Banked	Is Hotel	Percentage of Space	Loan Info
<input type="checkbox"/>	<input type="checkbox"/>	In Progress		M_HDF Comprehensive Cancer Ctr	M_HDF Comprehensive Cancer Ctr			No	No	100.00	
<input type="checkbox"/>	<input type="checkbox"/>	In Progress						No	No	0.00	

# 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.

**Space Update Form**

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

Room Information

Edit	Status	Floor Plan	Updated By	Building Code	Building Name	Floor Code	Room Code	Division Name	Department Name	Room Category	Room Type	Room Area Sq. Ft.	Number of Workstations	Available
<input type="checkbox"/>	In Progress			2281	Mission Hall Building	06	6657	M_HDF Comprehensive Cancer Ctr	M_HDF Comprehensive Cancer Ctr	C-RESEARCH	WET LAB	40.00	1	

Department/PI Splits

Delete	Edit	Status	Updated By	Division Name	Department Name	PI Name	Loaned From Division Name	Is Banked	Is Hotel	Percentage of Space	Loan Info
<input type="checkbox"/>	<input type="checkbox"/>	In Progress		M_HDF Comprehensive Cancer Ctr	M_HDF Comprehensive Cancer Ctr			No	No	100.00	
<input type="checkbox"/>	<input type="checkbox"/>	In Progress						No	No	0.00	

1 2

**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.

# 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.

The screenshot displays the 'Space Update Form' interface. The top navigation bar includes tabs for 'My Room List', 'Active Space Update Room List', 'Room Details' (selected), and 'All Rooms'. The 'Room Details' tab is active, showing a table of room information. The table has columns for 'Edit', 'Status', 'Floor Plan', 'Updated By', 'Building Code', 'Building Name', 'Floor Code', 'Room Code', 'Division Name', 'Department Name', 'Room Category', 'Room Type', 'Room Area Sq. Ft.', and 'Number of Workstations'. A row is highlighted with the following data: 'In Progress', '2281', 'Mission Hall Building', '06', '6657', 'M\_HDF Comprehensive Cancer Ctr', 'M\_HDF Comprehensive Cancer Ctr', 'C-RESEARCH', 'WET LAB', '40.00', and '1'. Below the table is the 'Department/PI Splits' section, which contains a table with columns for 'Delete', 'Edit', 'Status', 'Updated By', 'Division Name', 'Department Name', 'PI Name', 'Loaned From Division Name', 'Is Banked', 'Is Hotel', 'Percentage of Space', and 'Loan Info'. A row is highlighted with the following data: 'In Progress', 'M\_HDF Comprehensive Cancer Ctr', 'M\_HDF Comprehensive Cancer Ctr', 'No', 'No', '100.00', and '1'. The 'Loan Info' column has a blue icon with the number '1' next to it. Below the 'Department/PI Splits' section is the 'Loan Information' window, which is open. The window has a title bar with 'Loan Information' and a blue icon with the number '2'. The window contains fields for 'Assigned To Division Name' (M\_HDF Comprehensive Cancer Ctr), 'Department Name' (M\_HDF Comprehensive Cancer Ctr), 'Loaned From Division Name' (empty), 'Date Loaned Start' (empty), and 'Date Loaned End' (empty). There are 'Save' and 'Cancel' buttons. Below the fields is a 'Documents' section with an 'Add New' button and a message 'No records to display.'.

Edit	Status	Floor Plan	Updated By	Building Code	Building Name	Floor Code	Room Code	Division Name	Department Name	Room Category	Room Type	Room Area Sq. Ft.	Number of Workstations
	In Progress			2281	Mission Hall Building	06	6657	M_HDF Comprehensive Cancer Ctr	M_HDF Comprehensive Cancer Ctr	C-RESEARCH	WET LAB	40.00	1

Delete	Edit	Status	Updated By	Division Name	Department Name	PI Name	Loaned From Division Name	Is Banked	Is Hotel	Percentage of Space	Loan Info
		In Progress		M_HDF Comprehensive Cancer Ctr	M_HDF Comprehensive Cancer Ctr			No	No	100.00	
		In Progress						No	No	0.00	

### Loan Information

Assigned To Division Name: M\_HDF Comprehensive Cancer Ctr

Department Name: M\_HDF Comprehensive Cancer Ctr

Loaned From Division Name:

Date Loaned Start:

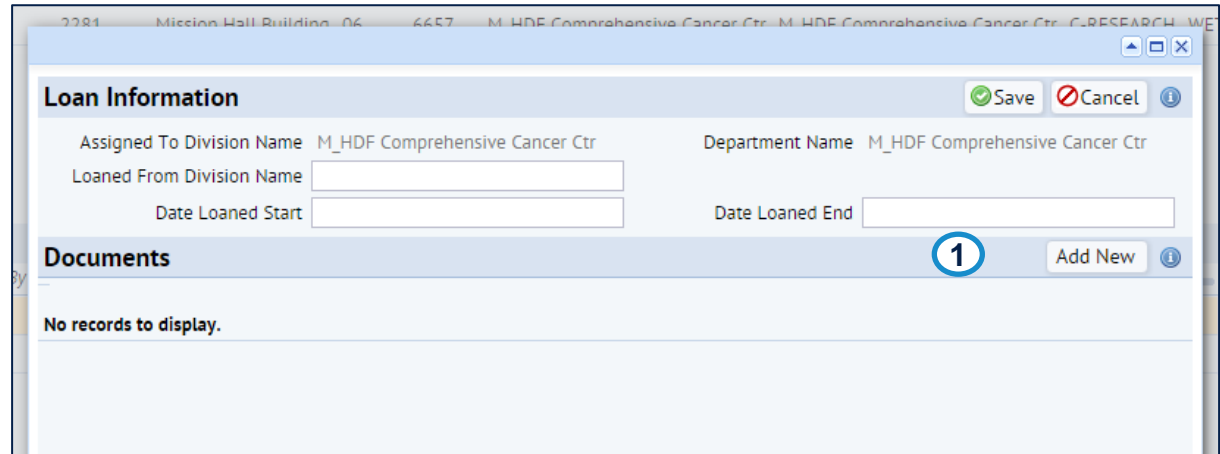
Date Loaned End:

### Documents

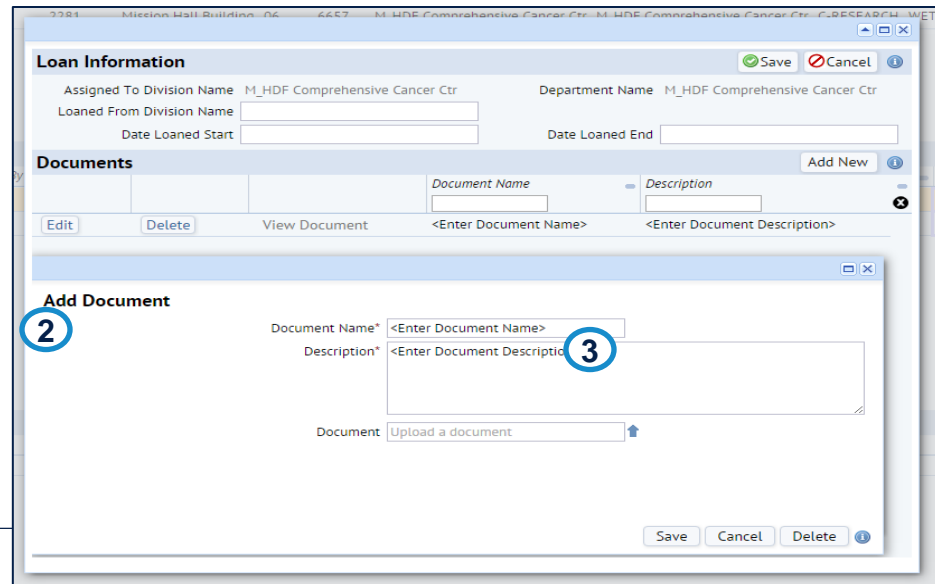
No records to display.

# 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.



The screenshot shows the 'Loan Information' window. The 'Documents' section is highlighted, and the 'Add New' button is circled in blue with the number 1. The window includes fields for 'Assigned To Division Name', 'Loaned From Division Name', 'Date Loaned Start', 'Department Name', and 'Date Loaned End'. The 'Documents' section currently shows 'No records to display'.



The screenshot shows the 'Add Document' window. The 'Document Name' and 'Description' fields are highlighted, and the 'Add Document' button is circled in blue with the number 2. The 'Document' field has an 'Upload a document' button. The window also includes 'Edit', 'Delete', and 'View Document' buttons. The 'Add Document' button is circled in blue with the number 3.

# 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**.

The screenshot illustrates the 'Add Loan Documents' process. It features three main windows: 'Loan Information', 'Add Document', and 'Check In New Document'. The 'Add Document' window is the primary focus, showing fields for 'Document Name', 'Description', and a 'Document' field with an 'Upload a document' button. A red arrow points to this button, labeled with a circled '1'. The 'Check In New Document' window is overlaid on top, showing a 'Document File' field with a 'Choose File' button (labeled with a circled '3') and a 'Description' field. The 'Check In New Document' window also has a 'Set Lock Status' section with 'Locked' and 'Unlocked' radio buttons, and an 'OK' button (labeled with a circled '4'). The 'Loan Information' window in the background shows 'Assigned To Division Name' and 'Department Name' both set to 'M\_HDF Comprehensive Cancer Ctr'.



# 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

The screenshot displays the ARCHIBUS Space Update Form. The top navigation bar includes the ARCHIBUS logo, 'Stratist Home Page', and a search bar. The main content area is divided into tabs: 'My Room List', 'Active Space Update Room List', 'Room Details', and 'All Rooms'. The 'Room Details' tab is active, showing a table of room information with columns for Edit, Status, Floor Plan, Updated By, Building Code, Building Name, Floor Code, Room Code, Division Name, Department Name, Room Category, Room Type, Room Area Sq. Ft., Number of Workstations, Availability, Date Updated, and Date Started. Below this is the 'Department/PI Splits' section, which includes a table with columns for Delete, Edit, Status, Updated By, Division Name, Department Name, PI Name, Loaned From Division Name, Is Banked, Is Hotel, and Percentage of Space. The 'Occupancy' section is at the bottom, featuring a table with columns for Name - Full, Email Address, and Primary Employee Location. The 'Add New Occupancy Record' window is open, showing the 'Select Value - Employee' dialog box. The dialog box has a search bar and a table of employee records with columns for Employee ID, Name - First, Name - Last, Name - Full, and Department Name. The 'Save' button is highlighted in the 'Add New Occupancy Record' window.

Department/PI Splits	Delete	Edit	Status	Updated By	Division Name	Department Name	PI Name	Loaned From Division Name	Is Banked	Is Hotel	Percentage of Space	Loan Info
X		In Progress		M_Anatomy	M_Anatomy			No	No		33.30	
X		In Progress		M_Anatomy	M_Anatomy	Donald McDonald		No	No		33.40	
X		In Progress		M_Anatomy	M_Anatomy	Jason Rock		No	No		33.30	

Occupancy	Name - Full	Email Address	Primary Employee Location
	Nancy Mcnamara	nancy.mcnamara@ucsf.edu	Yes
	Maximilian Joseph Eugene Nitschke	Maximilian.Nitschke@ucsf.edu	Yes
	Breanna Allen	Breanna.Allen@ucsf.edu	Yes

Add New Occupancy Record	Employee Name*	Primary Employee Location
		No

Select Value - Employee	Employee ID	Name - First	Name - Last	Name - Full	Department Name
	020002440	Meyori	Hazenbos-Shibata	Meyori Hazenbos-Shibata	
	020003034	Juanita	Buitrago	Juanita Buitrago	Adult Inpatient Nursing
	020003109	Roger	Abaan	Roger Abaan	OPERATING ROOM ML
	020003125	Roman	Abad	Roman Abad	FOOD SERVICES PROCURI

# Room Details tab- Additional Occupancy information

- An employee's primary position will be 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

# 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.

**Space Update Form**

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

Compare Save Withdraw Submit Cancel

**Room Information**

Edit	Status	Floor Plan	Updated By	Building Code	Building Name	Floor Code	Room Code	Division Name	Department Name	Room Category	Room Type	Room Area Sq. Ft.	Number of Workstations	Availability	Date Updated	Date Status
<input type="checkbox"/>	In Progress			2252	Medical Science Building	13	1364	M_Anatomy	M_Anatomy	C-RESEARCH	WET LAB	3,040.85	54	45		3/1

**Department/PI Splits**

Delete	Edit	Status	Updated By	Division Name	Department Name	PI Name	Loaned From Division Name	Is Banked	Is Hotel	Percentage of Space	Loan Info
<input checked="" type="checkbox"/>		In Progress		M_Anatomy	M_Anatomy			No	No	33.30	
<input checked="" type="checkbox"/>		In Progress		M_Anatomy	M_Anatomy	Donald McDonald		No	No	33.40	
<input checked="" type="checkbox"/>		In Progress		M_Anatomy	M_Anatomy	Jason Rock		No	No	33.30	

**Occupancy**

<input type="checkbox"/>	Name - Full	Email Address	Primary Employee Location
<input checked="" type="checkbox"/>	Nancy Mcnamara	nancy.mcnamara@ucsf.edu	Yes
<input type="checkbox"/>	Maximilian Joseph Eugene Nitschke	Maximilian.Nitschke@ucsf.edu	Yes
<input type="checkbox"/>	Breanna Allen	Breanna.Allen@ucsf.edu	Yes
<input type="checkbox"/>	Gorica Amidzic	Gorica.Amidzic@ucsf.edu	Yes
<input type="checkbox"/>	Minah Kim	Minah.Kim@ucsf.edu	Yes
<input type="checkbox"/>	Alexander Bell	amb02010@mymail.pomona.edu	Yes

Add New Remove

**Confirm**

Are you sure you want to delete this record?

Yes No

# 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.

The screenshot displays the Archibus Space Update Form interface. The top navigation bar includes tabs for 'My Room List', 'Active Space Update Room List', 'Room Details' (selected), and 'All Rooms'. A red arrow points to a gear icon in the top right corner, labeled with a circled '1'. Below the navigation bar, the 'Room Information' section shows a table with columns for 'Edit', 'Status', 'Floor Plan', 'Updated By', 'Building Code', 'Building Name', 'Floor Code', 'Room Code', 'Division Name', 'Department Name', 'Room Category', and 'Room Type'. A row is visible with values: 'In Progress', '2281', 'Mission Hall Building', '06', '6541', 'M\_MEDICINE', 'M\_MED-CENTRAL ADMIN', 'C-ADMIN', and 'ADMIN OFFICE'. A dropdown menu is open from the gear icon, showing options: 'Select Fields', 'Submit Feedback', 'Training Resources', and 'SIS Temp Notes' (highlighted). Below the main form, a 'SIS Temporary Notes' window is open, labeled with a circled '2'. This window displays the following information:

Building Code	Floor Code	Room Code
2281	06	6541

SIS Notes  
Primary Occupant: Karno, Victoria  
Contacts:  
PI Room Notes:

A 'Close' button is located at the bottom right of the window.

# 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 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 interface showing action buttons and room information.

**Room Information**

Edit	Status	Floor Plan	Updated By	Building Code	Building Name	Floor Code	Room Code	Division Name	Department Name	Room Category	Room Type	Room Area Sq. Ft.	Number of Workstations	Availability	Date Updated	Date Started
	In Progress			2252	Medical Science Building	13	1364	M_Anatomy	M_Anatomy	C-RESEARCH	WET LAB	3,040.85	54	46		3/10/2

**Department/PI Splits**

Delete	Edit	Status	Updated By	Division Name	Department Name	PI Name	Loaned From Division Name	Is Banked	Is Hotel	Percentage of Space	Loan Info
		In Progress		M_Anatomy	M_Anatomy			No	No	33.30	
		In Progress		M_Anatomy	M_Anatomy	Donald McDonald		No	No	33.40	
		In Progress		M_Anatomy	M_Anatomy	Jason Rock		No	No	33.30	

**Occupancy**

Name - Full	Email Address	Primary Employee Location
Nancy Mcnamara	nancy.mcnamara@ucsf.edu	Yes
Maximilian Joseph Eugene Nitschke	Maximilian.Nitschke@ucsf.edu	Yes

# 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.

The screenshot displays the 'Space Update Form' with the 'Room Details' tab selected. A circled '1' points to the 'Compare' button in the 'Room Information' section. Below this, the 'Compare Proposed Changes' window is open, showing a comparison between 'Current' and 'Proposed' room information and PI splits. Circled numbers 2, 3, and 4 highlight the 'Room Info - Current', 'Room Info - Proposed', and the 'Close' button respectively.

**Space Update Form**

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

**Room Information**

Compare Save Withdraw Submit Cancel

Edit	Status	Floor Plan	Updated By	Building Code	Building Name	Floor Code	Room Code	Division Name	Department Name
<input type="checkbox"/>	In Progress			2316	Helen Diller Family Cancer Research	03	356	M_HDF Comprehensive Cancer Ctr	M_HDF Compr

**Compare Proposed Changes**

**Room Info - Current**

Building Code	Building Name	Floor Code	Room Code	Room Category	Room Type	Notes
2281	Mission Hall Building	06	6657	C-RESEARCH	DRY LAB	

**Room Info - Proposed**

Building Code	Building Name	Floor Code	Room Code	Room Category	Room Type	Notes
2281	Mission Hall Building	06	6657	C-RESEARCH	WET LAB	

**PIs/Splits - Current**

Division Name	Department Name	Percentage of Space	PI	Date Occupancy	Loaned From Division Name	Date Loaned Start	Date Loaned End	Is Banked	Is Hote
M_HDF Comprehensive Cancer Ctr	M_HDF Comprehensive Cancer Ctr	100.00		7/23/2015				No	No
		0.00						No	No

**PIs/Splits - Proposed**

Division Name	Department Name	Percentage of Space	PI	Date Occupancy	Loaned From Division Name	Date Loaned End	Date Loaned Start	Is Banked	Is Hote
M_HDF Comprehensive Cancer Ctr	M_HDF Comprehensive Cancer Ctr	100.00						No	No
		0.00						No	No

Close

# My Room List tab- Replace PI

Space Update Form

# 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.

The screenshot shows the 'Spar Update Form' interface. The 'My Room List' tab is selected. The 'Room Information' section displays a table of room data. The 'Replace PI' button is highlighted with a red circle and the number 2. The 'Replace PI' view window is open, showing the 'Select PI to Replace' section with instructions and a 'Current PI' input field. The 'Replace PI' button is highlighted with a red circle and the number 3. The 'Replace PI' view window is open, showing the 'Select PI to Replace' section with instructions and a 'Current PI' input field. The 'Replace PI' button is highlighted with a red circle and the number 4.

Status	Floor Plan	Building Code	Building Name	Floor Code	Room Code	BU Name	Division Name
<input type="checkbox"/> In Progress		2011	50 Kirkham St	01	101	SHARED	SHARED
<input type="checkbox"/> In Progress		2012	Kalmanovitz Library	01	144	SHARED	SHARED
<input type="checkbox"/> In Progress		2252	Medical Science Building	13	1328	M_School of Medicine	M_Anator
<input checked="" type="checkbox"/> Not Started		2252	Medical Science Building	13	1331	M_School of Medicine	M_Anator
<input type="checkbox"/> Approved by Space Strategist		2252	Medical Science Building	13	1332	M_School of Medicine	M_Anator
<input type="checkbox"/> Approved by Space Strategist		2252	Medical Science Building	13	1333	M_School of Medicine	M_Anator
<input checked="" type="checkbox"/> Not Started							
<input checked="" type="checkbox"/> Not Started							
<input type="checkbox"/> In Progress							

**Space Update Form**

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

**Replace PI** Download XLS Update Rooms

Building Code: 2[6017] 3[3285] All[9302] Page 1 of 94 Next >>

**Replace PI**

**Select PI to Replace**

1. Select the PI you wish to replace.  
2. A list of rooms where they are currently assigned will appear. Select those where the PI should be replaced. Note that any rooms currently In Progress or Pending Approval for an update will not be selectable.  
3. Select the new PI for the selected Spaces.

Current PI

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



# 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.

**Space Update Form**

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

**Replace PI**

**Select PI to Replace**

1. Select the PI you wish to replace.  
 2. A list of rooms where they are currently assigned will appear. Select those where the PI should be replaced. Note that any rooms currently In Progress or Pending Approval for an update will not be selectable.  
 3. Select the new PI for the selected Spaces.

Current PI  (1)

**Space Update Form**

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

**Replace PI**

**Select PI to Replace**

1. Select the PI you wish to replace.  
 2. A list of rooms where they are currently assigned will appear. Select those where the PI should be replaced. Note that any rooms currently In Progress or Pending Approval for an update will not be selectable.  
 3. Select the new PI for the selected Spaces.

**Select Value - Current PI** (2)

Employee ID	Name - First	Name - Last	Name - Full	Department Name
99999999	PI Assignment	Pending	PI Assignment Pending	
028848133	Zena	Werb	Zena Werb	M_Anatomy
020595716	Jason	Rock	Jason Rock	M_Anatomy
025484445	Donald	McDonald	Donald McDonald	M_Anatomy
025936063	Keith	Mostov	Keith Mostov	M_Anatomy
023181548	Evan	Feinberg	Evan Feinberg	M_Anatomy
021003512	Nirao	Shah	Nirao Shah	M_Anatomy
020462131	Allan	Basbaum	Allan Basbaum	M_Anatomy
029224318	Carolyn	Larabell	Carolyn Larabell	M_Anatomy
028661064	Rushika	Perera	Rushika Perera	M_Anatomy
029727690	Jeroen	Roose	Jeroen Roose	M_Anatomy
024390627	Saul	Villeda	Saul Villeda	M_Anatomy
027139955	Steven	Rosen	Steven Rosen	M_Anatomy
023550908	Nancy	Mcnamara	Nancy Hcnamara	M_Anatomy
024545378	Todd	Nystul	Todd Nystul	M_Anatomy
025301540	Andrew	Brack	Andrew Brack	M_Orthopaedic Surgery
026053264	Derek	Harmon	Derek Harmon	M_Anatomy
026255018	Peter	Ohara	Peter Ohara	M_Anatomy
022100788	Annemarie	Donjacour	Annemarie Donjacour	M_Anatomy
028406023	Kimberly	Topp	Kimberly Topp	M_Physical Therapy

Not all records are shown.

Close (4)

# My Rooms List- Replace PI, cont.

- The PI you selected to replace is shown in the Current PI field.
- The rooms currently assigned to that PI will display in a list in the **Rooms to Reassign** section.
- 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.
- If you do not wish to make changes at this time click on the **Close** button.

**Space Update Form**

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

**Replace PI**

**Select PI to Replace**

1. Select the PI you wish to replace.  
2. A list of rooms where they are currently assigned will appear. Select those where the PI should be replaced. Note that any rooms currently In Progress or Pending Approval for an update will not be selectable.  
3. Select the new PI for the selected Spaces.

Current PI: Zena Werb

**Rooms to Reassign**

Status	Floor Plan	Building Code	Building Name	Floor Code	Room Code	Division Name	Department Name	PI Code	Room Type
<input type="checkbox"/> Not Started		3009	HSIR West	13	1301	M_Anatomy	M_Anatomy	028848133	WET LAB
<input type="checkbox"/> Not Started		3009	HSIR West	13	1302	M_Anatomy	M_Anatomy	028848133	WET LAB SUP
<input type="checkbox"/> Not Started		3009	HSIR West	13	1303	M_Anatomy	M_Anatomy	028848133	WET LAB SUP
<input type="checkbox"/> Not Started		3009	HSIR West	13	1304	M_Anatomy	M_Anatomy	028848133	WET LAB SUP

**Select New PI**

PI Name:  Date Occupancy:

Save Cancel

Close

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

# 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 today's date or a past date. Future dates are not allowed.

**Space Update Form**

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

**Replace PI**

**Select PI to Replace**

1. Select the PI you wish to replace.  
2. A list of rooms where they are currently assigned will appear. Select those where the PI should be replaced. Note that any rooms currently In Progress or Pending Approval for an update will not be selectable.  
3. Select the new PI for the selected Spaces.

Current PI: Zena Werb

**Rooms to Reassign**

Status	Floor Plan	Building Code	Building Name	Floor Code	Room Code	Division Name	Department Name	PI Code	Room Type
<input checked="" type="checkbox"/> Not Started	[icon]	3009	HSIR West	13	1301	M_Anatomy	M_Anatomy	028848133	WET LAB
<input checked="" type="checkbox"/> Not Started	[icon]	3009	HSIR West	13	1302	M_Anatomy	M_Anatomy	028848133	WET LAB SUP
<input checked="" type="checkbox"/> Not Started	[icon]	3009	HSIR West	13	1303	M_Anatomy	M_Anatomy	028848133	WET LAB SUP

**Select New PI**

PI Name: Michael Abel

Date Occupancy: [calendar icon]

Save Cancel

**Calendar Window**

March 2016

Sun	Mon	Tue	Wed	Thur	Fri	Sat
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

Today Close

Date Occupancy: [input field]

Save Cancel

# 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.

**Space Update Form**

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

**Replace PI**

**Select PI to Replace**

1. Select the PI you wish to replace.  
2. A list of rooms where they are currently assigned will appear. Select those where the PI should be replaced. Note that any rooms currently In Progress or Pending Approval for an update will not be selectable.  
3. Select the new PI for the selected Spaces.

Current PI: Zena Werb

**Rooms to Reassign**

<input checked="" type="checkbox"/>	Status	Floor Plan	Building Code	Building Name	Floor Code	Room Code	Division Name	Department Name	PI Code	Room Type
<input checked="" type="checkbox"/>	Not Started		3009	HSIR West	13	1301	M_Anatomy	M_Anatomy	028848133	WET LAB
<input checked="" type="checkbox"/>	Not Started		3009	HSIR West	13	1302	M_Anatomy	M_Anatomy	028848133	WET LAB SUP
<input checked="" type="checkbox"/>	Not Started		3009	HSIR West	13	1303	M_Anatomy	M_Anatomy	028848133	WET LAB SUP

**Select New PI**

PI Name: Michael Abel | Date Occupancy:

Save Cancel

**Message**

The selected rooms have been successfully edited

OK

Close

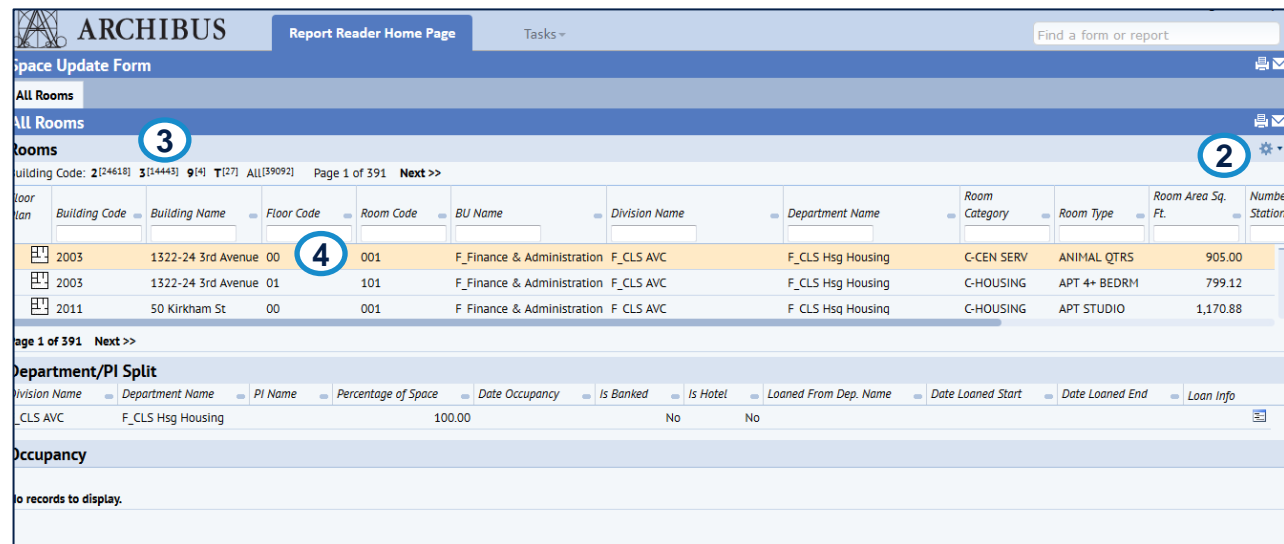
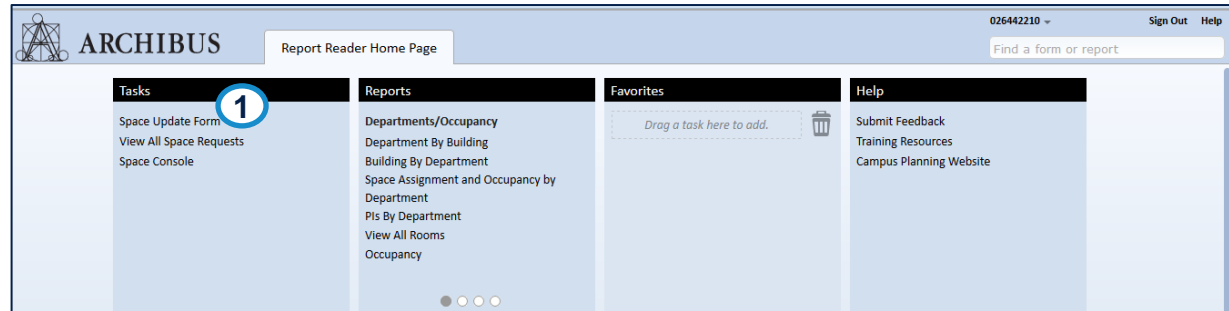
# All Rooms Tab

Space Update Form

# 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.



# 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.

**All Rooms**

**Rooms**

Building Code: 2[24618] 3[14443] 9[4] All[39065] Page 1 of 391 Next >>

Floor Plan	Building Code	Building Name	Floor Code	Room Code	BU Name	Division Name	Department
	2003	1322-24 3rd Avenue	00	001	F_Finance & Administration	F_CLS AVC	F_CLS Hsg
	2003	1322-24 3rd Avenue	01	101	F_Finance & Administration	F_CLS AVC	F_CLS Hsg
	2011	50 Kirkham St	00	001	F_Finance & Administration	F_CLS AVC	F_CLS Hsg
	2011	50 Kirkham St	01	101	F_Finance & Administration	F_CLS AVC	F_CLS Hsg
	2012	Kalmanovitz Library	01	100	E_Executive Vice Chancellor	E_Library	E_Library
	2012	Kalmanovitz Library	01	101	E_Executive Vice Chancellor	E_Library	E_Library
	2012	Kalmanovitz Library	01	103	E_Executive Vice Chancellor	E_Library	E_Library

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**Department/PI Split**

Division Name	Department Name	PI Name	Percentage of Space	Date Occupancy	Is Banked	Is Hotel	Loaned From Dep. Name	Date Loaned Start	Date Loaned End	Loan In
F_CLS AVC	F_CLS Hsg Housing		100.00	2/8/2012	No	No				

**Occupancy**

No records to display.

# You have completed the module