



Estates and Buildings Information System

User Guide

Web Central v23

Helpdesk

*Reviewing And Approving A Work
Request*

Foreword

This User Guide document has been designed for the purpose of training relevant members of staff within the Estates Department.

System Support

If you require assistance please contact ebisusers@ed.ac.uk in the first instance. All urgent requests should be directed to the EBIS Users Support Desk on 0131 650 9683.

More information on the EBIS Project is available at:

www.ed.ac.uk/estates/what-we-do/ebis

Logging on to Web Central

Login to the following URL using your EASE user name and password:

www.webcentral.estates.ed.ac.uk/archibus/login.axvw

This will open Web Central Application showing access you have been set up with.

Estates Helpdesk

The Estates Helpdesk is open 8am – 6pm during each business day, with Security dealing with emergencies out with these times. Contact details are as follows, telephone 0131 650 2494 or by email estates.helpdesk@ed.ac.uk

Accessibility

If you require this document in an alternative format, please contact estates.helpdesk@ed.ac.uk or telephone 0131 650 2494.

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Document Version Control

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27/11/2020	Eileen Mullan	V1.4	General Review
09/12/2022	Eileen Mullan	V1.5	Review in line with P&M introduction Various screenshots updated

1. Reviewing And Approving A Work Request (WR)

1.1. Purpose

This user guide is for the Helpdesk and shows the different steps needed to complete the following activities:

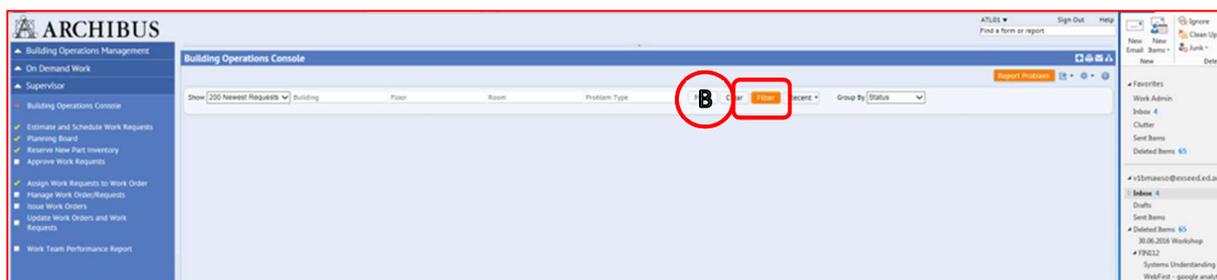
- Access the Building Operations Console to view requested Work Requests assigned to your team
- Approving the Work Request
- Assigning the Work Request to a team work queue

1.2. Accessing the Building Operations Console

After logging onto the WebCentral system you will see the following screen, select the **(A) Building Operations Console** option.



When you see the following screen, check the filters applied and then select the **(B) Filter** option.

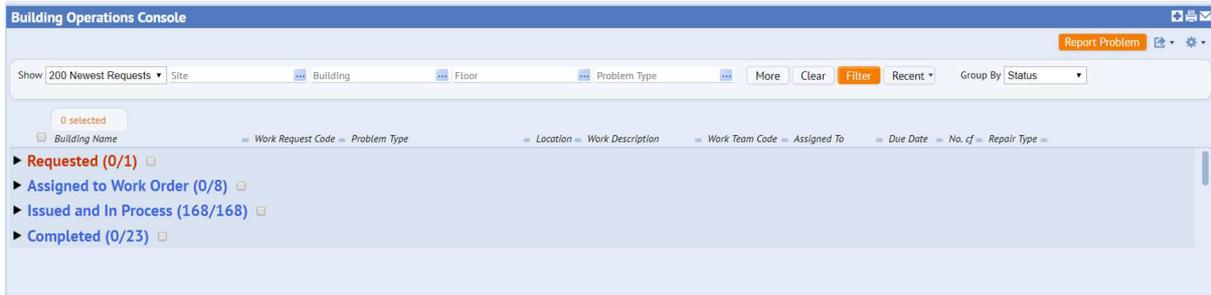


(See **Appx A** to review the filters and column setup for the Building Operations Console page)

This screen is broken down into sections based on the Work Request life cycle.

(See **Appx B** to understand the lifecycle of a Work Request)

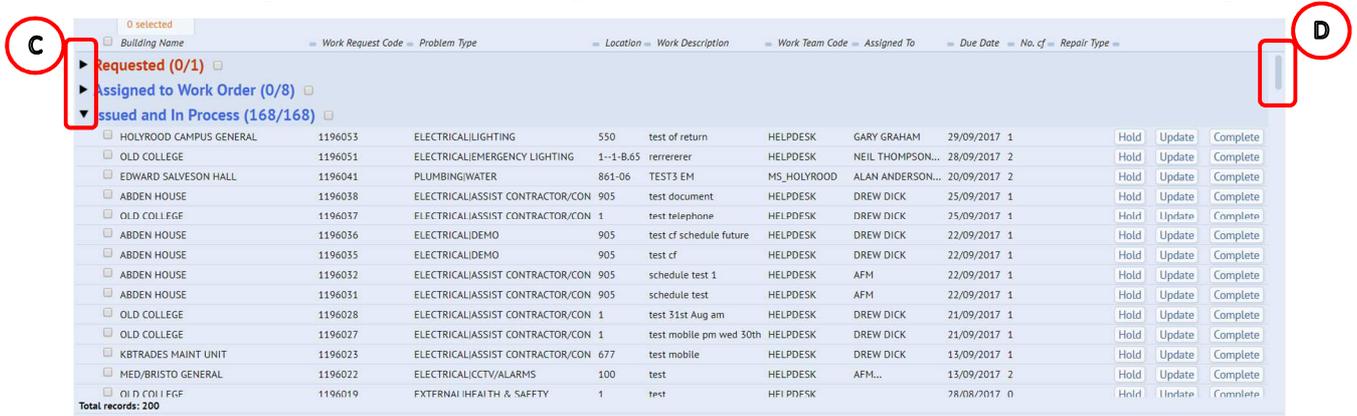
The page will load with the status bands collapsed, but indicating how many requests are in each band (number loaded/number in section).



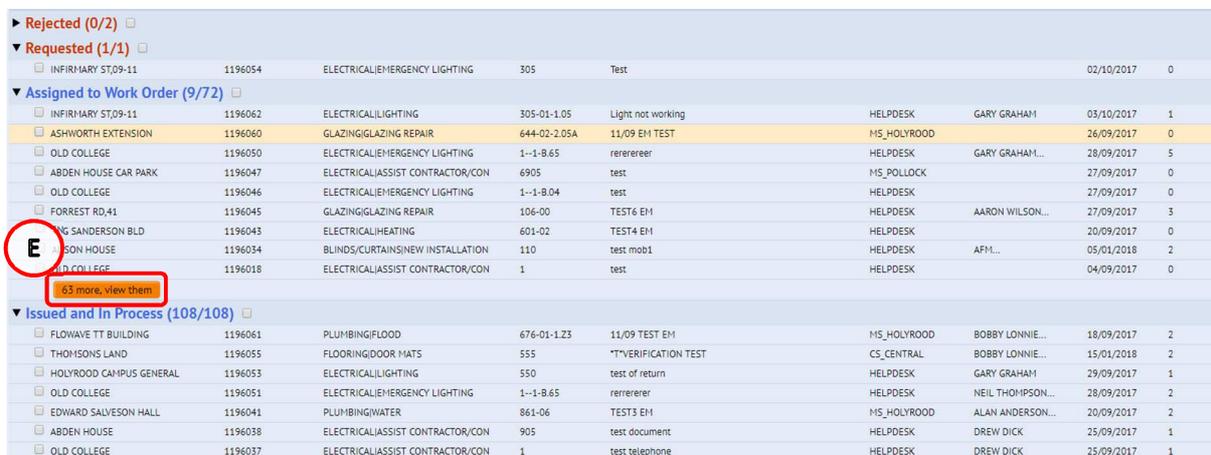
The following the options will help to view the page:

The **(C) Expand/ collapse** triangle to the left of the titles to hide or show information by work status.

The **(D) Navigation slider** to the right of the screen to scroll up and down the page



Refresh your screen regularly to view new work requests, further work requests in your queue not currently showing on your screen, will be notified by the **(E) More, View Them** button, select this to load these work requests



If more than 50 records select **Show Next** at bottom of screen

1.3. Displaying “Requested Work Requests”

To progress a Requested Work Request, you will need to review the details to ensure they are correct.

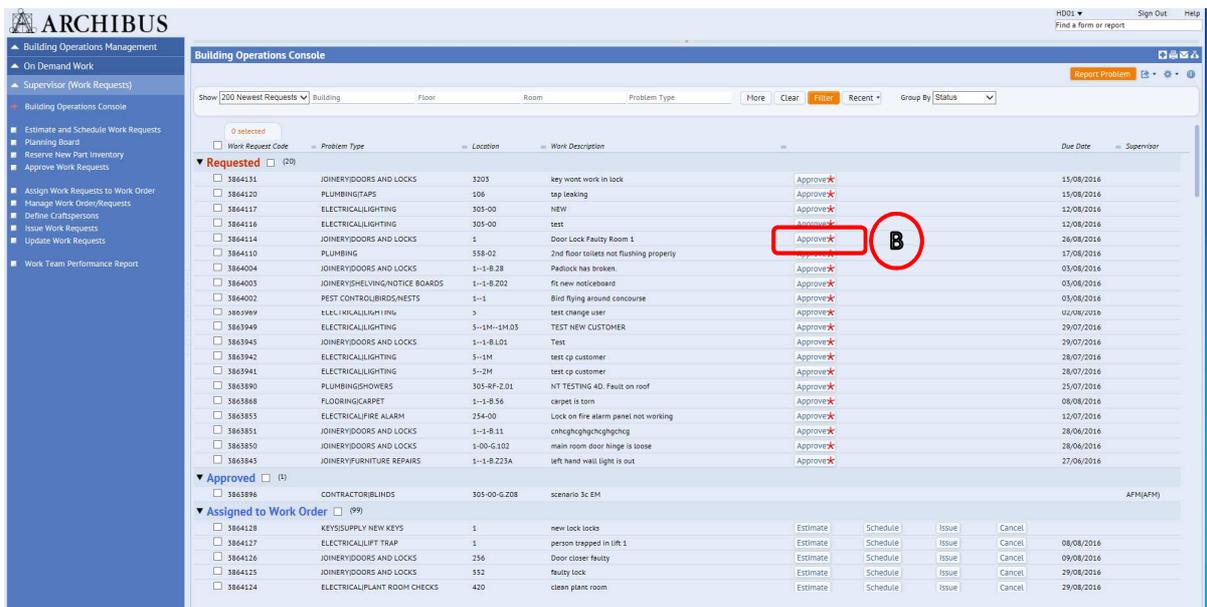
Set filter to **(A) Pending Steps** and press the FILTER button.

Navigate to the **Requested** section of the **Building Operations Console** page.

Work Requests should be approved as soon as possible after being received, and by their due date to ensure they are received by the work teams with the maximum amount of workable time possible.

You can re-order a column by clicking on it’s header, so it is either sorted in ascending or descending order. (Note filters can be used to focus on priority work)

To view the details of an individual record, select the **(B) Approve** option.



1.4. Amending Details Of A Requested Work Request Before Approving It

After selecting the **Approve** option, the system will display the **Approve Work Request** pop up screen.

After reviewing, you can amend some of the details if you feel it necessary, for example the location, problem type or priority.

You can alter information in 2 different ways:

i) Typing directly into a field will start to provide a drop down list to select from.

For example, changing the problem type and starting to type Joinery will provide a list of all problems that start with the letters “JOI”, making it quicker to see and select the option you require.

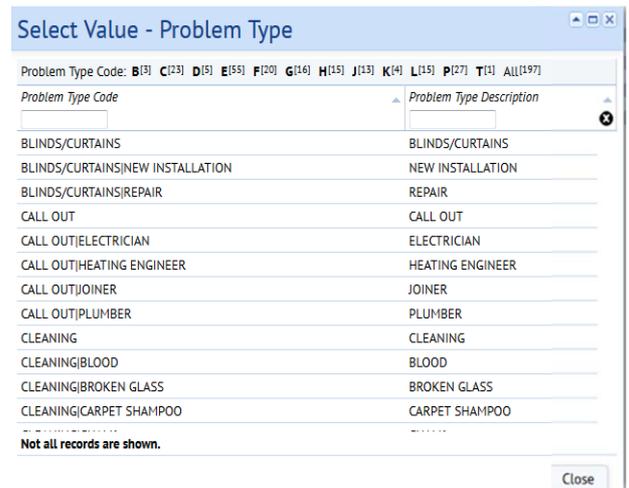
Or

ii) Hovering your mouse over either field (even if it already contains an entry) will provide an additional **(A)** option.

Selecting that option will provide a further **Select Value** pop up screen, with details of all available entries for that field.

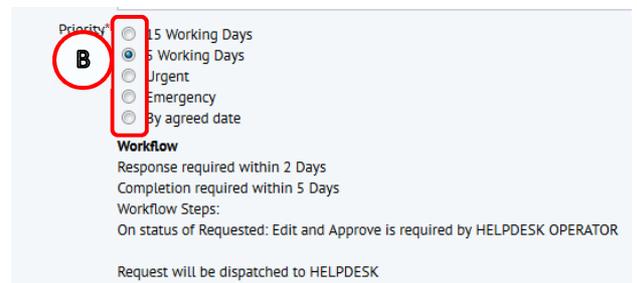
When you have identified the entry required, clicking on it will select the chosen option, close the **Select Value** screen and populate the details on the **Approve Work Request** screen.

(NOTE: Selecting **Close** will return you to the **Approve Work Request** screen without copying across any details).



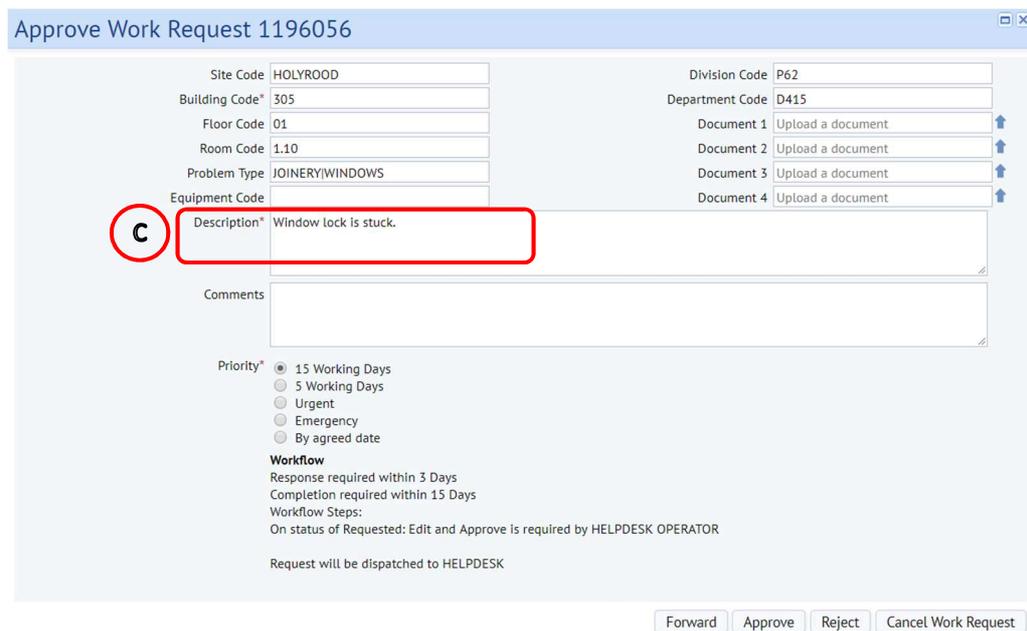
You can amend the priority by selecting one of the different **(B) Radio Buttons** options.

Any amendments to this section will also update the Workflow details.



NOTE: If you make any changes to problem Type or Location, please remember to double check the priority as this defaults to 15 days following any changes to these sections

You can also amend the **(C) Description** text to highlight if the job is Urgent, or an Emergency, or if the work is Rechargeable by adding the relevant prefix (see appendix 2.4 Useful Prefixes for list of common prefix to the start of the description text).



If you do make any changes, remember to add any **(D) Comments** to help explain your changes.

(Note: these comments will only appear in WR history and not be viewable to mobile users at a later point, so should not contain details about the work required, only what changes you have made to the original request, e.g. changing the priority)

(Note: Any significant changes ie priority URG/5 day should be discussed with requestor prior to being changed)

Once changes have been made select **E Approve** this will save changes, close the Approve Works Request screen and return to Building Operations Console

(Note: If problem type/location/priority have been changed the WR remains at Requested and requires secondary approval)

1.5. Rejecting A Requested Work Request

THIS IS NOT A PREFERRED METHOD, WRs SHOULD BE HELD AT APPROVAL WHILE AWAITING UPDATE

If you have reviewed the work request and feel it is not appropriate (for example a duplicate request, the information is incomplete or the job has not been finished) and you are unable to contact the requestor to clarify required details then you can reject by selecting the **(A) Reject** option

(NOTE: If you have selected the **Reject** option, without having added any comments, the system will prompt you to enter these.

Select the **(B) OK** option, which will return you to the **Approve Work Request** pop up screen to add some comments).

When rejected, the work request status will be updated to **Rejected** and appear under this status heading in the customers console for review.

The Approve Work Order pop up screen will be closed and you will be returned to the **Building Operations Console** screen.

(Note: It should be highlighted to customer that WR has been rejected either via telephone or email)

If the Work request is one you have created (or you need to talk a user through finding and actioning a rejected work request) these will be displayed in your console under the status step **(D) Rejected**. To resubmit the request you must first apply filter to show **(C) Pending Steps**, this will give access to the actions Buttons **(E) & (F)**.



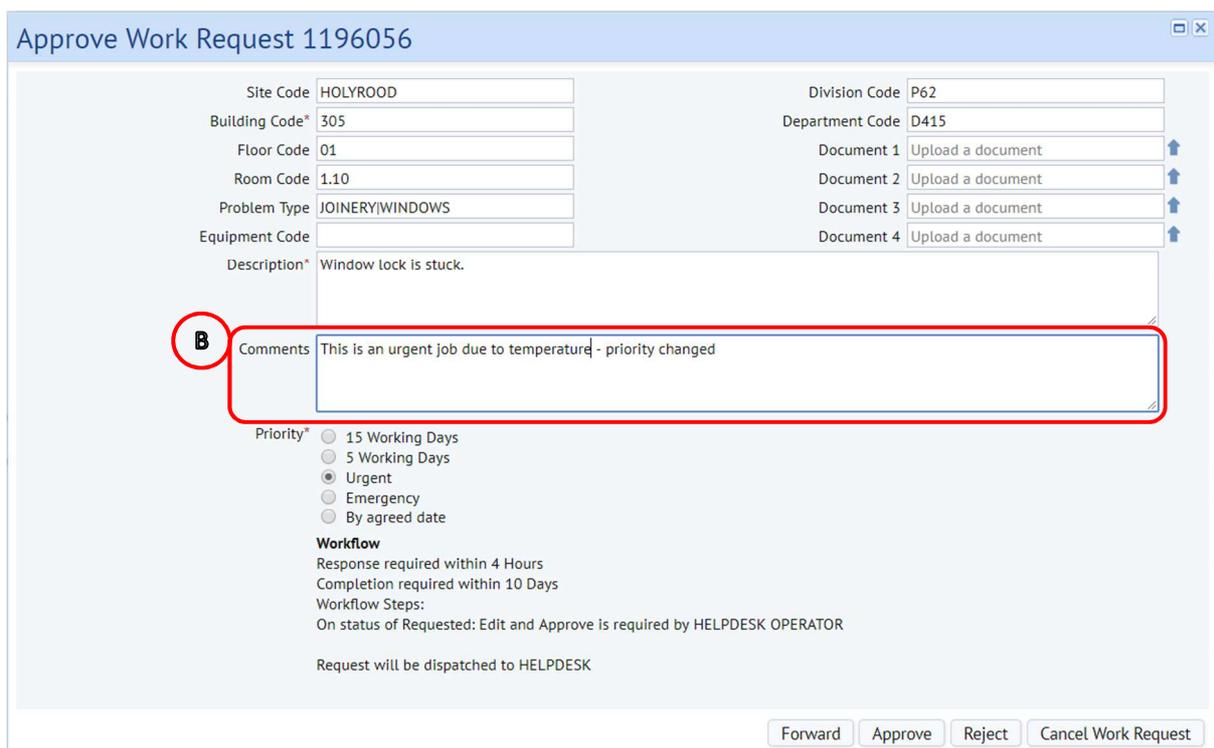
You can then either, cancel and archive the work request immediately using **(F) Cancel** button, or add further information/resubmit the work request back to the Estates Helpdesk team for further review. To do this select **(E) Update** button.

The **Update Work Request** pop up screen then appears.

1.6. Cancelling A Work Request

You can also cancel and archive a work request without providing an opportunity for a customer to review and resubmit the work request by selecting **(A) Cancel Work Request** option.

(NOTE: Comments should be added into **(B) Comments** section explaining why the work request is being canceled.



Once selected you will be returned to the Building Operations Console.

(NOTE: The (C) Forward button only permits a work request to be moved to another individual and not a work team at this stage, therefore this will not be used)

1.7. Approving A Requested Work Request

If you have reviewed the work request and feel it is appropriate, ensure appropriate prefix is added and select the **(A) Approve** option.

The work request status will be updated, and will have moved from the Requested status section to the Assigned To Work Order status section of the **Building Operations Console** screen under HELPDESK work team.

The Approve Work Order pop up screen will be closed and you will be returned to the **Building Operations Console** screen.

The system also allows approvals to be applied to a group of work orders where individual review is not required.

From the Building Operations Console screen, select the **(B) Tick Boxes** next to the work orders that require approval.

An **(C) Approval** option will appear at the top of the screen, that will allow you to approve the selected group.

The system will also display a comments field, should you wish to add further comments.



(NOTE: There is an **Approved** work order status, which is not used by UoE. When you return to the Building Operations Console screen and you cannot see the work request, try removing any filters so you can see the Approved status section. If this has happened, escalate to the Helpdesk Manager).

1.8. Forwarding The Work Request To A Work Team

An Approved Work Request will now need to be forwarded to the appropriate work team queue to carry out the request.

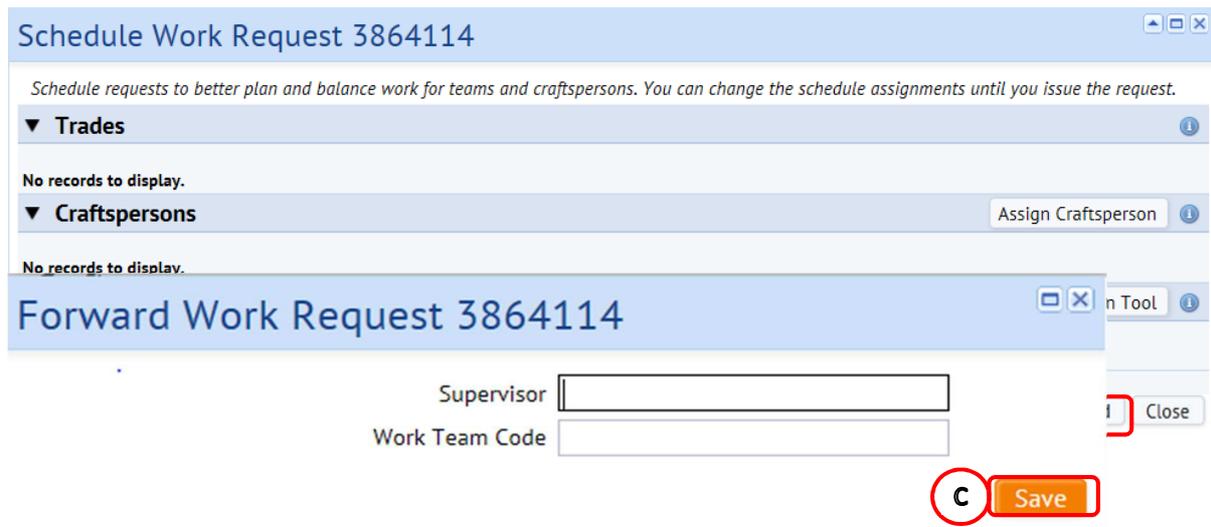
(Note: this can be done multiple times if required as long as the work request has not been assigned to Craftperson & no time has been incurred on it)

From the Building Operations Console page, select the **(A) Schedule** option.

Work Request Code	Location	Work Description	Actions
<input type="checkbox"/> 3864131	JOINERY/DOORS AND LOCKS 3203	key wont work in lock	Approve
<input type="checkbox"/> 3864004	JOINERY/DOORS AND LOCKS 1--1-B.28	Padlock has broken.	Approve
<input type="checkbox"/> 3863945	JOINERY/DOORS AND LOCKS 1--1-B.L01	Test	Approve
<input type="checkbox"/> 3863851	JOINERY/DOORS AND LOCKS 1--1-B.11	cnhcgchghcgchghcgchcg	Approve
<input type="checkbox"/> 3863850	JOINERY/DOORS AND LOCKS 1-00-G.102	main room door hinge is loose	Approve
<input type="checkbox"/> 3863231	JOINERY/DOORS AND LOCKS 1--1-B.22	Second test with EASE authentication on Test - ...	Approve
Assigned to Work Order (12)			
<input type="checkbox"/> 3864125	JOINERY/DOORS AND LOCKS 552	faulty lock	Estimate Schedule Issue Cancel
<input type="checkbox"/> 3864114	JOINERY/DOORS AND LOCKS 1	Door Lock Faulty Room 1	Estimate Schedule Issue Cancel
<input type="checkbox"/> 3864126	JOINERY/DOORS AND LOCKS 256	Door closer faulty	Estimate Schedule Issue Cancel
<input type="checkbox"/> 3863978	JOINERY/DOORS AND LOCKS 1--1-B.262	scenario test EM replace handle on door	Estimate Schedule Issue Cancel
<input type="checkbox"/> 3864006	JOINERY/DOORS AND LOCKS 1--1-B.Z26	lock not working properly	Estimate Schedule Issue Cancel
<input type="checkbox"/> 3863194	JOINERY/DOORS AND LOCKS 1--1-B.47	test at pollock	Estimate Schedule Issue Cancel
<input type="checkbox"/> 3865219	JOINERY/DOORS AND LOCKS 1--1-B.L01	Test on 28/04/16 Then on 14/7	Estimate Schedule Issue Cancel
<input type="checkbox"/> 3863196	JOINERY/DOORS AND LOCKS 1-01-1.286	test SLAs set up	Estimate Schedule Issue Cancel
<input type="checkbox"/> 3863181	JOINERY/DOORS AND LOCKS 1--1-B.57	Test 2	Estimate Schedule Issue Cancel
<input type="checkbox"/> 3863183	JOINERY/DOORS AND LOCKS 1-00	TEST MASS	Estimate Schedule Issue Cancel
<input type="checkbox"/> 3863184	JOINERY/DOORS AND LOCKS 305-00	TEST	Estimate Schedule Issue Cancel
<input type="checkbox"/> 3863186	JOINERY/DOORS AND LOCKS 305	test	Estimate Schedule Issue Cancel

The system will display the following pop up screen.

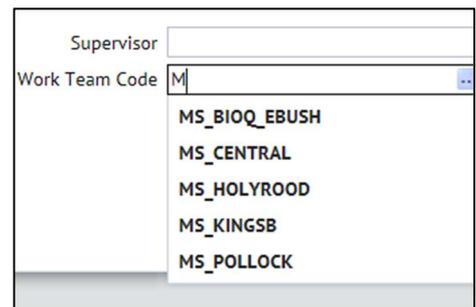
Select the **(B) Forward** option, to select an appropriate work team.



(NOTE: If you select the **(C) Save** option without populating a name or team, the system will prompt you to enter details)

You can select where to forward to in 2 different ways:

i) Typing directly in the **Work Team Code** fields, which will start to provide a drop down list to select from



Or

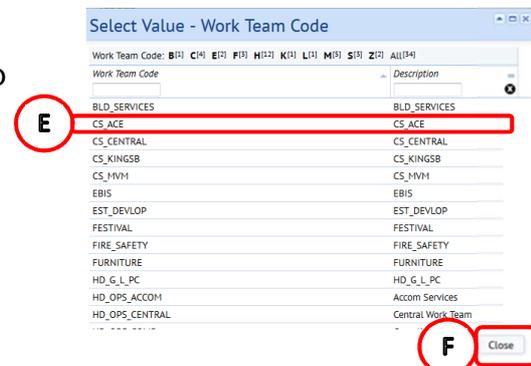
ii) Hovering your mouse over either field will provide an additional **(D) Option**.



(NOTE: UoE are only using the **Work Team Code** option, not the **Supervisor**)

Selecting that option will provide a further **Select Value** pop up screen, with details of all available entries for that field.

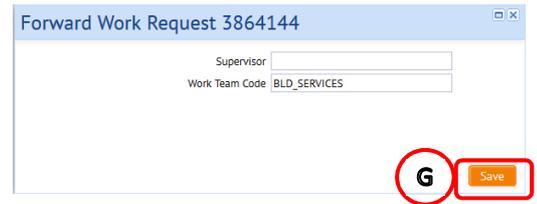
When you have identified the **(E) Entry** required, clicking on it will select the chosen option, close the **Select Value** screen and populate the details on the **Forward Work Request** screen.



(NOTE: Selecting **(F) Close** will return you to the **Forward Work Request** screen without copying across any details).

If you select a wrong Team, you can repeat these steps until you have the desired name.

When you have the team populated, select the **(G)** **Save** option, which will return you to the Building Operations Console screen

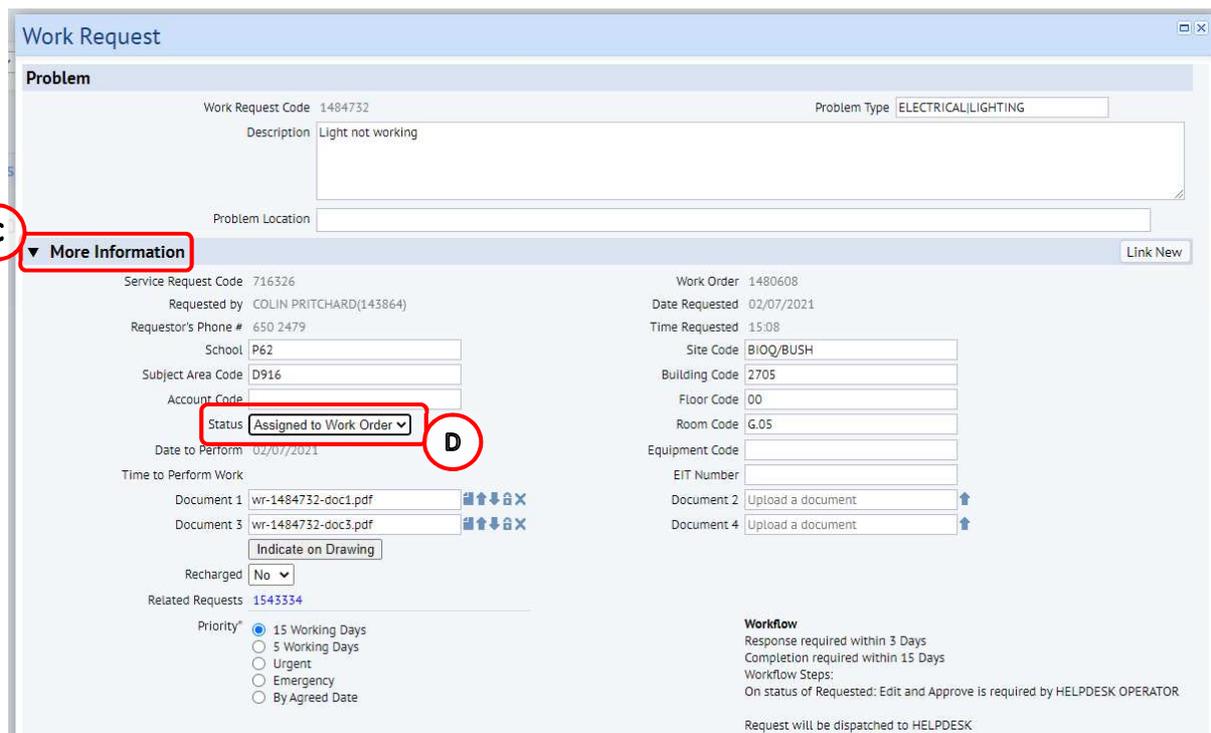


1.9 Returning A Work Request

If you need to update the perimeters of a work request after approval you can reset the status to an earlier point in the workflow. You should update work request parameters at the **Requested** status step only.

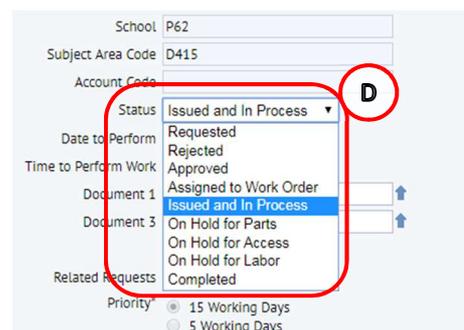
(Note: see appendix 2.2.1 valid moves & reasons to change work request status)

Access the **Work Request** pop up screen, and expand the **(C) More Information** section.



You can reset or change the status step of the work request to an earlier point in the workflow by selecting the drop down menu **(D) Status**

NOTE: *RET* To be added as prefix in problem description if being returned to requested to highlight this is a returned Work Request as it will need to go through the Approval process again



Once you have selected the new status step, the **Return Work Request** pop up screen displays.

You are required to leave **(E) Comments**, and then select **(F) Update Request** to complete the change in status step.

Selecting Cancel will return you to the **Work Request** pop up screen with no change to the work request saved.

Return Work Request 1196053

This action returns the request to prior status or a prior workflow step.

Status: Assigned to Work Order

Comments

E

F Update Request Cancel

2.0. Appx A: Using filter & amending columns - Building Operation Console Screen

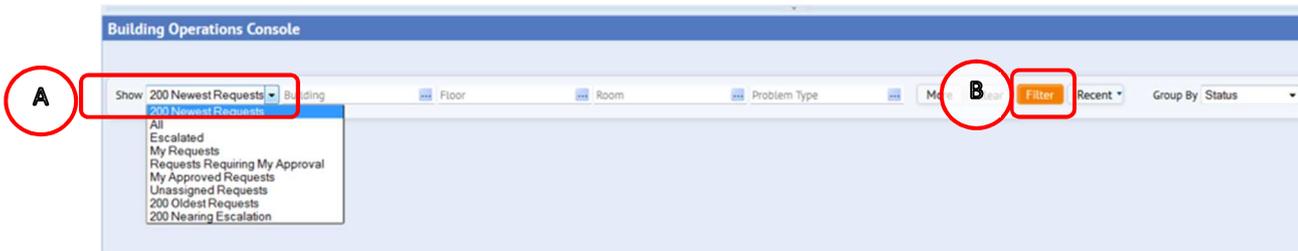
2.1 Using filters

From the main **Building Operation Console** screen it is always good practice to ensure you have applied filters before asking the system to display information about your Work Requests.

There are a range of filter options available to you, depending on your role. For example, as a Customer you may wish to search for all you Work Requests under a specific building.

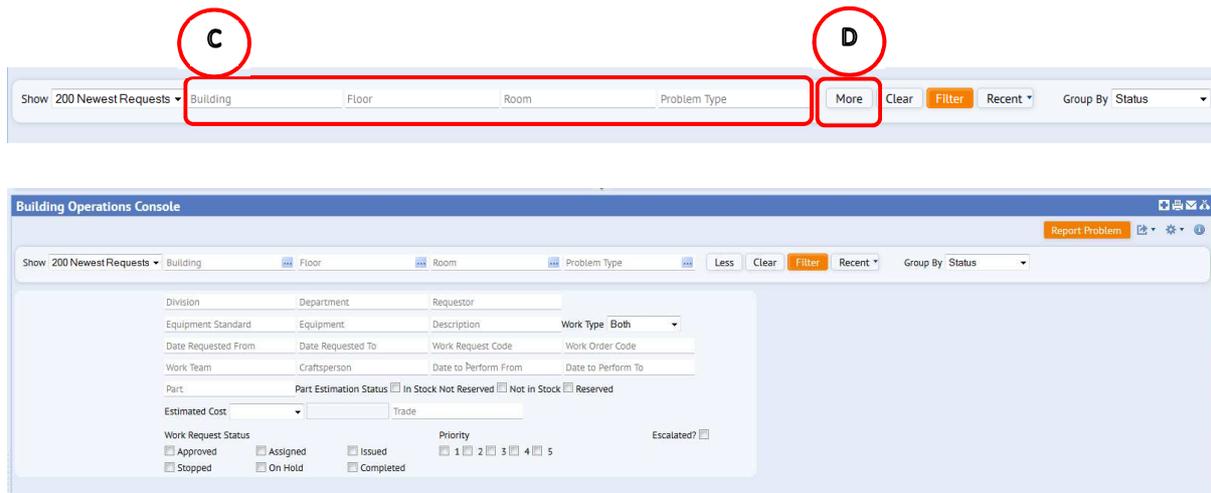
The **(A) Show** option will provide a drop down list of generic searches, such as by status or Work Request age.

Choose an option then select the **(B) Filter** option, and the page will show the Work Requests that fall within the selected criteria.



There are a range of filters by **(C) Location & Problem Type**

Selecting the **(D) More** option offers a search on a wider range of Work Request information, such as date or assigned craftsperson.

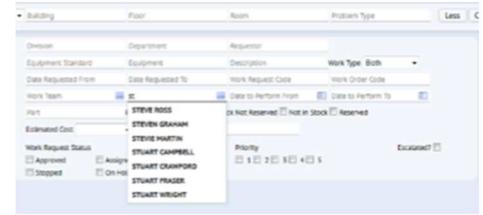


You can select information for the different fields in 2 different ways:

i) Typing directly in any fields, which will start to provide a drop down list to select from

Or

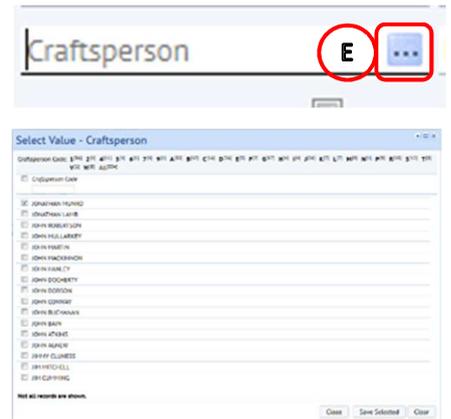
ii) Hovering your mouse over either field will provide an additional **(E) Option**.



Selecting that option will provide a further **Select Value** pop up screen, with details of all available entries for that field.

When you have identified the entry required, clicking on it will select the chosen option, close the **Select Value** screen and populate the details on the main screen.

You can search on more than 1 item, by selecting one or more of the tick boxes to the left of an option.



(NOTE: Selecting **Close** will return you to the previous screen without copying across any details. Selecting **Clear** will remove any options ticked for selection and default to the 200 Newest Work Requests).

Some **Select Value** pop up screens may also contain an additional search function.

Selecting one of the **(F) Number/ Letter** options at the top of the **Select Value** pop up screen will narrow the display to only show items that start with that number/ letter.



After selection of an individual Number/ Letter option to return to the original list, select the **(G) Up** option.

Select Value - Equipment Code

Equipment Code: **NC**^[6] **Up** ^[6] **G**

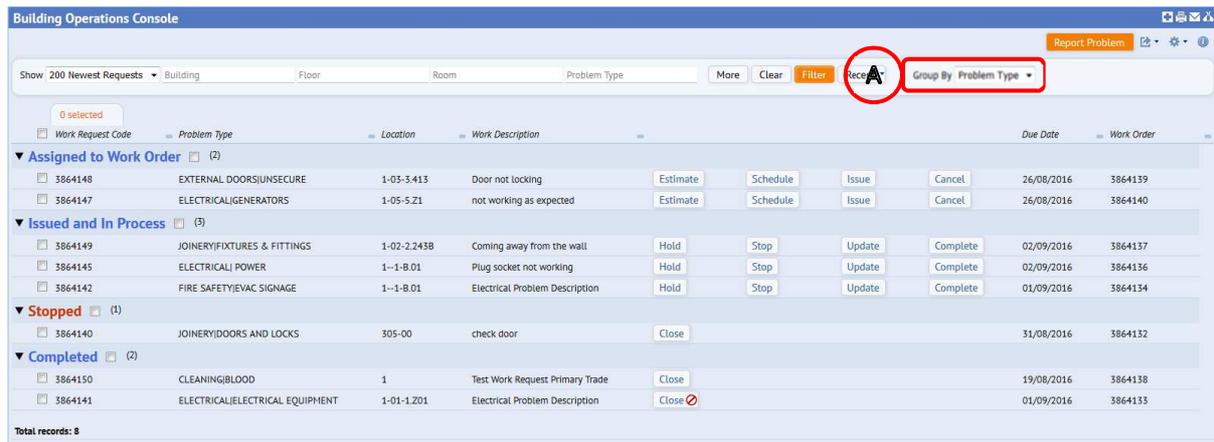
<input type="checkbox"/> Equipment Code	<input type="checkbox"/> Equipment Standard
<input type="checkbox"/> NCMONITOR1	MONITOR
<input type="checkbox"/> NCMONITOR2	MONITOR
<input type="checkbox"/> NCOHP1	OHP

2.1.1 Using the Group By Option

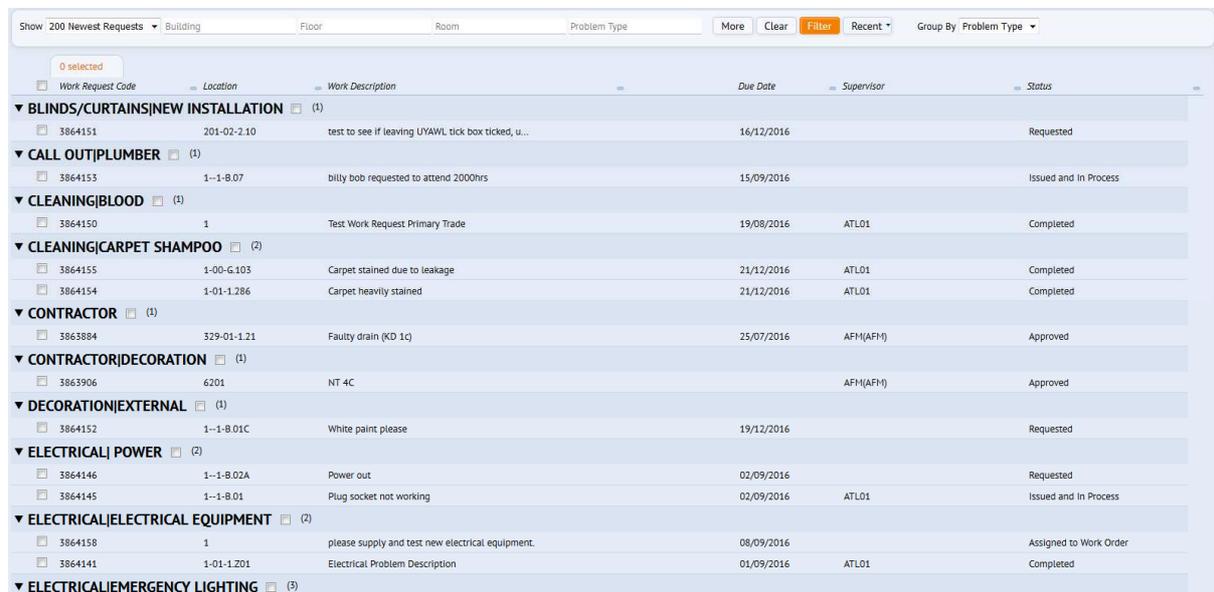
Having applied the necessary filters and the system has displayed the relevant work requests, you can also amend how the records are grouped.

As a Customer, you will be able to group the records by either the Work Request Status or by Problem Type.

Selecting the **(A) Grouped By** option will display an option list, for you to choose a relevant option.



The system will re-group the records by the selected option.

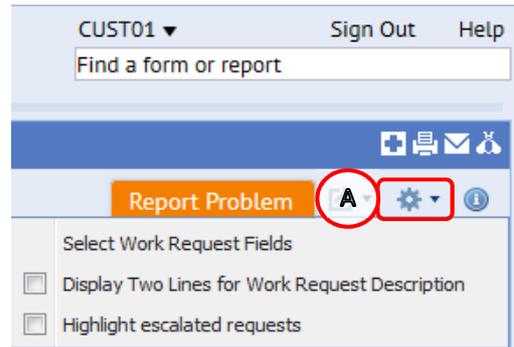


2.1.2 Amending Columns - Building Operations Console

Having applied the necessary filters and the system has displayed the relevant work requests, you can also amend the columns displayed depending on your role.

For example, as a customer and fault reporter, including details of who the work has been assigned to may help with understanding progress, and when making enquiries.

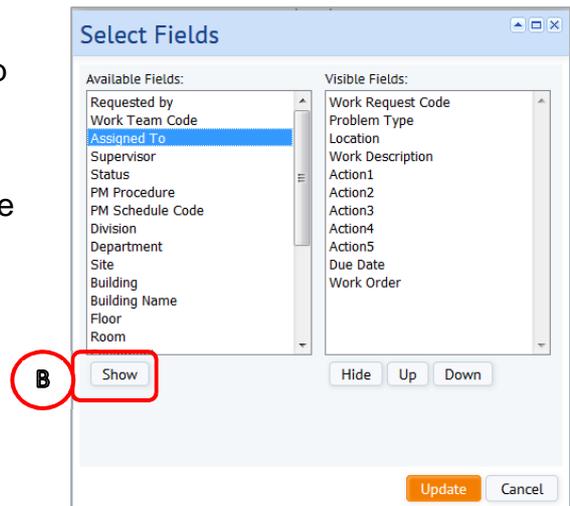
Selecting the **(A) Edit** icon will display an option list, choose the **Select Work Request Fields** option.



The system will display a **Select Fields** pop up screen.

The left hand column will show all available fields, while the right hand column will show the selected fields already displayed on your Building Operations Console.

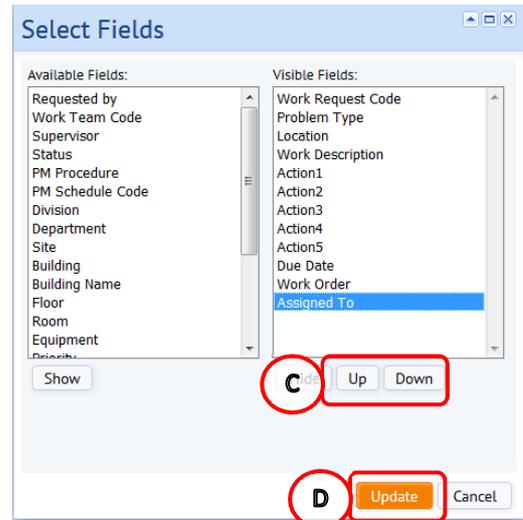
To add an item to your display, highlight it, then select the **(B) Show** option.



The selected item will move from the left hand column into the right hand column.

You can also change the order the new item appears on the Building Operations Console screen by moving it **(C) Up** or **Down**.

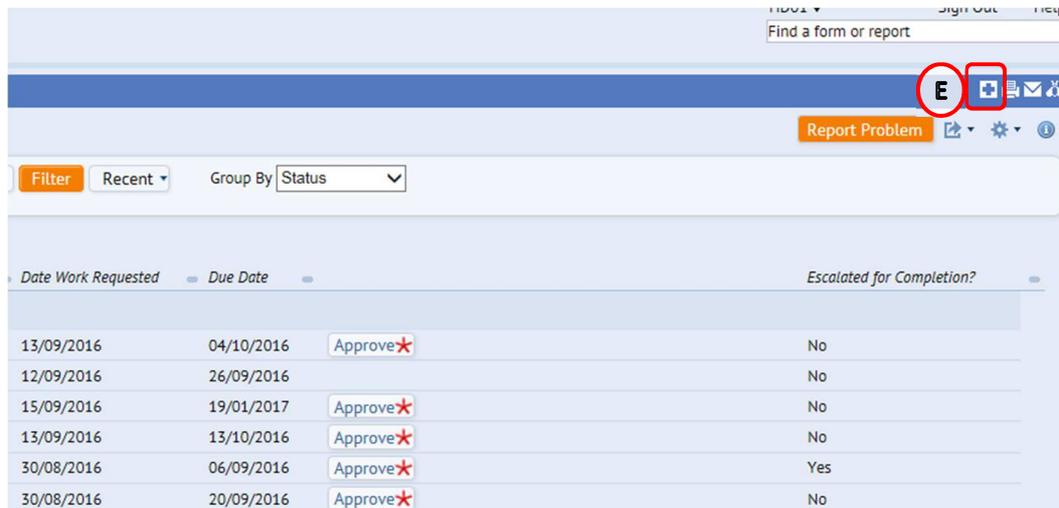
To make something appear further to the left on the Building Operations Console screen, move it higher up the list. Alternatively, to appear further to the right, move it lower down the list.



When you have amended the visible fields, select the **(D) Update** option, which will save the options selected, close the **Select Fields** pop up screen and return you to the Building Operations Console screen.

(Note: Selecting Cancel will not save any amendments, close the **Select Fields** pop up screen and return you to the Building Operations Console screen).

To save your preferred console setup select **(E)** icon, and confirm yes.



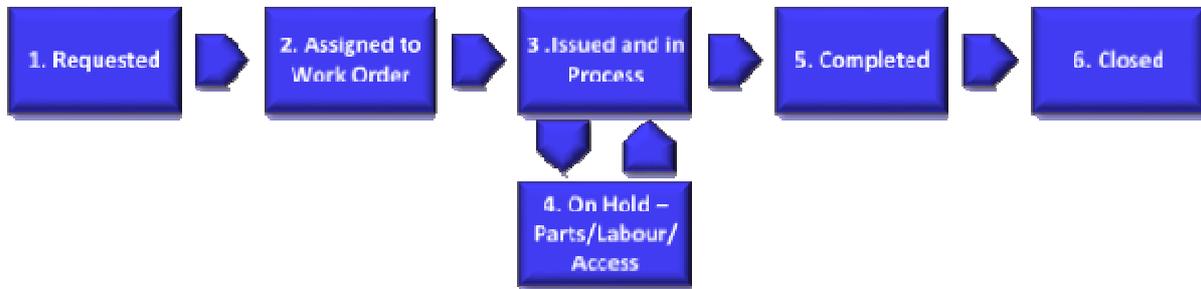
The following tables provide a recommended Building Operations Console screen layout:

<p>Helpdesk Operators</p> <ul style="list-style-type: none"> • Building Name • Work Request Code • Problem Type • Work Description • Priority • Due Date • Action buttons 1 – 5 • Work Team Code 	<p>Supervisor</p> <ul style="list-style-type: none"> • Building Name • Work Request Code • Problem Type • Requested By • Work Description • Assigned To • Due Date • Action buttons 1 – 5 • Escalated for Completion 	<p>Customer</p> <ul style="list-style-type: none"> • Building Name • Work Request Code • Problem Type • Floor • Work Team Code • Assigned To • Date Work Requested • Due Date • Action buttons 1 – 5 • Escalated for Completion
<p>Alternative fields</p>		
<ul style="list-style-type: none"> • Location • Supervisor • Status • Requested By • Work Request • PM Procedure • PM Schedule Code • Division • Department • Site • Building • Floor • Room • Equipment • Work Type • Assigned To • Date Work Requested • Date To Perform • Date Work Completed • Service Request Code • Work Team Code 	<ul style="list-style-type: none"> • Location • Supervisor • Status • Work Request • PM Procedure • PM Schedule Code • Division • Department • Site • Building • Floor • Room • Equipment • Work Type • Date Work Requested • Date To Perform • Date Work Completed • Service Request Code • Work Team Code 	<ul style="list-style-type: none"> • Location • Work Description • Supervisor • Status • Requested By • Work Request • PM Procedure • PM Schedule Code • Division • Department • Site • Building • Equipment • Work Type • Date To Perform • Date Work Completed • Service Request Code

APPENDIX B**2.2 Appx B: Work Request Life Cycle**

As your work request progresses through different stages, the status will be updated accordingly.

There are 5 key statuses, with an additional optional status



1. **Requested:** The Work Request has been raised by the customer and assigned to the Helpdesk to assess prior to issuing to a work team.
2. **Assigned to Work Order:** The Work Request is now being assigned to the correct Work Team awaiting scheduling to a craftsperson, until this has been done work cannot begin on the request.

Note: a Work Team may reassign to another Work Team while at this status

3. **Issued and in Process:** The Work Request is now with a Craftsperson and ready to work.
4. **On Hold – Parts/Labour/Access (Optional):** A Work Request can be put on hold for one of the noted circumstances.
5. **Completed:** The work pertaining to the Work Request has been completed. At this stage the Customer Survey will become available for completion.
6. **Closed:** When you close out work requests, the work is no longer included the Open Work Requests reports as these have been Archived to history tables. This will happen automatically after a minimum period of two weeks.

2.2.1 Valid Moves & Reasons to Change Work Request Status**Valid Changes**

Complete/On Hold —————> Issued. If complete in error/Returning to work

Issued —————> Assigned. If issued in error

Assigned —————> Requested. If priority/location/problem type needs amended

Do not return to requested if has been issued in error

2.3 Processing Batched Work Requests

The system also allows the mangment of work requests to be carried out in batches or groups of work requests.

From the Building Operations Console screen, select the **(A) Tick Boxes** next to the work requests that you wish to action.



The **(B) Action Buttons** will be replicated at the top of the screen, that will allow you to process the selected group of work requests for the required action.

(NOTE: depending on how the information is displayed on the screen, you may need to scroll up to be able to view the new options that appear at the top of the screen)

Once the grouped action has been completed, you can de-selected the ticked work requests by removing the tick, or selecting and de-selecting the **(C) Group Tick Box**.

2.4 Useful Prefixes

The table below shows some of the more common prefixes added to Work Requests by the Helpdesk. This is not an exhaustive list as adhoc prefixes can be used from time to time.

Prefix	Detail
EMERG	Highlights the priority of Work Request as Emergency
URG	Highlights the priority of Work Request as Urgent
5	Highlights the priority of Work Request as 5 Day
**5*	Highlights the priority of Work Request as 5 Day – originally Urgent
15	Highlights the priority of Work Request as 15 Days
dd/mm/yy	Highlights a specific date Work Request required to be completed by
CS	Work Request FAO Contract Services
FMS	Work Request requires FMS attendance – arranged by Helpdesk
LIFT	Work Request requires Lift Maintenance attendance – arranged by Helpdesk
PEST	Work Request requires Pest Control attendance – arranged by Helpdesk
GRAFF	Work Request requires CEC attendance – arranged by Helpdesk
FH	Work Request requires Fume Hood Maintenance attendance – arranged by Helpdesk
BS	Work Request FAO Building Services
KEYS	Work Request FAO Keys Department
FSU	Work Request FAO Fire Safety Unit
FEST	Work Request FAO Festivals Team
SS	Work Request FAO Soft Services
RECHARG	Highlights possible rechargeable work

