



Estates and Buildings Information System

User Guide

Web Central v23

ATL/Supervisor

*Reviewing A Team Work Request
List, Assigning To A Craftsperson,
And Completing 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.

Contents

1.0	Reviewing a Team Work Request List and Assigning To a Craftsperson	5
1.1.	Purpose	5
1.2.	Accessing the Building Operations Console	5
1.3.	Reviewing a Work Request	7
1.3.1.	Displaying the work request pop-up screen	7
1.3.2.	Viewing More Information	9
1.3.3.	Returning a Work Request	10
1.3.4.	Viewing A Floorplan	11
1.3.5.	Viewing And Adding Documents/ Attachments	12
1.3.6.	Viewing And Adding Comments	14
1.3.7.	Viewing The Work Request History	15
1.3.8.	Rechargeable Work in a Non-Rechargeable Building	15
1.3.9.	Linking A Work Request (Follow on Work)	16
1.4.	Forwarding A Work Request To Another Team	21
1.5.	Assigning A Craftsperson To A Work Request	24
1.6.	Issuing The Work Request To The Craftsperson	27
1.7.	Placing A Work Request On Hold	28
1.8.	Resuming A Held Work Request	29
1.9	Completing a Work Request – ATL (For Supervisors skip to Section 2.0)	31
1.10	Completing a Work Request – Supervisor	36
1.11	Verifying a WR	39
1.12	Cancelling a WR	40
1.12.1	Cancelling Preventative Maintenance Work Requests	40
	APPENDIX A	42
2.1	Using filter & amending columns - Building Operation Console Screen	42
2.1.1	Using Filters	42
2.1.2	Sorting Column & fields	44
2.1.3	Using the Group By Option	45
2.1.4	Amending Columns - Building Operations Console	47
	APPENDIX B	50
2.2.	Work Request Life Cycle	50
2.2.1.	Valid Moves & Reasons to Change Work Request Status	50
2.2.3	Processing Batched Work Requests	51
2.2.4	Printing Work Requests If Mobile App Is Out Of Operation	52

Document Version Control

Date	Owner	Version	Update
1Aug16	Ben Mawson-Mole	V1.0	Initial Version
20Oct16	Ben Mawson-Mole	V1.1	Incremental Update: Removing reference to completing a WR
28Nov 17	Colin Pritchard	V1.2	V23 update
20 Aug 2019	Eileen Mullan	V1.3	Second Version – General Review
27/11/2020	Eileen Mullan	V1.4	General Review
12/11/2021	Eileen Mullan	V1.5	P&M Process update
09/12/2022	Eileen Mullan	V1.6	1.3.7 Updated 1.9 New section on Adding Parts Various screenshots updated
05/09/2023	Eileen Mullan	V1.7	1.11 Verifying a WR added Numbering and contents table updated
20/08/2024	Eileen Mullan	V1.8	1.3.3 Returning a Work Request separated and expanded

1.0 Reviewing a Team Work Request List and Assigning to a Craftsperson

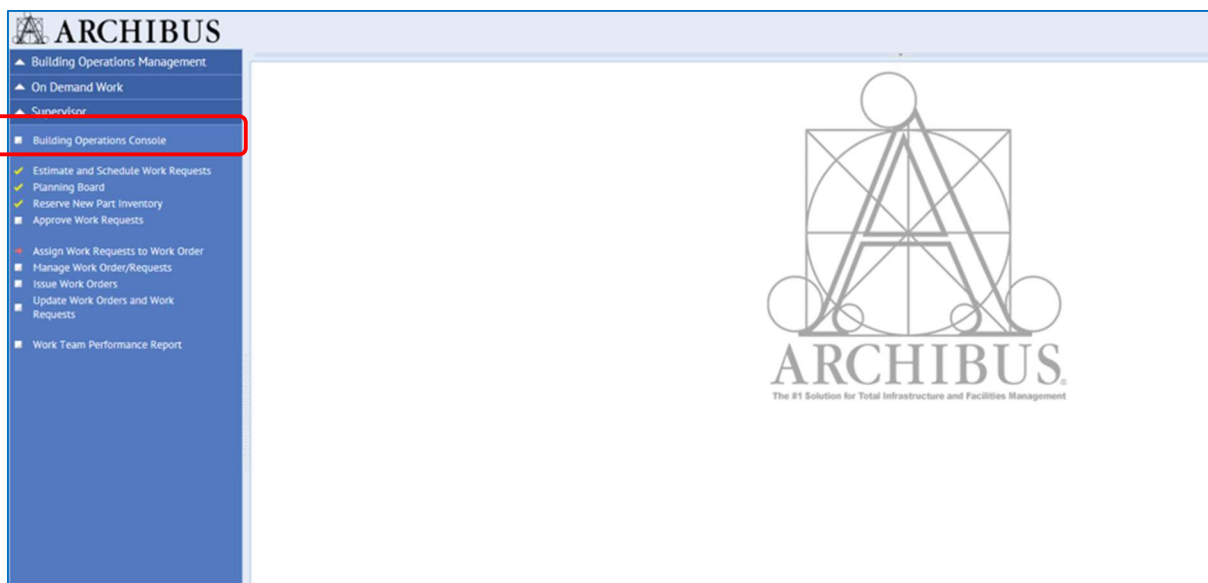
1.1 Purpose

This user guide is for Area Team Leaders and Supervisors and shows the different steps needed to complete the following activities:

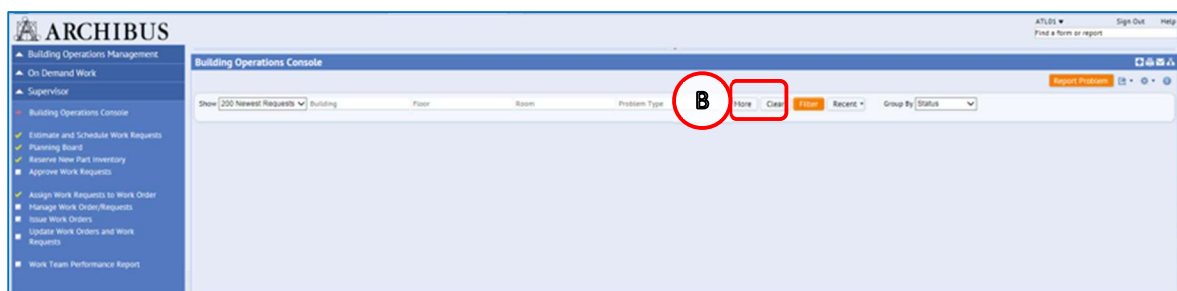
- Access the Building Operations Console to view Work Requests assigned to a specific work team queue
- Reviewing a Work Request
- Forwarding to another work team queue
- Assigning to a craftsperson(s)
- Completing a Work Request
- Cancelling a Work Request

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.

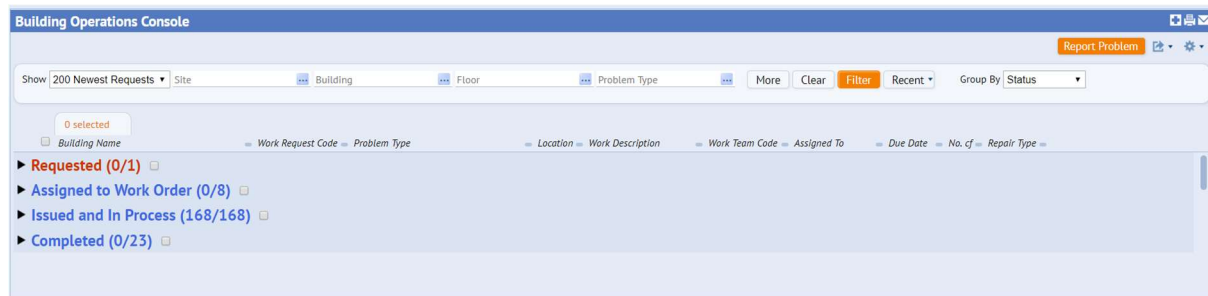


(See **Appx A** to review the filters and column setup for the Building Operations Console page)

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)

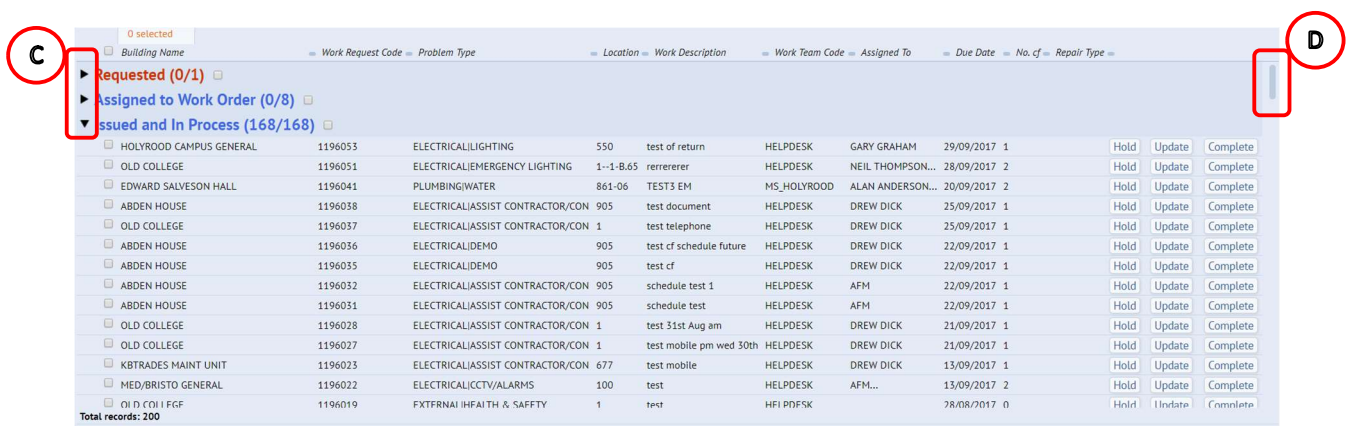
The page will load with the status bands collapsed, but indicating how many requests are in each band (number loaded/number in section).



The following 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. Please note

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

▶ Rejected (0/2) <input type="checkbox"/>								
▼ Requested (1/1) <input type="checkbox"/>								
<input type="checkbox"/>	INFIRMARY ST,09-11	1196054	ELECTRICAL EMERGENCY LIGHTING	305	Test		02/10/2017	0
▼ Assigned to Work Order (9/72) <input type="checkbox"/>								
<input type="checkbox"/>	INFIRMARY ST,09-11	1196062	ELECTRICAL LIGHTING	305-01-1.05	Light not working	HELPLESK	GARY GRAHAM	03/10/2017 1
<input type="checkbox"/>	ASHWORTH EXTENSION	1196060	GLAZING GLAZING REPAIR	644-02-2.05A	11/09 EM TEST	MS_HOLYROOD		26/09/2017 0
<input type="checkbox"/>	OLD COLLEGE	1196050	ELECTRICAL EMERGENCY LIGHTING	1--1-B.65	rererereer	HELPLESK	GARY GRAHAM...	28/09/2017 5
<input type="checkbox"/>	ABDEN HOUSE CAR PARK	1196047	ELECTRICAL ASSIST CONTRACTOR/CON	6905	test	MS_POLLOCK		27/09/2017 0
<input type="checkbox"/>	OLD COLLEGE	1196046	ELECTRICAL EMERGENCY LIGHTING	1--1-B.04	test	HELPLESK		27/09/2017 0
<input type="checkbox"/>	FORREST RD,41	1196045	GLAZING GLAZING REPAIR	106-00	TEST6 EM	HELPLESK	AARON WILSON...	27/09/2017 3
<input type="checkbox"/>	ENG SANDERSON BLD	1196043	ELECTRICAL HEATING	601-02	TEST4 EM	HELPLESK		20/09/2017 0
<input type="checkbox"/>	ALISON HOUSE	1196034	BLINDS CURTAINS NEW INSTALLATION	110	test mob1	HELPLESK	AFM...	05/01/2018 2
<input type="checkbox"/>	OLD COLLEGE	1196018	ELECTRICAL ASSIST CONTRACTOR/CON	1	test	HELPLESK		04/09/2017 0
▶ Issued and In Process (108/108) <input type="checkbox"/>								
<input type="checkbox"/>	FLOWAVE TT BUILDING	1196061	PLUMBING FLOOD	676-01-1.23	11/09 TEST EM	MS_HOLYROOD	BOBBY LONNIE...	18/09/2017 2
<input type="checkbox"/>	THOMSONS LAND	1196055	FLOORING DOOR MATS	555	**T*VERIFICATION TEST	CS_CENTRAL	BOBBY LONNIE...	15/01/2018 2
<input type="checkbox"/>	HOLYROOD CAMPUS GENERAL	1196053	ELECTRICAL LIGHTING	550	test of return	HELPLESK	GARY GRAHAM	29/09/2017 1
<input type="checkbox"/>	OLD COLLEGE	1196051	ELECTRICAL EMERGENCY LIGHTING	1--1-B.65	rererereer	HELPLESK	NEIL THOMPSON...	28/09/2017 2
<input type="checkbox"/>	EDWARD SALVESON HALL	1196041	PLUMBING WATER	861-06	TEST3 EM	MS_HOLYROOD	ALAN ANDERSON...	20/09/2017 2
<input type="checkbox"/>	ABDEN HOUSE	1196038	ELECTRICAL ASSIST CONTRACTOR/CON	905	test document	HELPLESK	DREW DICK	25/09/2017 1
<input type="checkbox"/>	OLD COLLEGE	1196037	ELECTRICAL ASSIST CONTRACTOR/CON	1	test telephone	HELPLESK	DREW DICK	25/09/2017 1

If you wish to view more than 50 records, select 'Show Next' at bottom of screen

1.3. Reviewing a Work Request

Before accepting or assigning a **Work Request**, you may need to review the details.

1.3.1. Displaying the work request pop-up screen

Navigate to the **Assigned to Work Order** section of the **Building Operations Console** page.

(See **Appendix B Using Filters** for further guidance on how to use specific criteria to perform a search)

0 selected

<input type="checkbox"/> Building Name	<input type="checkbox"/> Work Request Code	<input type="checkbox"/> Problem Type	<input type="checkbox"/> Location	<input type="checkbox"/> Work Description
▶ Rejected (0/2) <input type="checkbox"/>				
▼ Requested (1/1) <input type="checkbox"/>				
<input type="checkbox"/> INFIRMARY ST,09-11	1196054	ELECTRICAL EMERGENCY LIGHTING	305	Test
▼ Assigned to Work Order (9/9) <input type="checkbox"/>				
<input type="checkbox"/> INFIRMARY ST,09-11	1196062	ELECTRICAL LIGHTING	305-01-1.09	Light not working
<input type="checkbox"/> OLD COLLEGE	1196050	ELECTRICAL EMERGENCY LIGHTING	1--1-B.65	rererereer
<input type="checkbox"/> ABDEN HOUSE CAR PARK	1196047	ELECTRICAL ASSIST CONTRACTOR/CON	6905	test
<input type="checkbox"/> OLD COLLEGE	1196046	ELECTRICAL EMERGENCY LIGHTING	1--1-B.65	test
<input type="checkbox"/> FORREST RD,41	1196045	GLAZING GLAZING REPAIR	106-00	TEST6 EM
<input type="checkbox"/> ENG SANDERSON BLD	1196043	ELECTRICAL HEATING	601-02	TEST4 EM
<input type="checkbox"/> ALISON HOUSE	1196034	BLINDS CURTAINS NEW INSTALLATION	110	test mob1
<input type="checkbox"/> OLD COLLEGE	1196018	ELECTRICAL ASSIST CONTRACTOR/CON	1	test
<input type="checkbox"/> INFIRMARY ST,09-11	1196016	CLEANING CARPET SHAMPOO	305	gfgfdgfd
▶ Issued and In Process (164/164) <input type="checkbox"/>				
▶ Completed (0/24) <input type="checkbox"/>				

To view the details of an individual record, click on the **(A) Work Request** reference.

The system will display the **Work Request** pop up screen.

Work Request

Problem

Work Request Code: 1196062 Problem Type: ELECTRICAL/LIGHTING

Description: Light not working

Problem Location: MAIN LIGHT IN THE ROOM

▶ More Information
▶ Reference Material
▶ Comments
▶ History
▶ Trades
▶ Parts
▶ Craftspersons
▶ Tool Types
▶ Tools
▶ Other Costs

Estimated Costs

Estimated Cost of Labour	0.00
Estimated Cost of Parts	0.00
Estimated Cost of Tools	0.00
Estimated Other Costs	0.00
Estimated Total Cost	0.00

Actual Costs

Cost of Labour	0.00
Cost of Parts	0.00
Cost of Other Parts	0.00
Other Costs	0.00
Total Cost	0.00

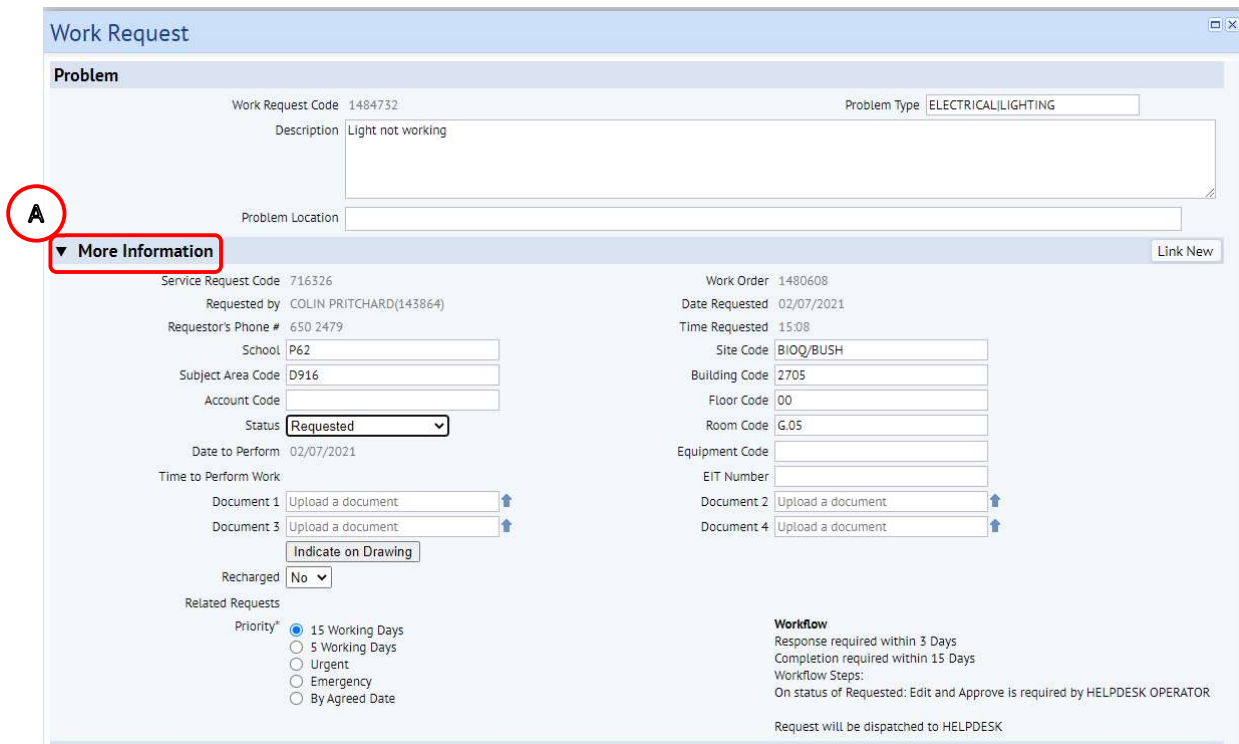
Update Request Forward Request Close

The **(B) Problem** section of the pop up screen will always be displayed, and will display the description and problem location free text added by the Customer.

The following will help explain the different information you can view, or add, from this pop up screen.

1.3.2. Viewing More Information

Expand the **(A) More Information** section.



The screenshot displays the 'Work Request' form. The 'Problem' section at the top includes fields for 'Work Request Code' (1484732), 'Problem Type' (ELECTRICAL/LIGHTING), 'Description' (Light not working), and 'Problem Location'. Below this, the 'More Information' section is expanded, revealing two columns of data. The left column contains fields for 'Service Request Code' (716326), 'Requested by' (COLIN PRITCHARD(143864)), 'Requestor's Phone #' (650 2479), 'School' (P62), 'Subject Area Code' (D916), 'Account Code', 'Status' (Requested), 'Date to Perform' (02/07/2021), 'Time to Perform Work', 'Document 1' and 'Document 3' (both with 'Upload a document' buttons), 'Indicate on Drawing' button, 'Recharged' (No), and 'Related Requests' with a 'Priority*' section. The right column contains fields for 'Work Order' (1480608), 'Date Requested' (02/07/2021), 'Time Requested' (15:08), 'Site Code' (BIOQ/BUSH), 'Building Code' (2705), 'Floor Code' (00), 'Room Code' (G.05), 'Equipment Code', 'EIT Number', 'Document 2' and 'Document 4' (both with 'Upload a document' buttons). At the bottom right, a 'Workflow' section states: 'Response required within 3 Days', 'Completion required within 15 Days', 'Workflow Steps: On status of Requested: Edit and Approve is required by HELPDESK OPERATOR', and 'Request will be dispatched to HELPDESK'. A red circle with the letter 'A' is placed over the 'More Information' tab header.

Problem	
Work Request Code	1484732
Problem Type	ELECTRICAL/LIGHTING
Description	Light not working
Problem Location	

More Information	
Service Request Code	716326
Requested by	COLIN PRITCHARD(143864)
Requestor's Phone #	650 2479
School	P62
Subject Area Code	D916
Account Code	
Status	Requested
Date to Perform	02/07/2021
Time to Perform Work	
Document 1	Upload a document
Document 3	Upload a document
Indicate on Drawing	
Recharged	No
Related Requests	
Priority*	<input checked="" type="radio"/> 15 Working Days <input type="radio"/> 5 Working Days <input type="radio"/> Urgent <input type="radio"/> Emergency <input type="radio"/> By Agreed Date
Work Order	1480608
Date Requested	02/07/2021
Time Requested	15:08
Site Code	BIOQ/BUSH
Building Code	2705
Floor Code	00
Room Code	G.05
Equipment Code	
EIT Number	
Document 2	Upload a document
Document 4	Upload a document

Workflow
Response required within 3 Days
Completion required within 15 Days
Workflow Steps:
On status of Requested: Edit and Approve is required by HELPDESK OPERATOR
Request will be dispatched to HELPDESK

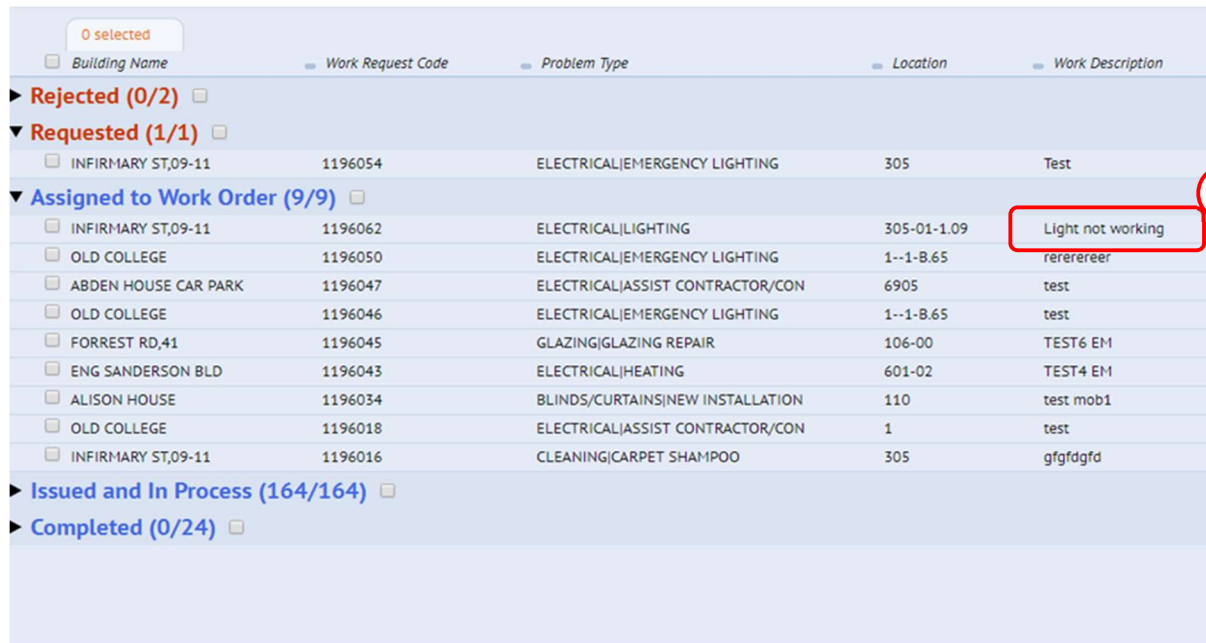
This section highlights additional details for the Work Request, such as the current status or if the work is rechargeable.

If you need to update the parameters of a work request after approval, the request must be returned to **REQUESTED** status in order for Helpdesk to update these. Requests can also be returned to an earlier point in the workflow for other reasons. See [Appendix B](#) for valid moves & reasons to change Work Request Status.

1.3.3. Returning a Work Request

When Returning a Work Request to the Helpdesk for editing, it is important to firstly add a prefix of ***RET*** into the "Work Description" as this will help highlight to Helpdesk Technicians, that an HD action is required.

To add this, open up the text from the console view by clicking on the **(A) Work Description**

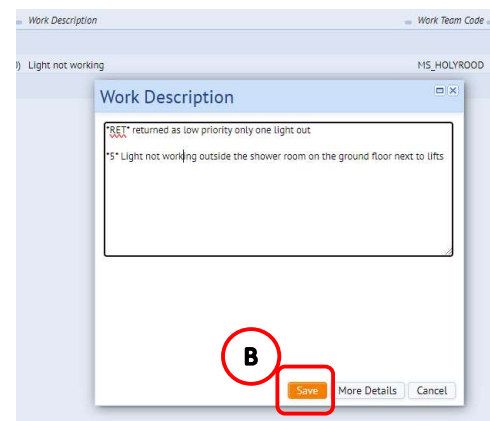


Building Name	Work Request Code	Problem Type	Location	Work Description
Rejected (0/2)				
Requested (1/1)				
INFIRMARY ST,09-11	1196054	ELECTRICAL EMERGENCY LIGHTING	305	Test
Assigned to Work Order (9/9)				
INFIRMARY ST,09-11	1196062	ELECTRICAL LIGHTING	305-01-1.09	Light not working
OLD COLLEGE	1196050	ELECTRICAL EMERGENCY LIGHTING	1--1-B.65	rererereer
ABDEN HOUSE CAR PARK	1196047	ELECTRICAL ASSIST CONTRACTOR/CON	6905	test
OLD COLLEGE	1196046	ELECTRICAL EMERGENCY LIGHTING	1--1-B.65	test
FORREST RD,41	1196045	GLAZING GLAZING REPAIR	106-00	TEST6 EM
ENG SANDERSON BLD	1196043	ELECTRICAL HEATING	601-02	TEST4 EM
ALISON HOUSE	1196034	BLINDS CURTAINS NEW INSTALLATION	110	test mob1
OLD COLLEGE	1196018	ELECTRICAL ASSIST CONTRACTOR/CON	1	test
INFIRMARY ST,09-11	1196016	CLEANING CARPET SHAMPOO	305	gfgfdgfd
Issued and In Process (164/164)				
Completed (0/24)				

This will open up the work description box. Now follow the steps below in order

- Add Prefix ***RET***
- Include reason why the request is being Returned
- Before saving, highlight and copy (right click mouse) the RET Info you have just added.
- Hit **(B) Save**

The Work Request Description should now be update with the new information.



Work Description

Light not working

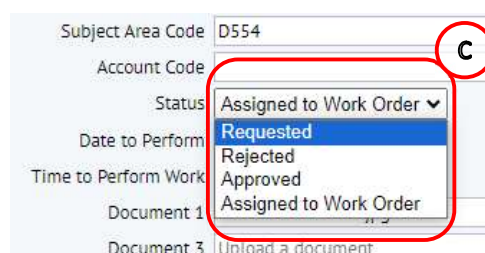
Work Team Code: H5_HOLYROOD

RET returned as low priority only one light out

5 Light not working outside the shower room on the ground floor next to lifts

B Save More Details Cancel

Now re-open the Work Request as described above (1.3.1) and view more information (1.3.2). You can now change the status step of the work request to **REQUESTED** by selecting the drop-down menu **(C) Status**



Subject Area Code: D554

Account Code:

Status: Assigned to Work Order ▼

Date to Perform:

Time to Perform Work:

Document 1:

Document 3: Upload a document

C Requested

(Note: Please see [Appendix B] to view the work request life cycle)

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

You are now required to add **(D) Comments**. Either paste (right click mouse) the RET Info you added in the Work Description field, or retype the reason for returning the request, and then select **(E) Update Request** to complete the change in status step.

(NOTE: Selecting Cancel will return you to the **Work Request** pop up screen with no changes made.)

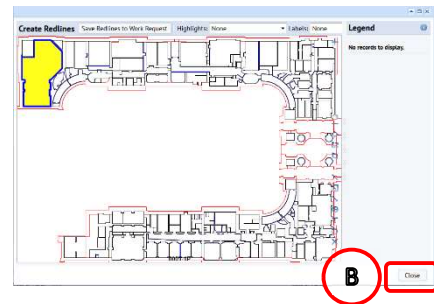
1.3.4. Viewing A Floorplan

There is an option that can display the floor plan for the location attached to the work request. Due to changes Flash Drive in 2021, floorplans are only viewable if using the Harman browser. This can be downloaded from the software centre if needed.

In the **More Information** [1.3.2](#) section, select the **(A) Indicate On Drawing** option.

The system will display a floor plan pop up screen, and highlight the room associated with the work request in yellow.

Select the **(B) Close** option and the system will return you to the **Work Request** screen.



1.3.5. Viewing And Adding Documents/ Attachments

There is an option to view or upload documents to the **Work Request**.

Attached documents will be visible towards the bottom of the **More Information** [\(1.3.2\)](#) section **(A) Document**.

Selecting the **(B) Page Icon/checkout Document** will allow you to view the document in a pop-up screen.

(NOTE: Check out Document (down arrow) works better for large pictures)

More Information Link New

Service Request Code: 716326
 Requested by: COLIN PRITCHARD(143864)
 Requestor's Phone #: 650 2479
 School: P62
 Subject Area Code: D916
 Account Code:
 Status: Requested
 Date to Perform: 02/07/2021
 Time to Perform Work:
 Document 1: wr-1484732-doc1.pdf
 Document 2: wr-1484732-doc3.pdf
 Indicate on Drawing
 Recharged: No
 Related Requests
 Priority: 15 Working Days
 5 Working Days
 Urgent
 Emergency
 By Agreed Date

Work Order: 1480608
 Date Requested: 02/07/2021
 Time Requested: 15:08
 Site Code: BIOQ/BUSH
 Building Code: 2705
 Floor Code: 00
 Room Code: G.05
 Equipment Code:
 EIT Number:
 Document 2: Upload a document
 Document 4: Upload a document

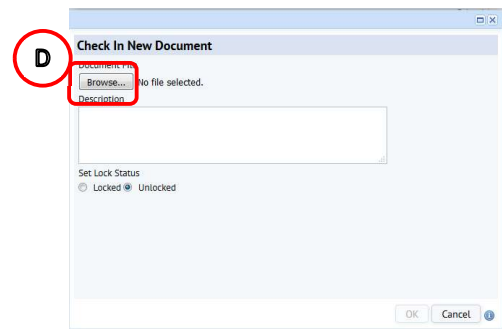
Workflow
 Response required within 3 Days
 Completion required within 15 Days
 Workflow Steps:
 On status of Requested: Edit and Approve is required by HELPDASK OPERATOR
 Request will be dispatched to HELPDASK

If you wish to upload a document, find a blank Upload A Document field and select the **(C) Upload Arrow** icon

(NOTE: when uploading a document, you will need to have the item saved to a location you can access)

The system will display the **Check In New Document** pop up screen.

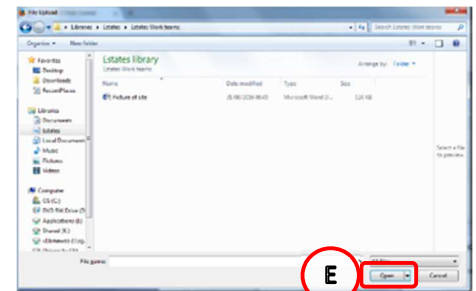
Select the **(D) Browse** option.



The system will then display the standard Microsoft **File Browser** pop up screen.

Navigate to the required file and either double click on it or select the **(E) Open** option.

The system will then select the chosen file, close the **File Browser** Pop up screen and return you to the **Check In New Document** pop up screen.



(NOTE: Selecting the Close option will close the **File Browser** pop up screen and return you to the **Check In New Document** pop up screen without taking any action)

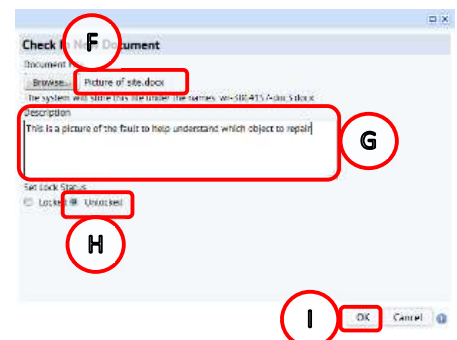
The **Check In New Document** pop up screen will now show **(F) display the file selected for attaching** to the work request.

It is important to add **(G) A Description** to help explain the nature of the attached document.

Ensure the set lock status **(H) Unlocked** option has been selected

Then select the **(I) Ok** option.

The system will then upload the document and description to the work request, close the **Check In New Document** pop up screen and return you to the **Work Request** screen.



1.3.6. Viewing And Adding Comments

There is an option to view or add any comments for a **Work Request**.

It is important to record comments in order to capture all updates and amendments to a work request, this provides a date & time stamped record of all actions taken

(**NOTE:** if you are making any amendments to a work request, it is important to add a comment, as this will help support why you performed the action).

Expand the **(A) Comments** section.

This section highlights any additional comments added to the **Work Request**.

To add any new comments, select the **(B) Add** option.

The system will display the **Add Comments** pop up screen.

Enter any narrative in the **(D) Comments** field, and then select the **(E) Save** option.

The system will record the narrative to the work request, close the **Add Comments** pop up screen and return you to the **Work Request** screen.

(**NOTE:** if you select the Close option, the system will close the Add Comments pop up screen without saving the narrative)

To view any existing comments, hover your mouse over **(C) Comments** column to see comments previously recorded in full.

Note: All comments are viewable to the customer

1.3.7. Viewing The Work Request History

There is an option to view the work request history.

Expand the **(A) History** section, this shows a history log of the Work Request to date.

Hover your mouse over the **(B) Comments Field** to see comments recorded by member of Estates staff who has updated a work request.

This field contains comments from a status change, or updates by the Helpdesk from the approval step.

(NOTE: please note this cannot be seen by the Craftsperson when they receive the work request to a handheld device but are still viewable to the customer)

Step Responded By	On	Workflow Step	Status	Step Status After	Comments
	12/08/2016 10:36	Basic	Requested	None	
	12/08/2016 10:37	Edit and Approve	Requested	Approved	
	12/08/2016 10:37	Basic	Approved	None	
	12/08/2016 10:37	Basic	Assigned to Work Order	None	
ATL01	12/08/2016 10:38	Forward to Supervisor	Assigned to Work Order	None	

1.3.8. Rechargeable Work in a Non-Rechargeable Building

If a work request is rechargeable to the customers department, and the customer is not based in a building which is on a rechargeable model, this will need to be captured in the work request to allow Estates Finance to retrieve the amounts from other Schools/Colleges (previous eIT process).

If the customer knows in advance that they should pay for their request, they can include their P&M charge of accounts code string (CoA) when raising a work request. This will then be viewable in the **(A) Description**.

Work Request Code: 1543036 Problem Type: JOINERY/FIXTURES & FITTINGS

Description: 5 coat hooks to be inserted on raised area of wall next to door of office. Please provide costs to site.

(A) 110.110002.40088023.2954.101421.10000100.00000000.000.000000.000000

If the customer is not aware, the Helpdesk team will attempt to identify any rechargeable work during the approval step. They will then flag this via their

approval comments in **(B) History** section, and via **(C) Works Description** adding the prefix code *RECHARG* before passing to the relevant Estates Team to progress.

The screenshot shows the 'Work Request' interface. On the left, the 'History' section is expanded, showing a table of work request history. A red circle labeled 'B' highlights the 'History' section header. On the right, the 'Assigned to Work Order' section is expanded, showing a table of assigned work orders. A red circle labeled 'C' highlights the 'Assigned to Work Order' section header.

The customer should then be contacted by the ATL/Supervisor out with the system to agree a cost estimate and timescale, and to confirm they wish to proceed. The customer will then be required to provide their CoA codes to ATL/Supervisor 1 before work can proceed.

The CoA should then be entered by the ATL/Supervisor into **(D)Description** and **(E)Comments** within the work request pop up screen, ensuring the drop down **(F)Recharged** is also set to YES.

The screenshot shows the 'Work Request' interface. At the top, the 'Description' field is highlighted with a red circle labeled 'D'. Below it, the 'More Information' section is expanded, showing various fields for the work request. A red circle labeled 'F' highlights the 'Recharged' dropdown menu, which is set to 'Yes'. At the bottom, the 'Comments' section is expanded, showing a table of comments. A red circle labeled 'E' highlights the 'Comments' section header.

1.3.9. Linking A Work Request (Follow on Work)

You can link two or more related work requests together, by creating a second or third new request.

This feature can be used where work request needs to be carried on by a different work team (e.g. Maintenance Services -> Contract Services). This might be because the work can't be completed by the original team (scale/expertise/complexity), or

there is an additional or consequential piece of work required that requires another work team to complete.

By creating a link from an existing request to a new request, you can set a new priority timescale and/or problem type for the new request.

To do this access the **Work Request** pop up screen of the existing request by selecting **(A) Work Request code**.

0 selected

<input type="checkbox"/> Building Name	<input type="checkbox"/> Work Request Code	<input type="checkbox"/> Problem Type	<input type="checkbox"/> Location	<input type="checkbox"/> Work Description
▶ Rejected (0/2) <input type="checkbox"/>				
▼ Requested (1/1) <input type="checkbox"/>				
<input type="checkbox"/> INFIRMARY ST,09-11	1196054	ELECTRICAL EMERGENCY LIGHTING	305	Test
▼ Assigned to Work Order (9/9) <input type="checkbox"/>				
<input type="checkbox"/> INFIRMARY ST,09-11	1196062	ELECTRICAL LIGHTING	305-01-1.09	Light not working
<input type="checkbox"/> OLD COLLEGE	1196050	ELECTRICAL EMERGENCY LIGHTING	1--1-B.65	rererereer
<input type="checkbox"/> ABDEN HOUSE CAR PARK	1196047	ELECTRICAL ASSIST CONTRACTOR/CON	6905	test
<input type="checkbox"/> OLD COLLEGE	1196046	ELECTRICAL EMERGENCY LIGHTING	1--1-B.65	test
<input type="checkbox"/> FORREST RD,41	1196045	GLAZING GLAZING REPAIR	106-00	TEST6 EM
<input type="checkbox"/> ENG SANDERSON BLD	1196043	ELECTRICAL HEATING	601-02	TEST4 EM
<input type="checkbox"/> ALISON HOUSE	1196034	BLINDS CURTAINS NEW INSTALLATION	110	test mob1
<input type="checkbox"/> OLD COLLEGE	1196018	ELECTRICAL ASSIST CONTRACTOR/CON	1	test
<input type="checkbox"/> INFIRMARY ST,09-11	1196016	CLEANING CARPET SHAMPOO	305	gfgfdgfd
▶ Issued and In Process (164/164) <input type="checkbox"/>				
▶ Completed (0/24) <input type="checkbox"/>				

Select **(B) More information** triangle, and then **(C) Link New**.

Problem	
Work Request Code	1196062
Problem Type	ELECTRICAL LIGHTING
Description	Light not working
Problem Location	MAIN LIGHT IN THE ROOM
<div> <div>▼ More Information</div> <div> <div>Link New</div> </div> </div>	
Service Request Code	424762
Requested by	COLIN PRITCHARD(143864)
Requestor's Phone #	650 2479
School	P62
Subject Area Code	D415
Account Code	
Status	Assigned to Work Order ▼
Date to Perform	12/09/2017
Time to Perform Work	
Work Order	1195055
Date Requested	12/09/2017
Time Requested	9:53
Site Code	HOLYROOD
Building Code	305
Floor Code	01
Room Code	1.09
Equipment Code	
EIT Number	

The **Report Related Problem** pop up screen then displays, allowing a new linked work request to be raised.

The parameters of the existing work request i.e. **(D) Location** and **(E) Problem Type** will pre-populate, however these can be changed if required.

Work Request

Problem

Work Request Code: 1196046 Problem Type: ELECTRICAL|EMERGENCY LIGHTING

Description: test

Problem Location:

More Information [Link New](#)

Service Request Code: 424746 Work Order: 1195042

Report Related Problem

Requestor

Requested By*: COLIN PRITCHARD(143864)

Requestor Phone: 650 2479

Location

☐ Use your assigned workspace location

(D) Location*: HOLYROOD 1 -1 B.04

Building is required. Enter floor and room number to help us process your request faster.

Describe the location: Enter the location specifically enough that maintenance can find it, such as "Problem is on back wall, below window."

Problem

(E) Type of Problem: ELECTRICAL

EMERGENCY LIGHTING

[View All Problem Types](#)

Estimated Costs

Estimated Cost of Labour	0.00
Estimated Cost of Parts	0.00
Estimated Cost of Tools	0.00
Estimated Other Costs	0.00
Estimated Total Cost	0.00

Actual Costs

Cost of Labour	0.00
Cost of Parts	0.00
Cost of Other Parts	0.00
Other Costs	0.00
Total Cost	0.00

[Update Request](#) [Forward Request](#) [Close](#)

F Description*

Select Description

EIT Number

G Priority*

- ☒ 15 Working Days
- ☐ 5 Working Days
- ☐ Urgent
- ☐ Emergency
- ☐ By Agreed Date

Workflow
 Response required within 3 Days
 Completion required within 15 Days
 Workflow Steps:
 On status of Requested: Edit and Approve is required by HELPDASK OPERATOR

H Request will be dispatched to HELPDASK

Submit Add Documents Cancel

Once you have finished completing the **Report Related Problem** form, including description (**F**) and priority (**G**), you should submit (**H**) the request. The request will then arrive with the Estates Helpdesk for approval and follow the normal workflow.

You can repeat these steps to link multiple new work requests to an existing request. All work requests should be managed and completed in the normal way.

You can view a linked work request by selecting the work request code in the (**I**) **Related Requests** field in the **More Information** section of the **Work Request** pop up screen.

Work Request

Problem

Work Request Code 1484732 Problem Type ELECTRICAL/LIGHTING

Description Light not working

Problem Location

More Information Link New

Service Request Code 716526

Requested by COLIN PRITCHARD(143864)

Requestor's Phone 650 2479

School P62

Subject Area Code D916

Account Code

Status Requested

Date to Perform 01/07/2021

Time to Perform Work

Document 1 wr-1484732-doc1.pdf

Document 2 wr-1484732-doc3.pdf

Indicate on Drawing

I Recharged No

Related Requests 1543334

Priority

- ☒ 15 Working Days
- ☐ 5 Working Days
- ☐ Urgent
- ☐ Emergency
- ☐ By Agreed Date

Workflow
 Response required within 3 Days
 Completion required within 15 Days
 Workflow Steps:
 On status of Requested: Edit and Approve is required by HELPDASK OPERATOR

Request will be dispatched to HELPDASK

Reference Material

When selected the **Work Request** pop up screen of the linked request is displayed.

Work Request

Problem

Work Request Code: 1359215
 Problem Type: ELECTRICAL/EMERGENCY LIGHTING
 Description: *15* linked wr faults numbers: 169, 170, 172 Also lights 189, 281, 282, 283, 284, 334, 337 never came on during testing. They don't appear to be on a keyswitch. Possible contractors haven't installed correctly.
 Problem Location:

More Information

Work Request Code: 1348805
 Problem Type: PREVENTIVE MAINT
 Description: PPM Carry out Monthly Emergency Lighting Checks (Compliance Group)
 MONTHLY
 Problem Location:

More Information

Service Request Code: 579561
 Requested by: STUART BAIN(176714)
 Requestor's Phone #:
 School:
 Subject Area Code:
 Account Code:
 Status: Issued and In Process
 Date to Perform: 30/07/2019
 Time to Perform Work:
 PM Procedure: SFG-37-01-C-M
 Document 1: Upload a document
 Document 3: Upload a document
 Indicate on Drawing
 Related Requests: 1359215

Work Order: 1346138
 Date Requested: 19/06/2019
 Time Requested: 9:35
 Site Code: HOLYROOD
 Building Code: 335
 Floor Code:
 Room Code:
 Equipment Code:
 EIT Number:
 PM Schedule Code: 37102
 Document 2: Upload a document
 Document 4: Upload a document

Action buttons: Filter In Console, Update Request, Forward Request, Close

At the bottom of this screen, there are a number of **(J) Action buttons**, which do the following

- **Filter in Console**

This takes you back to the Building Operations Console, filtered to only display the related request.

- **Update Request**

This confirms any changes that you have made to the related request.

- **Forward Request**

This option allows the work request to be forwarded to another work team. See section [1.4 Forwarding A Work Request To Another Team](#).

- **Close**

This closes the related work request view, and returns you to the original request.

1.4. Forwarding A Work Request To Another Team

If a work request has been incorrectly assigned to your work team queue, you can forward it to another work team queue, provided no action has taken place and no one has been assigned.

(NOTE: before starting this action, see [section 1.3.5 Viewing And Adding Comments.](#))

It is important to add a comment to support why you are re-assigning the work request to another team **before** your forward it on.

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

▼ Requested <input type="checkbox"/> (6)					
<input type="checkbox"/>	3864131	JOINERYDOORS AND LOCKS	3203	key wont work in lock	Approve★
<input type="checkbox"/>	3864004	JOINERYDOORS AND LOCKS	1--1-B.28	Padlock has broken.	Approve★
<input type="checkbox"/>	3863945	JOINERYDOORS AND LOCKS	1--1-B.L01	Test	Approve★
<input type="checkbox"/>	3863851	JOINERYDOORS AND LOCKS	1--1-B.11	cnhghghghghghghghgh	Approve★
<input type="checkbox"/>	3863850	JOINERYDOORS AND LOCKS	1-00-G.102	main room door hinge is loose	Approve★
<input type="checkbox"/>	3863231	JOINERYDOORS AND LOCKS	1--1-B.22	Second test with EASE authentication on Test - ...	Approve★
▼ Assigned to Work Order <input type="checkbox"/> (12)					
<input type="checkbox"/>	3864125	JOINERYDOORS AND LOCKS	552	faulty lock	Estimate Schedule Issue Cancel
<input type="checkbox"/>	3864114	JOINERYDOORS AND LOCKS	1	Door Lock Faulty Room 1	Estimate A Schedule Issue Cancel
<input type="checkbox"/>	3864126	JOINERYDOORS AND LOCKS	256	Door closer faulty	Estimate Schedule Issue Cancel
<input type="checkbox"/>	3863978	JOINERYDOORS AND LOCKS	1--1-B.Z62	scenario test EM replace handle on door	Estimate Schedule Issue Cancel
<input type="checkbox"/>	3864006	JOINERYDOORS AND LOCKS	1--1-B.Z26	lock not working properly	Estimate Schedule Issue Cancel
<input type="checkbox"/>	3863194	JOINERYDOORS AND LOCKS	1--1-B.47	test at pollock	Estimate Schedule Issue Cancel
<input type="checkbox"/>	3863219	JOINERYDOORS AND LOCKS	1--1-B.L01	Test on 28/04/16 Then on 14 /7	Estimate Schedule Issue Cancel
<input type="checkbox"/>	3863196	JOINERYDOORS AND LOCKS	1-01-1.286	test SLAs set up	Estimate Schedule Issue Cancel
<input type="checkbox"/>	3863181	JOINERYDOORS AND LOCKS	1--1-B.57	Test 2	Estimate Schedule Issue Cancel
<input type="checkbox"/>	3863183	JOINERYDOORS AND LOCKS	1-00	TEST MASS	Estimate Schedule Issue Cancel
<input type="checkbox"/>	3863184	JOINERYDOORS AND LOCKS	305-00	TEST	Estimate Schedule Issue Cancel
<input type="checkbox"/>	3863186	JOINERYDOORS AND LOCKS	305	test	Estimate Schedule Issue Cancel

The system will display the following pop-up screen.

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

Schedule Work Request 3864114

Schedule requests to better plan and balance work for teams and craftspersons. You can change the schedule assignments until you issue the request.

▼ Trades

No records to display.

▼ Craftspersons

Assign Craftsperson

No records to display.

▼ Tools

Assign Tool

No records to display.

B Forward Close

(NOTE: If you select the **Close** option, you will be returned to the Building Operations Console page without taking any action).

The system will display the **Forward Work Request** pop up screen.

Forward Work Request 3864114

Supervisor

Work Team Code

C Save

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

You can select which team to forward to in 2 different ways:

i) Typing directly **Work Team Code** field, 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 only use the **Work Team Code** option, not the **Supervisor**)

Supervisor

Work Team Code

MS_BIOQ_EBUSH
MS_CENTRAL
MS_HOLYROOD
MS_KINGSB
MS_POLLOCK

Selecting **(D)** 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).

Select Value - Work Team Code

Work Team Code	Description
BLD_SERVICES	BLD_SERVICES
CS_ACE	CS_ACE
CS_CENTRAL	CS_CENTRAL
CS_KINGSB	CS_KINGSB
CS_MVM	CS_MVM
EBIS	EBIS
EST_DEVLOP	EST_DEVLOP
FESTIVAL	FESTIVAL
FIRE_SAFETY	FIRE_SAFETY
FURNITURE	FURNITURE
HD_G_L_PC	HD_G_L_PC
HD_OPS_ACCOM	Accom Services
HD_OPS_CENTRAL	Central Work Team

E **F** Close

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

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

Forward Work Request 3864114

Supervisor

Work Team Code

G Save

The Work Request will have disappeared from your Building Operations Console screen, and will now be visible in the respective Work Team queue.

A work request can also be forwarded at status **Issued and in Process**.

(Note: The preferred method for passing work to another team after actions have been taken is via Link New function, see [section 1.3.8 Linking A Work Request](#))

The screenshot shows the 'Building Operations Console' interface. On the left, a list of work requests is displayed, with the 'Issued and in Process (200/200)' filter selected. A red circle highlights the 'H' icon next to a request. The main panel shows the 'Work Request' details for request code 1216031, with a problem type of 'ELECTRICAL LIGHTING'. The 'Problem' section includes a description 'Main light out' and a location 'MAIN LIGHT'. Below this, there are sections for 'More Information', 'Reference Material', 'Comments', 'History', 'Trades', 'Parts', 'Craftpersons', 'Tool Types', 'Tools', and 'Other Costs'. The 'Update Work Request' section includes fields for 'Equipment Down (hours)', 'Current Equip. meter reading', 'Cause Code', and 'Repair Type'. A red circle highlights the 'Forward Request' button at the bottom right of the console.

To do this access the **Work Request** pop up screen of the existing request by selecting **(H) Work Request** code.

Then select **(I) Forward Request** button, and the system will display the **Forward Work Request** pop up screen.

The screenshot shows the 'Forward Work Request 3864114' pop-up screen. It has a title bar with the request number and standard window controls. The main area contains two input fields: 'Supervisor' and 'Work Team Code'. A red circle highlights the 'J' icon next to the 'Work Team Code' field. A 'Save' button is located at the bottom right of the screen.

Now repeat the previous steps to forward the work request to the correct work team using **(J) Work Team Code**.

1.5. Assigning A Craftsperson To A Work Request

A Work Request can be assigned to a single or multiple craftsperson, though initially we will focus on assigning to a single craftsperson.

Building Operations Console

Show: All Site Building Floor Problem Type More Clear Filter Recent Group By: Status

0 selected

Assigned to Work Order (14/1702)

Site	Building Name	Work Request Code	Problem Type	Location	Work Description	Work Team Code	Assigned To	Due Date	No. of	Repair Type	Estimate	Schedule	Issue	Cancel
CENTRAL	MEDICAL SCHOOL, TEVIOT	1559641	ELECTRICAL/AUTOMATIC DOORS	113	*URG* Main doors to doorway 4. People are unabh...	MS_CENTRAL		12/08/2019	0		Estimate	Schedule	Issue	Cancel
CENTRAL	BRISTOL PLACE, 19	1559633	JOINERY/SHELVING/NOTICE BOARDS	3004-01	*S* 19/2 Bristol Square - Pin board in bedroom 1...	MS_CENTRAL		05/08/2019	0		Estimate	Schedule	Issue	Cancel
CENTRAL	MEDICAL SCHOOL, TEVIOT	1559628	ELECTRICAL/LIGHTING	113-01	*S* Doorway 4 - Light out on main stairwell (L...	MS_CENTRAL		19/08/2019	0		Estimate	Schedule	Issue	Cancel
CENTRAL	BUCCLEUCH PLACE LANE ACCOM	1559627	JOINERY/WINDOWS	3006	*S* Buccleuch place lane block 5 flat 5 kitch...	MS_CENTRAL		05/08/2019	0		Estimate	Schedule	Issue	Cancel
CENTRAL	BUCCLEUCH PLACE LANE ACCOM	1559626	JOINERY/WINDOWS	3006	*S* Buccleuch place lane block 4 flat 1 kitch...	MS_CENTRAL		05/08/2019	0		Estimate	Schedule	Issue	Cancel
CENTRAL	BUCCLEUCH PLACE LANE ACCOM	1559624	ELECTRICAL/EXTRACTOR FAN	3006	*S* Buccleuch place lane block 4 flat 1 room 2...	MS_CENTRAL		05/08/2019	0		Estimate	Schedule	Issue	Cancel
CENTRAL	CHRISTAL MACMILLAN BUILDING	1559615	PLUMBING/TOILETS	112-01-1-206	*URG* CHB - Level 1 - stairwell 2 side- ladies to...	MS_CENTRAL		12/08/2019	0		Estimate	Schedule	Issue	Cancel
CENTRAL	BUCCLEUCH PLACE LANE ACCOM	1559614	JOINERY/WINDOWS	3006	*S* Buccleuch place lane block 5 flat 1 room ...	MS_CENTRAL		19/08/2019	0		Estimate	Schedule	Issue	Cancel
CENTRAL	BUCCLEUCH PLACE LANE ACCOM	1559613	JOINERY/WINDOWS	3006	*S* Buccleuch place lane block 4 flat 2 room 3...	MS_CENTRAL		19/08/2019	0		Estimate	Schedule	Issue	Cancel
CENTRAL	BUCCLEUCH PLACE LANE ACCOM	1559610	JOINERY/BLINDS	3006	*S* Buccleuch place lane block 5 flat 16 room ...	MS_CENTRAL		19/08/2019	0		Estimate	Schedule	Issue	Cancel
CENTRAL	LIBRARY, GEORGE SQ	1559605	JOINERY/DOORS AND LOCKS	224-1-1-L238	*S* 1st Gents Toilet L238, third cubicle door ...	MS_CENTRAL		05/08/2019	0		Estimate	Schedule	Issue	Cancel
CENTRAL	BAYES CENTRE	1559600	JOINERY/FIXTURES & FITTINGS	285	*S* Could I ask to attach bark support in disa...	MS_CENTRAL		19/08/2019	0		Estimate	Schedule	Issue	Cancel
CENTRAL	BUCCLEUCH PLACE LANE ACCOM	1559598	JOINERY/WINDOWS	3006	*S* Buccleuch place lane block 5 flat 16 hallwa...	MS_CENTRAL		05/08/2019	0		Estimate	Schedule	Issue	Cancel
CENTRAL	EDWARD SALVESON HALL	1559596	ELECTRICAL/LIGHTING	861	*S* Edward Salveson room 503, please attend - c...	MS_CENTRAL		05/08/2019	0		Estimate	Schedule	Issue	Cancel

1588 more, view next 50

After selecting the **Schedule (A)** option, the system will display the following **Schedule To Work Request** pop up screen.

Select the **(B) Assign Craftsperson** option.

Schedule Work Request 3863805

Schedule requests to better plan and balance work for teams and craftspersons. You can change the schedule assignments until you issue the request.

▼ Trades

No records to display.

▼ Craftspersons

No records to display.

▼ Tools

No records to display.

Assign Tool

Forward Close

(NOTE: If you select the **Close** option, you will be returned to the **Building Operations Console** screen without taking any action.

The system will display the following **Assign Craftsperson** pop up screen.

Assign Craftsperson

Craftsperson Code*

Date Craftsperson Assigned* 09/08/2016

Time Craftsperson Assigned* 14:52 14:52

Scheduled Hours 0.00

Work Type UnSpecified

Save Cancel

The Date and time will pre-populate to capture when action is taken **(C)**..

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

You can select to assign a craftsperson in 2 different ways:

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

Or

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

Selecting **(E)** 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 **Assign Craftsperson** screen.

(NOTE: Selecting **Close** will return you to the **Assign Craftsperson** screen without copying across any details).

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

When you have the name populated, select the **(F) Save** option, which will close the **Assign Craftsperson** pop up screen.

(**NOTE**, selecting the **Cancel** option will close the **Assign Craftsperson** pop up screen without taking any action and return you to the **Schedule Work Request** pop up screen)

The system will return you to the **Schedule Work Request** pop up screen, which will now display the selected craftsperson and date/time assigned.

Schedule Work Request 1196046

Schedule requests to better plan and balance work for teams and craftspersons. You can change the schedule assignments until you issue the request.

▼ Trades

No records to display.

▼ Craftspersons Assign Craftsperson

Craftsperson	Date Craftsperson Assigned	Time Craftsperson Assigned	Scheduled Hours	Actual Hours	Doubletime Hours	Overtime Hours	Assignment Status	Additional Comments
COLIN PRITCHARD	12/09/2017	13:34	0.00	0.00	0.00	0.00	Active	

▼ Tools Assign Tool

No records to display.

Forward Close **G**

Select the **(G) Close** option to return to the Building Operations Console page.

(**NOTE**: Depending on the job type, you may wish to assign more than one person to the work request.

Repeat the above steps to add further Craftsperson and the display will add each craftsperson).

▼ Craftspersons Assign Craftsperson

erson	Date Craftsperson Assigned	Time Craftsperson Assigned	Scheduled Hours	Actual Hours	Doubletime Hours	Overtime Hours	Assignment Status	Additional Comments
COLIN PRITCHARD	12/09/2017	13:34	0.00	0.00	0.00	0.00	Active	
RY GRAHAM	12/09/2017	13:38	0.00	0.00	0.00	0.00	Active	

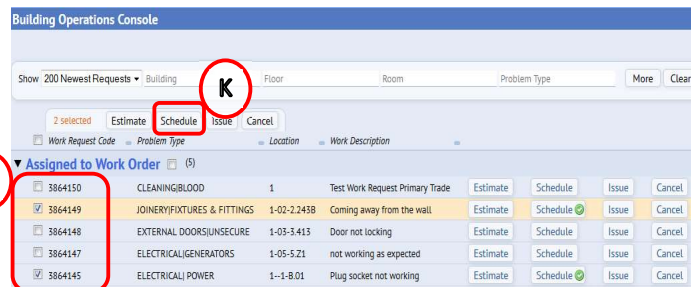
H **I**

(**NOTE**: If you need to remove a craftsperson, select the X option **(H)** to the right of the row, and this will remove their details. If you remove a craftsperson in error, you can simply repeat the steps to assign a craftsperson to re-add them).

(I) Page icon duplicates the entry for the original craftsperson.

The system also allows assigning craftspersons to be applied to a group of work requests.

From the Building Operations Console screen, select the **(J)** **Tick Boxes** next to the work requests that require scheduling.



A **(K)** **Schedule** option will appear at the top of the screen, that will allow you to schedule the selected group.

(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)

The schedule work request pop up screen will appear allowing you to repeat the previous steps to assign a craftsperson.

1.6. Issuing The Work Request To The Craftsperson

Once you have assigned one or more Craftspeople to a work request, the system will display a **(A)** **Green Tick** next to the Scheduled option on the **Building Operations Console screen**.

To issue the Work Request to the assigned Craftsperson, select the **(B)** **Issue** option.

For Maintenance Services, this pushes the request out to the Craftspersons mobile App allowing them to carry out the works assigned.

For all other work teams, the request should only be moved to Issued status when work has progressed to the point where a purchase requisition is required.

▼ Assigned to Work Order (35)					
<input type="checkbox"/>	3863804	PREVENTIVE MAINT	801	10 MIN OFF LOAD RUN CHECK BATTERY MONTHLY ACCO...	Estimate Schedule Issue Cancel 21/07/2016
<input type="checkbox"/>	3863805	PREVENTIVE MAINT	328	CLEAN OUT SURFACE GRATINGS WITHIN THE PLEASANCE...	Estimate A Schedule Issue B Cancel 21/07/2016
<input type="checkbox"/>	3863806	PREVENTIVE MAINT	305	PORTABLE GENERATOR AT INFIRMARY STREET 10 MIN O...	Estimate Schedule Issue Cancel 21/07/2016
<input type="checkbox"/>	3863808	PREVENTIVE MAINT	225	Carry out weekly fire alarm test & fill in ...	Estimate Schedule Issue Cancel 12/07/2016

The system will display the **Issue Work Request** warning screen.

Select the **(C)** **Yes** option to complete the action and submit the work request to the selected Craftsperson.



(**NOTE** - Craftsperson – indicates a team member in any work team tasked with completed the Work Request.)

(**NOTE:** Selecting the **No** option will return you to the **Building Operations Console** screen without taking any action)

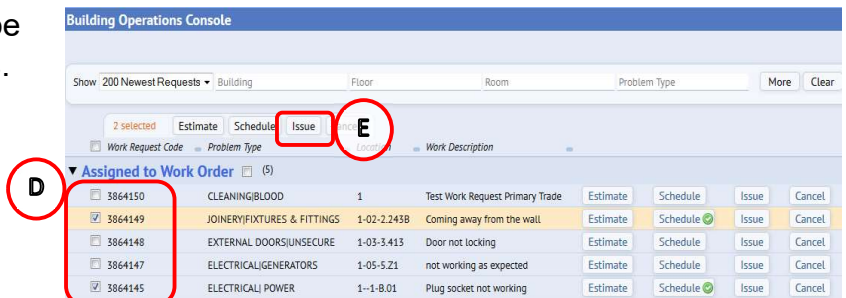
The system also allows issuing to be applied to a group of work requests.

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

An **(E)** **Issue** option will appear at the top of the screen, that will allow you to issue the selected group.

(**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)

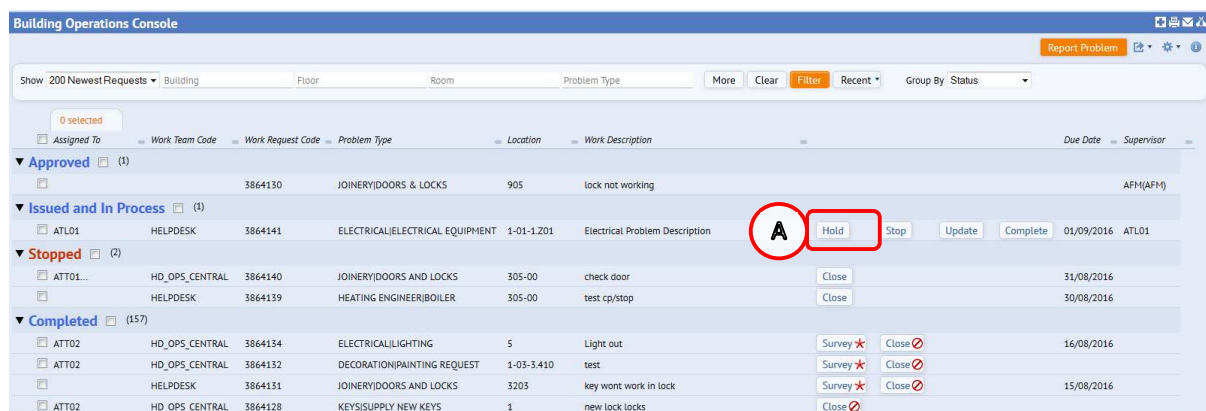
The Work Request will now appear on the assigned Craftsperson's mobile device.



1.7. Placing A Work Request On Hold

If you are unable to complete the Work Request, you can select the **(A)** **Hold** option to place the work on hold. (Note: Comments should be added to explain action **see section 1.3.5 Viewing and Adding Comments**)

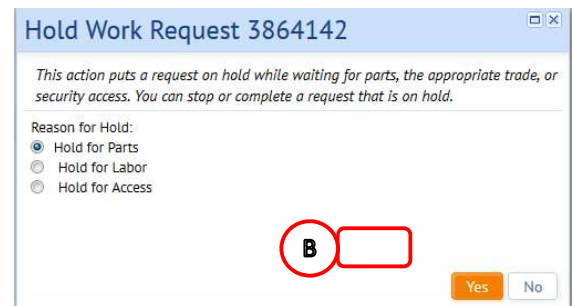
Maintenance Services **MUST** place a request On Hold for Parts before raising a purchase requisition.



The system will display a Hold Work Request pop up screen, with 3 different options.

Select the relevant option and then select the **(B)** Yes option

(NOTE: selecting the **No** option will return you to the Building Operations Console screen without taking any action)



Hold Work Request 3864142

This action puts a request on hold while waiting for parts, the appropriate trade, or security access. You can stop or complete a request that is on hold.

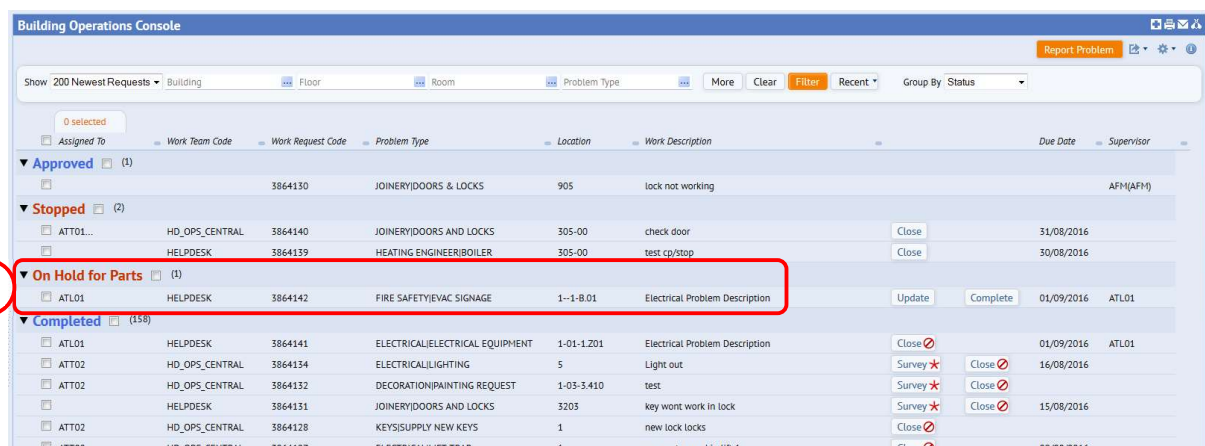
Reason for Hold:

- ☒ Hold for Parts
- ☐ Hold for Labor
- ☐ Hold for Access

B

Yes No

The system will close the Hold Work Request pop up screen and return you to the Building Operations Console screen. The Work Request will have moved from the **Issued And In Process** status section into the relevant **On Hold** section, in this instance to the **(C) On Hold For Parts** status section.



Building Operations Console

Show: 200 Newest Requests | Building | Floor | Room | Problem Type | More | Clear | Filter | Recent | Group By: Status

0 selected

Assigned To	Work Team Code	Work Request Code	Problem Type	Location	Work Description	Due Date	Supervisor
Approved (1)							
		3864130	JOINERY/DOORS & LOCKS	905	lock not working		AFH(AFH)
Stopped (2)							
ATT01...	HD_OPS_CENTRAL	3864140	JOINERY/DOORS AND LOCKS	305-00	check door	31/08/2016	
	HELPLESK	3864139	HEATING ENGINEER/BOILER	305-00	test cp/stop	30/08/2016	
On Hold For Parts (1)							
ATL01	HELPLESK	3864142	FIRE SAFETY/EVAC SIGNAGE	1--1-B.01	Electrical Problem Description	01/09/2016	ATL01
Completed (158)							
ATL01	HELPLESK	3864141	ELECTRICAL/ELECTRICAL EQUIPMENT	1-01-1.201	Electrical Problem Description	01/09/2016	ATL01
ATT02	HD_OPS_CENTRAL	3864134	ELECTRICAL/LIGHTING	5	Light out	16/08/2016	
ATT02	HD_OPS_CENTRAL	3864132	DECORATION/PAINTING REQUEST	1-03-3.410	test		
	HELPLESK	3864131	JOINERY/DOORS AND LOCKS	3203	key wont work in lock	15/08/2016	
ATT02	HD_OPS_CENTRAL	3864128	KEYS/SUPPLY NEW KEYS	1	new lock locks		
ATT03	HD_OPS_CENTRAL	3864127	ELECTRICAL/LIFT TRAP	1	person trapped in lift 1	09/08/2016	

1.8. Resuming A Held Work Request

From the **Building Operations Console** screen, locate the specific work order you wish to resume

Clicking on the Work Request Reference will display the Work Request screen so you can check details of the work request and confirm it is the one you wish to resume.

Select the **(A) Update** option.

Assigned To	Work Team Code	Work Request Code	Problem Type	Location	Work Description	Due Date	Supervisor
Approved (1)							
		3864130	JOINERYDOORS & LOCKS	905	lock not working		AFH(AFH)
Stopped (2)							
ATT01...	HD_OPS_CENTRAL	3864140	JOINERYDOORS AND LOCKS	305-00	check door	31/08/2016	
	HELDESK	3864139	HEATING ENGINEER/BOILER	305-00	test cp/stop	30/08/2016	
On Hold for Parts (1)							
ATL01	HELDESK	3864142	FIRE SAFETY/EVAC SIGNAGE	1--1-B.01	Electrical Problem Description	01/09/2016	ATL01
Completed (159)							
ATL01	HELDESK	3864141	ELECTRICALELECTRICAL EQUIPMENT	1-01-1.201	Electrical Problem Description	01/09/2016	ATL01
ATT02	HD_OPS_CENTRAL	3864134	ELECTRICAL/LIGHTING	5	Light out	16/08/2016	
ATT02	HD_OPS_CENTRAL	3864132	DECORATION/PAINTING REQUEST	1-03-3.410	test		
	HELDESK	3864131	JOINERYDOORS AND LOCKS	3203	key wont work in lock	15/08/2016	
ATT02	HD_OPS_CENTRAL	3864128	KEYS/SUPPLY NEW KEYS	1	new lock locks		
ATT02	HD_OPS_CENTRAL	3864127	ELECTRICAL II IET TRAP	1	person trapped in lift	09/08/2016	

The system will display the **Update Work Request** pop up screen.

Select the triangle to the right of the **(B) More Information** line to expand the section and see more detail.

Update Work Request 3864142

Problem: Work Request Code: 3864142, Problem Type: ELECTRICAL/LIGHTING, Location: 305-00, Description: light out

More Information (B)

- Comments
- History
- Trades
- Parts
- Craftspersons
- Tool Types
- Tools
- Other Costs

Estimated Costs

Estimated Cost of Labour	0.00
Estimated Cost of Parts	0.00
Estimated Cost of Tools	0.00
Estimated Other Costs	0.00
Estimated Total Cost	0.00

Actual Costs

Cost of Labour	0.00
Cost of Parts	0.00
Cost of Other Parts	0.00
Other Costs	0.00
Total Cost	0.00

Update Work Request

Equipment Down (Hours): 0.00, Current Equip. under working: 0.00, Cause Code: , Repair Type: , Craftspersons Note:

Update Request (D)

The **(C) Status** will show the current held option, select the **Issued And In Progress** option.

When you are satisfied with the selected option, select the **(D) Update Request** option.

The system will close the Update Work Request pop up screen, save the amendments and return you to the **Building Operations Console** screen.

(NOTE: If you select the **Close** option, you will be returned to the **Building Operations Console** screen without taking any action).

The work request will have moved from the **On Hold** status section and will now appear under the **Issued And In Progress** status section.

Update Work Request 3864142

Problem: Work Request Code: 3864142, Problem Type: FIRE SAFETY/EVAC SIGNAGE, Location: Black left hand corner of room, Description: Electrical Problem Description

More Information (C)

Service Request Code: 8300, Requested by: KJ0705, Planning: On Hold, Location: 1-1-B.01

Work Order: 3864139, Date Requested: 01/08/2016, Time Requested: 10:04, Subject Area Code: , Equipment Code:

Document 1: , Document 2: , Document 3: , Document 4:

Status dropdown menu:

- On Hold for Parts
- Issued And In Progress (C)
- Completed
- Planned for Contractor
- On Hold for Labour

Update Request (D)

1.9 Completing a Work Request – ATL (For Supervisors skip to Section 2.0)

When the craftsperson has undertaken the required work, they will normally complete the work request through the mobile application, recording their hours, comments, Cause Code and Repair Type.

They will then sync their device to update the Building Operations Console. This step will move the work request from **(A) Issued and in Process** to status step **(B) Complete**

▶ Rejected (0/2) <input type="checkbox"/>						
▶ Requested (0/2) <input type="checkbox"/>						
▶ Assigned to Work Order (0/7) <input type="checkbox"/>						
▼ Issued and In Process (10/10) <input type="checkbox"/>						
FLOWAVE TT BUILDING	1196061	PLUMBING/FLOOD	676-01-1.23	11/09 TEST EM	MS_HOLYROOD	
THOMSONS LAND	1196055	FLOORING/DOOR MATS	555	*T*VERIFICATION TEST	CS_CENTRAL	
HOLYROOD CAMPUS GENERAL	1196053	ELECTRICAL/LIGHTING	550	test of return	HELPDESK	
OLD COLLEGE	1196051	ELECTRICAL/EMERGENCY LIGHTING	1--1-B.65	rerrererer	HELPDESK	
EDWARD SALVESON HALL	1196041	PLUMBING/WATER	861-06	TEST3 EM	MS_HOLYROOD	
ABDEN HOUSE	1196038	ELECTRICAL/ASSIST CONTRACTOR/CON	905	test document	HELPDESK	
ABDEN HOUSE	1196036	ELECTRICAL/DEMO	905	test cf schedule future	HELPDESK	
ABDEN HOUSE	1196035	ELECTRICAL/DEMO	905	test cf	HELPDESK	
ABDEN HOUSE	1196032	ELECTRICAL/ASSIST CONTRACTOR/CON	905	schedule test 1	HELPDESK	
ABDEN HOUSE	1196031	ELECTRICAL/ASSIST CONTRACTOR/CON	905	schedule test	HELPDESK	
▼ Completed (4/4) <input type="checkbox"/>						
CHURCHILL HOUSE	1196059	ELECTRICAL/POWER	801-01	*TEST3* VERIFICATION	CS_CENTRAL	
INFIRMARY ST,09-11	1196058	ELECTRICAL/LIGHTING	305-00	*Test* Verification step 2	CS_CENTRAL	
INFIRMARY ST,09-11	1196048	PLUMBING/WASH BASINS/SINKS	305-00	*URG* Sink overflowing as drain is blocked	MS_POLLOCK	
INFIRMARY ST,09-11	1196042	HEATING ENGINEER/HEATING/VENT	305-00-G.206	lvjn,jkdzl	HELPDESK	

If multiple Craftsperson's are assigned, the request status will only change to Complete once all Craftsperson's have set to complete. However, the individual Craftsperson Assignments status will change for each Craftsperson as they complete their request.

▼ Craftspersons												Add
Craftsperson	Date Craftsperson Assigned	Time Craftsperson Assigned	Scheduled Hours	Actual Hours	Doubletime Hours	Overtime Hours	Date Started	Time Started	Date Finished	Time Finished	Assignment Status	Additional Comments
AFM	12/11/2021	09:59	0.00	0.00	0.00	0.00					Complete	
AGENCY JOINER	12/11/2021	10:00	0.00	0.00	0.00	0.00					Active	

To review/update details of the work request in order to complete on behalf of a craftsperson, access the Work Request pop up screen ([1.3.1](#)).

In the **(C) Craftsperson Section**, the hours and date started can be recorded by selecting the craftsperson entry. This will create pop up screen **Edit Craftsperson** and allow you to update relevant fields (actual hours, date started, and additional comments). You can also add another craftsperson using the **ADD** button.

(NOTE: if there have been multiple Craftspeople added to the Work Request, the hours would be recorded for each. Hours should also be recorded for each day attendance was made)

Work Request

Problem

Work Request Code: 1196059
Description: "TEST3" VERIFICATION
Problem Type: ELECTRICAL/POWER
Problem Location:

More Information
Reference Material
Comments
History
Trades
Parts

Craftspersons

Craftsperson	Date Craftsperson Assigned	Time Craftsperson Assigned	Scheduled Hours	Actual Hours	Doubletime Hours	Overtime Hours	Date Started	Time Started	Date Finished	Time Finished	Assignment Status	Additional Comments
BOBBY LONNIE	11/09/2017	14:52	0.00	1.00	0.00	0.00					Complete	

Tool Types
Tools
Other Costs

Estimated Costs

Estimated Cost of Labour	Estimated Cost of Parts	Estimated Cost of Tools	Estimated Other Costs	Estimated Total Cost
0.00	0.00	0.00	0.00	0.00

Actual Costs

Cost of Labour	Cost of Parts	Cost of Other Parts	Other Costs	Total Cost
23.57	0.00	0.00	0.00	23.57

Update Work Request

Equipment Down (Hours): 0.00
Current Equip. meter reading: 0.00
Craftspersons Notes: Repair completed new part fitted

Cause Code: ELECT_43
Repair Type: NEW INSTALLATION

Update Request Close

Edit Craftsperson

Craftsperson Name: BOBBY LONNIE
Date Craftsperson Assigned: 11/11/2022
Time Craftsperson Assigned: 14:01
Scheduled Hours: 0.00
Actual Hours: 0.00
Doubletime Hours: 0.00
Overtime Hours: 0.00
Date Started:
Time Started:
Date Finished:
Time Finished:
Work Type: UnSpecified
Assignment Status: Active
Additional Comments:

Save Cancel

In the Update Work Request section, the **(D) Cause Code and Repair Type** should be recorded.

You can select the Cause Code and Repair Type in two different ways:

i) Typing directly in the Cause Code or Repair type fields, which will start to provide a drop-down list to select from

Or

Actual Costs	
Cost of Labour	0.00
Cost of Parts	0.00
Cost of Other Parts	0.00
Other Costs	0.00
Total Cost	0.00

Cause Code:

Repair Type:

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

Cause Code

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 **Update Work Request** pop up screen.

Select Value - Cause Code

Cause Type Code	Cause Type Description
ELECT_40	GENERAL - A FAILURE RELATED TO SOME MECHANICAL ...
ELECT_41	SHORT CIRCUITING - SHORT CIRCUIT.
ELECT_42	OPEN CIRCUIT - DISCONNECTION, INTERRUPTION, BRO...
ELECT_43	NO POWER/VOLTAGE - MISSING OR INSUFFICIENT ELEC...
ELECT_44	FAULTY POWER/VOLTAGE - EARTH FAULT, LOW ELECTR...
ELECT_45	EARTH/ISOLATION FAULT - EARTH FAULT, LOW ELECTR...
ELECT_46	LIGHTING - FAILURE OF A LAMP OR TUBE DUE TO AGE...

Close

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

When adding Stock Items to a Work Request through the Building Operations Console the Part Code needs to be selected through the look up rather than typing directly in. To add a new stock item select **ADD** from the **(E) Parts Section**

More Information
Reference Material
Comments
History
Trades
Parts
Craftspersons
Tool Types
Tools
Other Costs

Estimated Costs

Estimated Cost of	Actual Cost
Labour	0.00
Parts	0.00
Tools	0.00
Other Costs	0.00
Total Cost	0.00

Add Part

Part Code*

Quantity Estimated 0.000

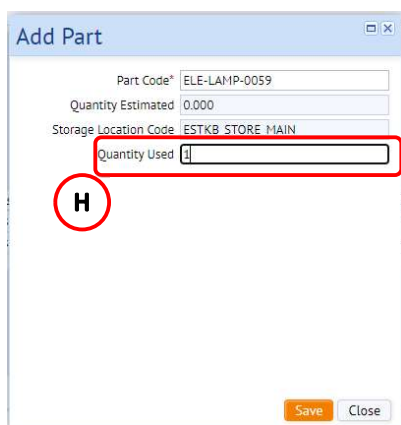
Storage Location Code MAIN

Quantity Used 0.000

From Add Part pop up screen, click on List of Values against **(F) Part Code** . This will then open up the table to Find Parts.

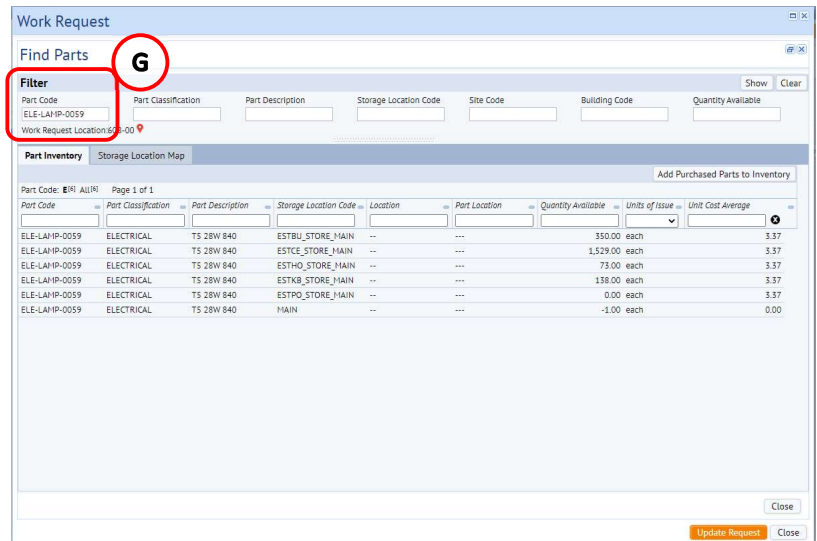
In **(G) Part Code** field type in the stock item you wish to add to Work Request and click on Show

This will bring back all Storage Locations for that Part Code. Select the Storage Location you require



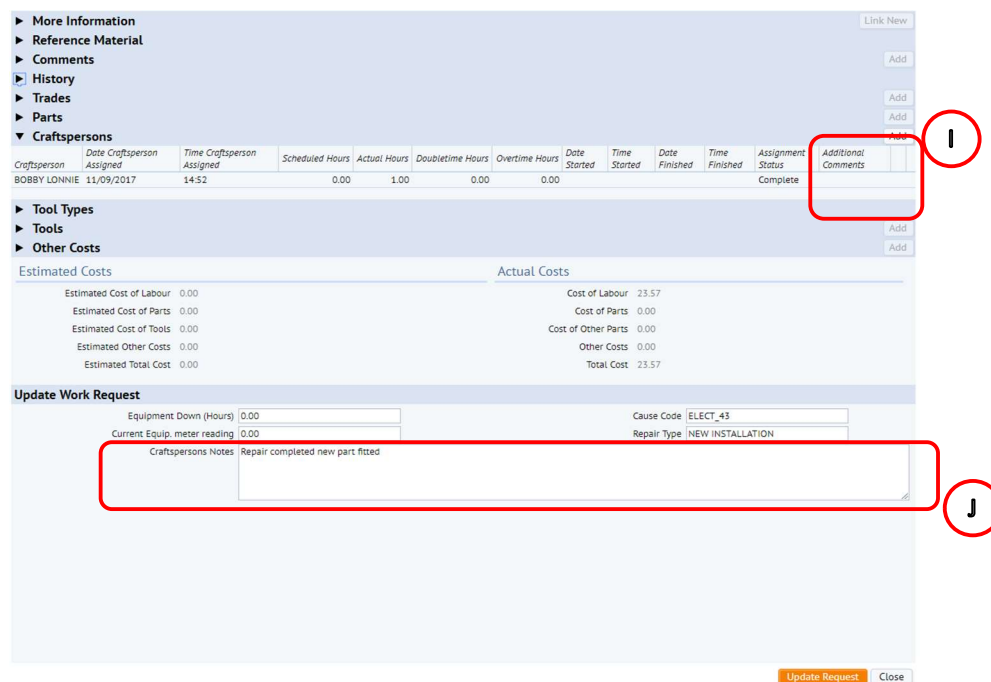
The 'Add Part' pop-up screen shows the following fields: Part Code* (ELE-LAMP-0059), Quantity Estimated (0.000), Storage Location Code (ESTKB_STORE_MAIN), and Quantity Used (1). The 'Quantity Used' field is highlighted with a red box and labeled with a circled 'H'. At the bottom are 'Save' and 'Close' buttons.

Input **(H) Quantity Used** and then Save. This will assign this Part Code for required Storage Location Code to your Work Request



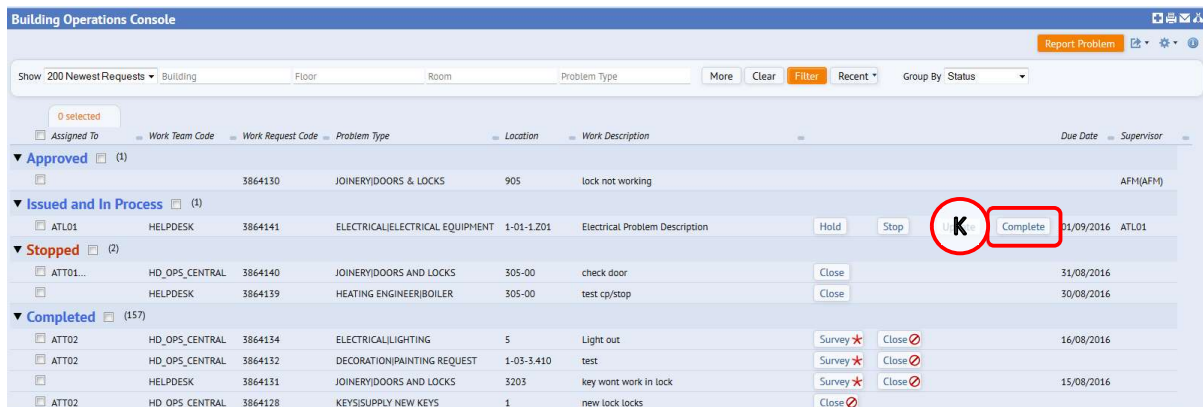
The 'Work Request Find Parts' screen shows a filter section with 'Part Code' set to 'ELE-LAMP-0059' and 'Work Request Location' set to '0000'. Below this is a table of storage locations for the selected part code. The table has columns: Part Code, Part Classification, Part Description, Storage Location Code, Location, Part Location, Quantity Available, Units of Issue, and Unit Cost Average. The table lists several storage locations for 'ELE-LAMP-0059' under the 'ELECTRICAL' classification. The 'Part Code' field in the filter is highlighted with a red box and labeled with a circled 'G'. At the bottom right are 'Update Request' and 'Close' buttons.

Comments left by the Craftsperson will appear either in the **(J) Craftsperson notes**, or under Craftsperson Section in the **(I) Additional Comments** field.



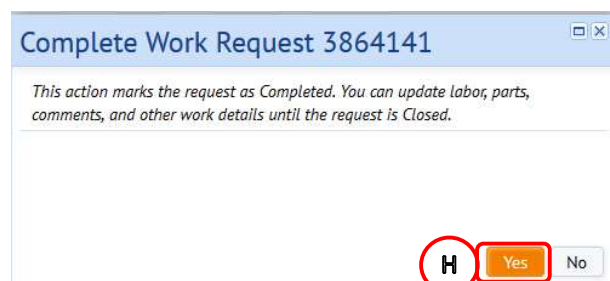
The main 'Work Request' screen displays various sections: More Information, Reference Material, Comments, History, Trades, Parts, and Craftspersons. The 'Craftspersons' section shows a table with columns: Craftsperson, Date Assigned, Time Assigned, Scheduled Hours, Actual Hours, Doubletime Hours, Overtime Hours, Date Started, Time Started, Date Finished, Time Finished, Assignment Status, and Additional Comments. The 'Additional Comments' column is highlighted with a red box and labeled with a circled 'I'. Below this is the 'Tool Types' section, followed by 'Estimated Costs' and 'Actual Costs' tables. The 'Update Work Request' section at the bottom includes fields for Equipment Down (Hours), Current Equip. meter reading, Cause Code, and Repair Type. The 'Craftspersons Notes' field is highlighted with a red box and labeled with a circled 'J'. At the bottom right are 'Update Request' and 'Close' buttons.

When you are back at the Building Operations Console, locate the respective work order you have been updating and select the **(K) Complete** option.



Assigned To	Work Team Code	Work Request Code	Problem Type	Location	Work Description	Due Date	Supervisor
Approved (1)							
		3864130	JOINERY(DOORS & LOCKS	905	lock not working		AFM(AFM)
Issued and In Process (4)							
ATL01	HELPDESK	3864141	ELECTRICAL(ELECTRICAL EQUIPMENT	1-01-1.201	Electrical Problem Description		ATL01
					Hold	Stop	
Stopped (2)							
ATT01...	HD_OPS_CENTRAL	3864140	JOINERY(DOORS AND LOCKS	305-00	check door		31/08/2016
					Close		
	HELPDESK	3864139	HEATING ENGINEER(BOILER	305-00	test cp/stop		30/08/2016
					Close		
Completed (157)							
ATT02	HD_OPS_CENTRAL	3864134	ELECTRICAL(LIGHTING	5	Light out	Survey★	16/08/2016
					Close		
ATT02	HD_OPS_CENTRAL	3864132	DECORATION(PAINTING REQUEST	1-03-3.410	test	Survey★	
					Close		
	HELPDESK	3864131	JOINERY(DOORS AND LOCKS	3203	key wont work in lock	Survey★	15/08/2016
					Close		
ATT02	HD_OPS_CENTRAL	3864128	KEYS(SUPPLY NEW KEYS	1	new lock locks	Close	

The system will display a warning pop up screen, select the **(H) Yes** option.



Complete Work Request 3864141

This action marks the request as Completed. You can update labor, parts, comments, and other work details until the request is Closed.

H Yes No

(NOTE: Selecting **No** will return you to the **Building Operations Console** screen without taking any action).

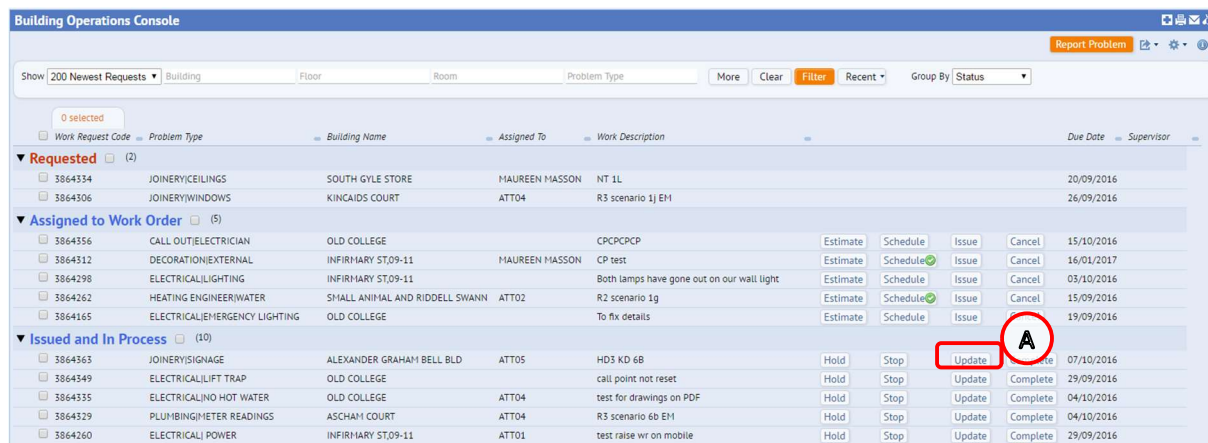
The system will complete the Work Request and move it from the **Issued And In Process** status to the **(I) Completed** status section on the Building Operations Console screen pending **Verification**.

1.10 Completing a Work Request – Supervisor

From the **Building Operations Console** screen, locate the specific work request you wish to complete.

(**NOTE:** clicking on the Work Request code will display the **Work Request** pop up screen so you can check details of the work request and confirm it is the one you wish to complete).

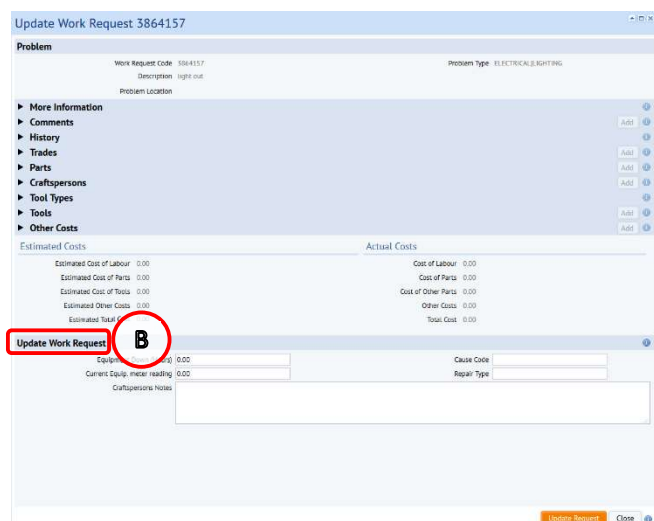
Select the **(A) Update** option.



Work Request Code	Problem Type	Building Name	Assigned To	Work Description	Due Date	Supervisor
Requested (2)						
3864334	JOINERY/CEILINGS	SOUTH GYLE STORE	MAUREEN HASSON	NT 1L	20/09/2016	
3864306	JOINERY/WINDOWS	KINCAIDS COURT	ATT04	R3 scenario 1J EM	26/09/2016	
Assigned to Work Order (5)						
3864356	CALL OUT/ELECTRICIAN	OLD COLLEGE		CPCPCPCP	Estimate	Schedule
3864312	DECORATION/EXTERNAL	INFIRMARY ST,09-11	MAUREEN HASSON	CP test	Estimate	Schedule
3864298	ELECTRICAL/LIGHTING	INFIRMARY ST,09-11		Both lamps have gone out on our wall light	Estimate	Schedule
3864262	HEATING ENGINEER/WATER	SMALL ANIMAL AND RIDDELL SWANN	ATT02	R2 scenario 1g	Estimate	Schedule
3864165	ELECTRICAL/EMERGENCY LIGHTING	OLD COLLEGE		To fix details	Estimate	Schedule
Issued and In Process (10)						
3864363	JOINERY/SIGNAGE	ALEXANDER GRAHAM BELL BLD	ATT05	HD3 KD 6B	Hold	Stop
3864349	ELECTRICAL/LIFT TRAP	OLD COLLEGE		call point not reset	Hold	Stop
3864335	ELECTRICAL/NO HOT WATER	OLD COLLEGE	ATT04	test for drawings on PDF	Hold	Stop
3864329	PLUMBING/METER READINGS	ASCHAM COURT	ATT04	R3 scenario 6B EM	Hold	Stop
3864260	ELECTRICAL/POWER	INFIRMARY ST,09-11	ATT01	test raise wr on mobile	Hold	Stop

The system will display the **Update Work Request** pop up screen.

The details you will need to update can be located in the **(B) Update Work Request** section.



Update Work Request 3864157

Problem

Work Request Code: 3864157
 Description: light out
 Problem Location:

More Information

- Comments
- History
- Trades
- Parts
- Craftspersons
- Tool Types
- Tools
- Other Costs

Estimated Costs

Estimated Cost of Labour: 0.00	Estimated Cost of Parts: 0.00	Estimated Cost of Tools: 0.00	Estimated Other Costs: 0.00	Estimated Total Cost: 0.00
--------------------------------	-------------------------------	-------------------------------	-----------------------------	----------------------------

Actual Costs

Cost of Labour: 0.00	Cost of Parts: 0.00	Cost of Other Parts: 0.00	Other Costs: 0.00	Total Cost: 0.00
----------------------	---------------------	---------------------------	-------------------	------------------

Update Work Request (B)

Equipment: (0.00)
 Current Equip. meter reading: 0.00
 Cause Code:
 Repair Type:
 Craftspersons Notes:

Update Request **Close**

You will need to record the **(C) Cause Code** and **Repair Type** information.

You can select the Cause Code and Repair Type in two different ways:

Update Work Request 3864141

Problem

Work Request Code: 3864141 Problem Type: ELECTRICAL/ELECTRICAL EQUIPMENT

Description: Electrical Problem Description

Problem Location: A TRS1 2

More Information

- Comments
- History
- Trades
- Parts
- Craftspersons
- Tool Types
- Tools
- Other Costs

Estimated Costs

Estimated Cost of Labour	0.00
Estimated Cost of Parts	0.00
Estimated Cost of Tools	0.00
Estimated Other Costs	0.00
Estimated Total Cost	0.00

Actual Costs

Cost of Labour	0.00
Cost of Parts	0.00
Cost of Other Parts	0.00
Other Costs	0.00
Total Cost	0.00

Update Work Request

Equipment Down (Hours): 0.00

Current Equip. meter reading: 0.00

Craftspersons Notes:

Cause Code

Repair Type

Update Request Close

i) Typing directly in the Cause Code or Repair type fields, which will start to provide a drop down list to select from

Or

Actual Costs

Cost of Labour	0.00	ELECT_40
Cost of Parts	0.00	ELECT_41
Cost of Other Parts	0.00	ELECT_42
Other Costs	0.00	ELECT_43
Total Cost	0.00	ELECT_44
		ELECT_45
		ELECT_46

Cause Code

Repair Type

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

Cause Code

(D) 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 **Update Work Request** pop up screen.

Select Value - Cause Code

Cause Type Code: ELE All(7)

Cause Type Code	Cause Type Description
ELECT_40	GENERAL - A FAILURE RELATED TO SOME MECHANICAL ...
ELECT_41	SHORT CIRCUITING - SHORT CIRCUIT.
ELECT_42	OPEN CIRCUIT - DISCONNECTION, INTERRUPTION, BRO...
ELECT_43	NO POWER/VOLTAGE - MISSING OR INSUFFICIENT ELEC...
ELECT_44	FAULTY POWER/VOLTAGE - EARTH FAULT, LOW ELECTR...
ELECT_45	EARTH/ISOLATION FAULT - EARTH FAULT, LOW ELECTR...
ELECT_46	LIGHTING - FAILURE OF A LAMP OR TUBE DUE TO AGE...

Close

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

Add **(E) Comments** confirming the outcome of the Work Request and select the **(F) Update Request** option

Update Work Request 3864141

Problem

Work Request Code: 3864141 Problem Type: ELECTRICAL/ELECTRICAL EQUIPMENT

Description: Electrical Problem Description Problem Location: A TRIST 2

More Information

- Comments** (E)
- History
- Trades
- Parts
- Craftspersons
- Tool Types
- Tools
- Other Costs

Estimated Costs

Estimated Cost of Labour: 0.00	Estimated Cost of Parts: 0.00	Estimated Cost of Tools: 0.00	Estimated Other Costs: 0.00	Estimated Total Cost: 0.00
--------------------------------	-------------------------------	-------------------------------	-----------------------------	----------------------------

Actual Costs

Cost of Labour: 0.00	Cost of Parts: 0.00	Cost of Other Parts: 0.00	Other Costs: 0.00	Total Cost: 0.00
----------------------	---------------------	---------------------------	-------------------	------------------

Update Work Request

Equipment Down (hours): 0.00 Cause Code:

Current Equip. meter reading: 0.00 Repair Type:

Craftspersons Notes:

Update Request (F)

This will save the details you have entered, close the pop-up screen and return you to the **Building Operations Console** screen.

When you are back at the Building Operations Console, locate the respective work order you have been updating and select the **(G) Complete** option.

Building Operations Console

Show: 200 Newest Requests Building Floor Room Problem Type More Clear Filter Recent Group By: Status

0 selected

Assigned To	Work Team Code	Work Request Code	Problem Type	Location	Work Description	Due Date	Supervisor
Approved (1)							
		3864130	JOINERY/DOORS & LOCKS	905	lock not working		AFH(AFH)
Issued and In Process (1)							
ATL01	HELPLESK	3864141	ELECTRICAL/ELECTRICAL EQUIPMENT	1-01-1.201	Electrical Problem Description	31/09/2016	ATL01
Stopped (2)							
ATT01...	HD_OPS_CENTRAL	3864140	JOINERY/DOORS AND LOCKS	305-00	check door	31/08/2016	
	HELPLESK	3864139	HEATING ENGINEER/BOILER	305-00	test cp/stop	30/08/2016	
Completed (157)							
ATT02	HD_OPS_CENTRAL	3864134	ELECTRICAL/LIGHTING	5	Light out	16/08/2016	
ATT02	HD_OPS_CENTRAL	3864132	DECORATION/PAINTING REQUEST	1-03-3.410	test		
	HELPLESK	3864131	JOINERY/DOORS AND LOCKS	3203	key wont work in lock	15/08/2016	
	HD_OPS_CENTRAL	3864128	KEYS/SUPPLY NEW KEYS	1	new lock locks		

The system will display a warning pop up screen, select the **(H) Yes** option.

Complete Work Request 3864141

This action marks the request as Completed. You can update labor, parts, comments, and other work details until the request is Closed.

H Yes No

(NOTE: Selecting **No** will return you to the **Building Operations Console** screen without taking any action).

The system will complete the Work Request and move it from the **Issued And In Process** status to the **(I) Completed** status section on the Building Operations Console screen pending **Verification**.

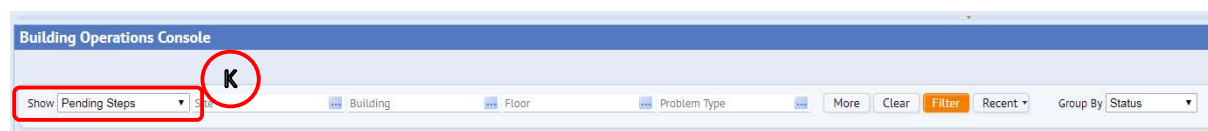


Requested (0/2)							
Assigned to Work Order (0/10)							
Issued and In Process (0/162)							
Completed (24/24)							
INFIRMARY ST.09-11	1196064	ELECTRICAL/LIGHTING	Light is out	HELPOESK	COLIN PRITCHARD	04/10/2017	Verify
CHURCHILL HOUSE	1196059	ELECTRICAL/POWER	*TEST3* VERIFICATION	CS Central	BOBBY LONNIE	18/09/2017	
INFIRMARY ST.09-11	1196058	ELECTRICAL/LIGHTING	*Test* Verification step 2	CS Central	BOBBY LONNIE	18/09/2017	
INFIRMARY ST.09-11	1196048	PLUMBING/WASH BASINS/SINKS	*URG* Sink overflowing as drain is blocked	MS POLLOCK	BOBBY LONNIE	21/09/2017	
ALCOHOL AND CONSUMABLES STORES	1196030	ELECTRICAL/ELECTRIC CAR CHARGES	test parts	HELPOESK		21/09/2017	
OLD COLLEGE	1196029	ELECTRICAL/ASSIST CONTRACTOR/CON	test afm	HELPOESK		21/09/2017	
ABDEN HOUSE	1196025	ELECTRICAL/ASSIST CONTRACTOR/CON	test parts	HELPOESK		20/09/2017	
VET SCHOOL	1196024	PEST CONTROL/ANTS	link wr	HELPOESK	AFM	01/09/2017	
ABDEN HOUSE	1196021	ELECTRICAL/ELECTRIC CAR CHARGES	test parts	HELPOESK		11/09/2017	
INFIRMARY ST.09-11	1196020	ELECTRICAL/GENERATORS	test	HELPOESK		04/09/2017	
HALLS OF RES GENERAL	1196014	PREVENTIVE MAINT		MS POLLOCK		29/06/2017	
EASTER BUSH VET CTRE	1196011	PREVENTIVE MAINT		MS BIOQ_EBUSH		29/06/2017	
SOUTH CLERK ST.38	1196009	PREVENTIVE MAINT		MS POLLOCK		26/06/2017	

1.11 Verifying a WR

When satisfied the Work Request has been completed with the correct information recorded, you need to filter to show **(K) Pending Steps** and complete **(L) Verify** step.

If the work request has a purchase order attached to it, **do not** complete the **Verify** step until the final invoice has been uploaded to P&M and Receipted.



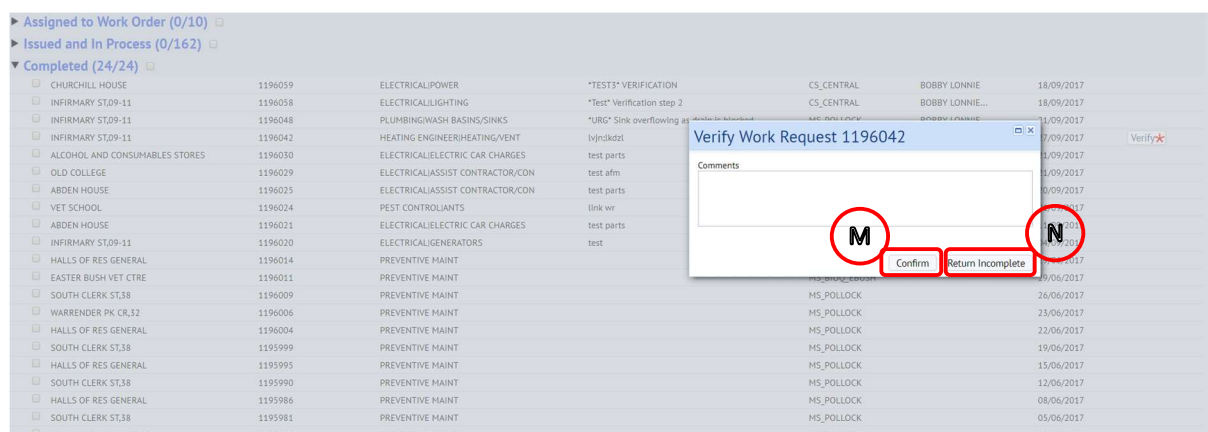
Building Operations Console

Show Pending Steps (K) Building Floor Problem Type More Clear Filter Recent Group By Status



Assigned to Work Order (0/10)							
Issued and In Process (0/162)							
Completed (24/24)							
CHURCHILL HOUSE	1196059	ELECTRICAL/POWER	*TEST3* VERIFICATION	CS Central	BOBBY LONNIE	18/09/2017	Verify
INFIRMARY ST.09-11	1196058	ELECTRICAL/LIGHTING	*Test* Verification step 2	CS Central	BOBBY LONNIE	18/09/2017	
INFIRMARY ST.09-11	1196048	PLUMBING/WASH BASINS/SINKS	*URG* Sink overflowing as drain is blocked	MS POLLOCK	BOBBY LONNIE	21/09/2017	
INFIRMARY ST.09-11	1196042	HEATING ENGINEER/HEATING/VENT	lvjnkdzt	HELPOESK	COLIN PRITCHARD	27/09/2017	
ALCOHOL AND CONSUMABLES STORES	1196030	ELECTRICAL/ELECTRIC CAR CHARGES	test parts	HELPOESK		21/09/2017	
OLD COLLEGE	1196029	ELECTRICAL/ASSIST CONTRACTOR/CON	test afm	HELPOESK		21/09/2017	
ABDEN HOUSE	1196025	ELECTRICAL/ASSIST CONTRACTOR/CON	test parts	HELPOESK		20/09/2017	
VET SCHOOL	1196024	PEST CONTROL/ANTS	link wr	HELPOESK	AFM	01/09/2017	
ABDEN HOUSE	1196021	ELECTRICAL/ELECTRIC CAR CHARGES	test parts	HELPOESK		11/09/2017	
INFIRMARY ST.09-11	1196020	ELECTRICAL/GENERATORS	test	HELPOESK		04/09/2017	
HALLS OF RES GENERAL	1196014	PREVENTIVE MAINT		MS POLLOCK		29/06/2017	
EASTER BUSH VET CTRE	1196011	PREVENTIVE MAINT		MS BIOQ_EBUSH		29/06/2017	

Select **(L) Verify** button and the **Verify Work Request** pop up screen displays.



Building Operations Console

Assigned to Work Order (0/10)

Issued and In Process (0/162)

Completed (24/24)

Verify Work Request 1196042

Comments

Confirm (M) Return Incomplete (N)

Add any comments, then to complete the verification step select **(M) Confirm**.

If the information is incomplete or the job has not been finished you can reject the verification step and return the work request to the Craftsperson select **(N) Return Incomplete**. This will change work request status to Issued you should then confirm the Craftperson assignment status is active

(NOTE: If there is no purchase order linked to the work request the Verify step can be completed immediately.)

1.12 Cancelling a WR

In some circumstances, it may be necessary to cancel a WR, e.g. no longer required or discovered to be duplicate. This can be done at the Assigned to Work Order status only, if the request has already been issued but not yet attended, (therefore no costs associated) then the WR can be returned to the Assigned status in order to cancel, see (1.3.2). Viewing More Information & Returning Work Request.

Building Operations Console

Report Problem

Show All

Site

Building

Floor

Problem Type

More

Clear

Filter

Recent

Group By

Status

0 selected

Site

Building Name

Work Request Code

Problem Type

Location

Work Description

Work Team Code

Assigned To

Due Date

No. of

Repair Type

Assigned to Work Order (14/1702)

CENTRAL

MEDICAL SCHOOL, TEVIOT

1559641

ELECTRICAL/AUTOMATIC DOORS

113

*URG Main doors to doorway 4. People are unabh...

MS_CENTRAL

12/08/2019

0

Estimate

Schedule

Issue

Cancel

CENTRAL

BRISTOL PLACE 19

1559633

JOINERY/SHELVING/NOTICE BOARDS

3004-01

S 19/2 Bristol Square - Pin board in bedroom 1...

MS_CENTRAL

05/08/2019

0

Estimate

Schedule

Issue

Cancel

CENTRAL

MEDICAL SCHOOL, TEVIOT

1559628

ELECTRICAL/LIGHTING

113-01

S Downway 4 - Light out on main stairwell (L...

MS_CENTRAL

19/08/2019

0

Estimate

Schedule

Issue

Cancel

CENTRAL

BUCCLEUCH PLACE LANE ACCOM

1559627

JOINERY/WINDOWS

3006

S Buccleuch place lane block 5 flat 5 kitchen...

MS_CENTRAL

05/08/2019

0

Estimate

Schedule

Issue

Cancel

CENTRAL

BUCCLEUCH PLACE LANE ACCOM

1559626

JOINERY/WINDOWS

3006

S Buccleuch place lane block 4 flat 1 kitchen...

MS_CENTRAL

05/08/2019

0

Estimate

Schedule

Issue

Cancel

CENTRAL

BUCCLEUCH PLACE LANE ACCOM

1559624

ELECTRICAL/EXTRACTOR FAN

3006

S Buccleuch place lane block 4 flat 1 room 2...

MS_CENTRAL

05/08/2019

0

Estimate

Schedule

Issue

Cancel

CENTRAL

CHRISTAL MACMILLAN BUILDING

1559615

PLUMBING/TOILETS

112-01-1.206

*URG CMB - level 1 - stairwell 2 side- ladies to...

MS_CENTRAL

12/08/2019

0

Estimate

Schedule

Issue

Cancel

CENTRAL

BUCCLEUCH PLACE LANE ACCOM

1559614

JOINERY/WINDOWS

3006

S Buccleuch place lane block 5 flat 1 room 3...

MS_CENTRAL

19/08/2019

0

Estimate

Schedule

Issue

Cancel

CENTRAL

BUCCLEUCH PLACE LANE ACCOM

1559613

JOINERY/WINDOWS

3006

S Buccleuch place lane block 5 flat 2 room 3...

MS_CENTRAL

19/08/2019

0

Estimate

Schedule

Issue

Cancel

CENTRAL

BUCCLEUCH PLACE LANE ACCOM

1559610

JOINERY/BLINDS

3006

S Buccleuch place lane block 5 flat 16 room ...

MS_CENTRAL

19/08/2019

0

Estimate

Schedule

Issue

Cancel

CENTRAL

LIBRARY, GEORGE SQ

1559605

JOINERY/DOORS AND LOCKS

224-1-L238

S 1st Gents Toilet L238, third cubicle door ...

MS_CENTRAL

05/08/2019

0

Estimate

Schedule

Issue

Cancel

CENTRAL

BAYES CENTRE

1559600

JOINERY/FIXTURES & FITTINGS

285

S Could I ask to attach back support in disa...

MS_CENTRAL

19/08/2019

0

Estimate

Schedule

Issue

Cancel

CENTRAL

BUCCLEUCH PLACE LANE ACCOM

1559598

JOINERY/WINDOWS

3006

S Buccleuch place lane block 5 flat 16 hallwa...

MS_CENTRAL

05/08/2019

0

Estimate

Schedule

Issue

Cancel

CENTRAL

EDWARD SALVENSEN HALL

1559596

ELECTRICAL/LIGHTING

801

S Edward Salvensen room 503, please attend - c...

MS_CENTRAL

05/08/2019

0

Estimate

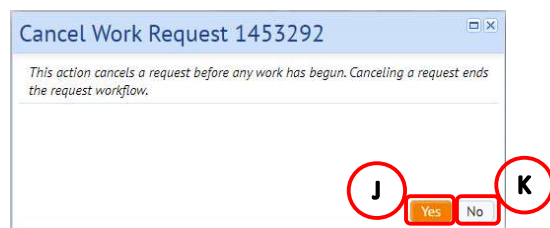
Schedule

Issue

Cancel

1668 more work orders

Once the WR is at Assigned Status clicking on **(I) CANCEL** will present the Cancel Work Request pop up screen. This is asking for confirmation that you wish to cancel the request. Selecting **(J) Yes** will cancel the request and immediately archives it.



NOTE: Selecting **(K) No** will return you to the Building Operations Console with no changes made.

1.12.1 Cancelling Preventative Maintenance Work Requests

PPM Work Requests which are currently at Issued/Assigned to Work Order Status can now be cancelled by Area Team Leader/Maintenance Planner/Foreman. In order to cancel Work Requests users will require to login to WebCentral **CAD** url using the Generic User details supplied to their area. URL to be used should be:-

<https://www.webcentralcad.estates.ed.ac.uk/archibus>

For Work Requests which are at Assigned to Work Order the following process should be followed:-

1. Work Request requires to be Issued (in order that the Cause Code is available for selection)
2. In Comments box enter reason for cancellation
3. Select Cause Code for reason WR has been Cancelled – see below for list of Cause Codes
4. Cancel Work Request

Work Requests at Issued which have to be cancelled require to be checked to see if there are any Craftspersons assigned to them.

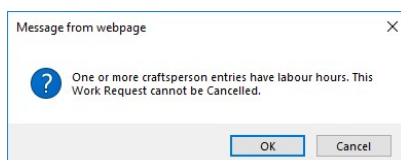
For Work Requests which do not have Craftsperson assigned these can be cancelled as follows:-

1. In Comments box enter reason for cancellation
2. Select Cause Code for reason WR has been Cancelled – see below for list of Cause Codes
3. Cancel Work Request

For Work Requests which have Craftsperson assigned but no time logged the following process should be followed:-

1. Craftsperson should be removed from Work Request
2. Craftsperson should then be informed to sync their mobiles to remove this Work Request from their list of WRs
3. In Comments box enter reason for cancellation
4. Select Cause Code for reason WR has been Cancelled – see below for list of Cause Codes
5. Cancel Work Request

For Work Requests, which have, Craftsperson assigned and Craftsperson has logged time the Work Request cannot be cancelled. The following message will appear if the Cancel button is selected and the Work Request cannot be Cancelled:-



Cause Type Code	Cause Type Description
COVID19 SHUTDOWN	COVID19 SHUTDOWN
CX PPM-ACCESS	CANCELLED PPM - ACCESS
CX PPM-DUPLICATE	CANCELLED PPM - DUPLICATE
CX PPM-H&S	CANCELLED PPM - HEALTH AND SAFETY
CX PPM-RESOURCE	CANCELLED PPM - RESOURCE

Please note this process should only be followed for Preventive Maint Work Requests and not for Reactive Work Requests

Reactive Work Requests should not be cancelled after being issued.

APPENDIX A

2.1 Using filter & amending columns - Building Operation Console Screen

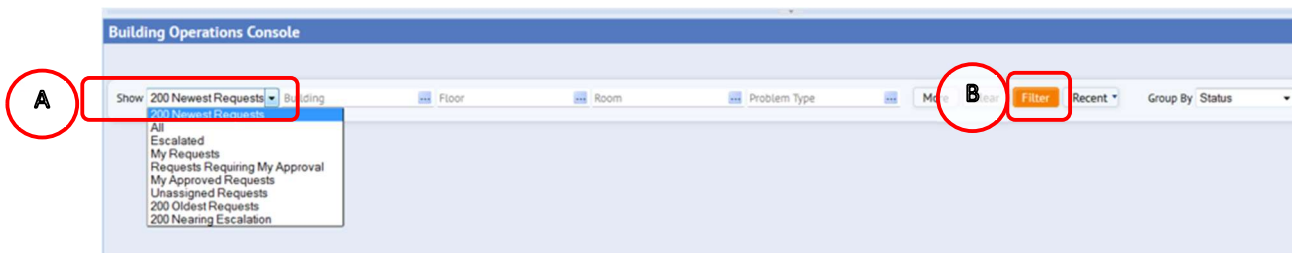
2.1.1 Using Filters

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, these help to bring back relevant information and allows the system to perform quickly.

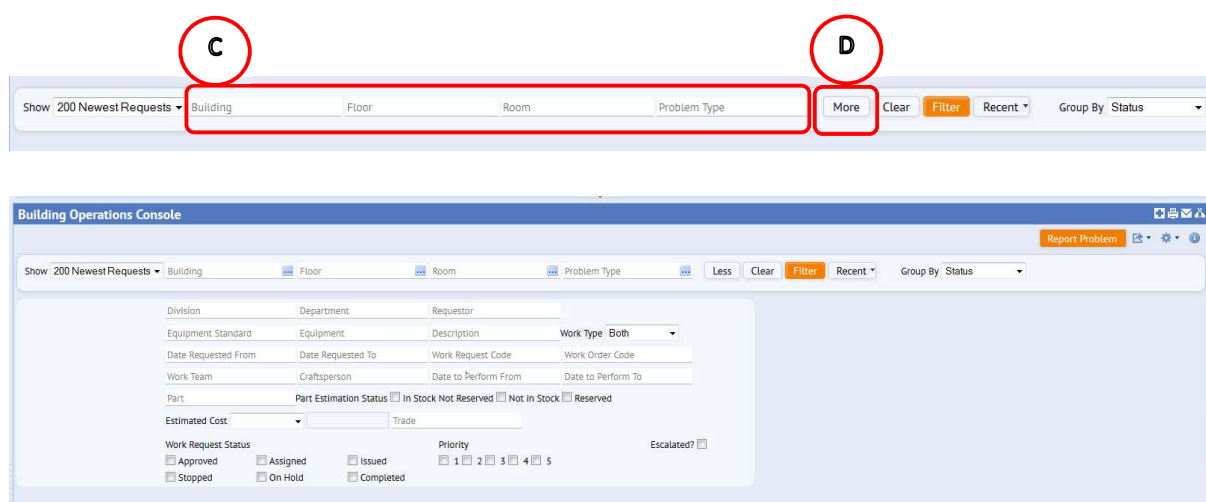
The **(A) Show** option will provide a drop-down list of generic searches, such as by status or Work Request age.

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



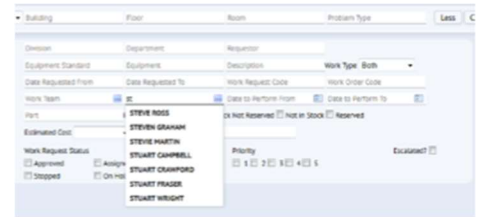
There are a range of filters by **(C) Location & Work Type**

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



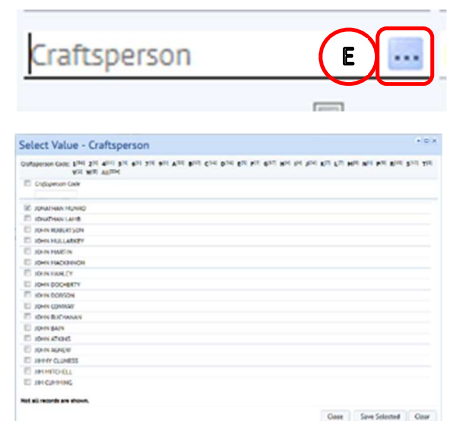
You can select information for the different fields in two different ways:

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 one 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**

Equipment Code	Equipment Standard
NCMONITOR1	MONITOR
NCMONITOR2	MONITOR
NCOHP1	OHP

2.1.2 Sorting Column & fields

You can also sort information to arrange information to display by field, for example, sort work requests by their due date or works currently assigned to Craftsperson

To sort click on the small box next to the subject column you wish to sort by for example Craftsperson, select the box **(A)** to the Right of the **Assigned To** column

Building Operations Console

Show: All Site Building Floor Problem Type More Clear Filter Recent Group By Status

0 selected

Assigned to Work Order (0/47)

Issued and In Process (51/262)

Site	Building Name	Work Request Code	Problem Type	Location	Work Description	Work Item Code	Assigned To	Due	Work Requested	Due Date	No. of	Repair Type
CENTRAL	BRISTOL PLACE,19	1360385	JOINERYWINDOWS	3004-02	*URG* 19/8 Bristol Place The window in the kit...	MS_CENTRAL	DOUGIE RODGERS	02/08/2019	16/08/2019	1		Hold Update Complete
CENTRAL	WIGH IGHM WEST & CENTRE BLDGS (HGU)	1360382	ELECTRICALLIGHTING	2302-00-GC19	*URG* Lights are not working in Yamauna fish room.	MS_CENTRAL	DAVID ROCHES	02/08/2019	16/08/2019	1		Hold Update Complete
CENTRAL	LIBRARY, GEORGE SQ	1360375	JOINERYDOORS AND LOCKS	224-00-GZ14	*URG* GZ14 Accessible Toilet Door Lock in the ...	MS_CENTRAL	WILLIAM POTTINGE	02/08/2019	16/08/2019	1		Hold Update Complete
CENTRAL	ALISON HOUSE	1360337	ELECTRICPOWER	110-01-1.01	*URG* Alison House - Room 1.01 - Student plugge...	MS_CENTRAL	NEIL WATSON	02/08/2019	16/08/2019	1		Hold Update Complete
CENTRAL	APPLETON TOWER	1360329	PLUMBINGINVESTIGATE SMELL	202-00	*S* W geyr sewage smell coming fro a cupboard...	MS_CENTRAL	JAKE MASON	02/08/2019	09/08/2019	1		Hold Update Complete
CENTRAL	APPLETON TOWER	1360327	JOINERYDOORS AND LOCKS	202-1-8.204	*URG* DOORMA REQUIRED - HECHANISM ON DOOR CLOSER...	MS_CENTRAL	DOUGIE RODGERS...	02/08/2019	16/08/2019	2	MISCELLANEOUS	Hold Update Complete
CENTRAL	ALISON HOUSE	1360324	ELECTRICALLIGHTING	110-1-8.01	*S* Corridor in basement outside room 8.01 5 li...	MS_CENTRAL	GORDON MCDUGALD	02/08/2019	09/08/2019	1		Hold Update Complete
CENTRAL	BAYES CENTRE	1360322	ELECTRICALLIGHTING	285-1-8.206	*S* Cleaners cupboard in basement 8.206 light o...	MS_CENTRAL	BILLY THOMPSON	02/08/2019	09/08/2019	1		Hold Update Complete
CENTRAL	INFORMATICS	1360316	PLUMBINGTAPS	282-01-1.35	*U15* It has been reported that the tap in 1.35...	MS_CENTRAL	GRAHAM SIMPSON	02/08/2019	23/08/2019	1		Hold Update Complete
CENTRAL	GEORGE SQUARE, 50	1360285	PLUMBINGTOILETS	227-04-4.216	*S* The urinal in the 4th floor (nearest the do...	MS_CENTRAL	JAKE MASON	01/08/2019	08/08/2019	1		Hold Update Complete
CENTRAL	APPLETON TOWER	1360282	ELECTRICALLIGHTING	201-05-5.05	*EXAM* BY 05/08/19* Appleton Tower Computer La...	MS_CENTRAL	GORDON MCDUGALD	01/08/2019	05/12/2019	1		Hold Update Complete
CENTRAL	PATRICK GEDDES HALL	1360271	ELECTRICALLIGHTING	860	*S* Patrick Geddes 207-210 bedroom 207, cellin...	MS_CENTRAL	NEIL WATSON	01/08/2019	08/08/2019	1		Hold Update Complete
CENTRAL	ECA MAIN BUILDING	1360267	PLUMBINGINVESTIGATE DAMP	421-02	*S* Main Building - C floor - Section of the ex...	MS_CENTRAL	GRAHAM SIMPSON	01/08/2019	08/08/2019	1		Hold Update Complete
CENTRAL	NORTH EAST STUDIO BUILDING	1360266	PLUMBINGEXTERNAL DRAINAGE	422-05	*S* North East Studio Building - L Floor - Outs...	MS_CENTRAL	GRAHAM SIMPSON	01/08/2019	08/08/2019	1		Hold Update Complete
CENTRAL	BUCCLEUCH PLACE,30	1360245	JOINERYFIXTURES & FITTINGS	260	*RECHARGE* We have five wall screen brackets th...	MS_CENTRAL	CRAIG FLEMING	01/08/2019	05/12/2019	1		Hold Update Complete
CENTRAL	BAYES CENTRE	1360235	ELECTRICSOCKETS/PORTS/SWITCHE	285	*S* Could I ask to check the power in the floor...	MS_CENTRAL	NEIL WATSON	01/08/2019	08/08/2019	1		Hold Update Complete
CENTRAL	BUCCLEUCH PLACE,01 - 13	1360229	JOINERYDOORS AND LOCKS	231	*S* "MMO" Linked wr - 2 391 Buccleuch Place Ba...	MS_CENTRAL	WILLIAM POTTINGE	01/08/2019	08/08/2019	1		Hold Update Complete
CENTRAL	WIGH IGHM NORTH BLDG (HMC)	1360228	HEATING ENGINEERAIR CONDITION	2318-01-ML07	*S* ML07 Side lab off main lab - aircon unit h...	MS_CENTRAL	GARY WALLS	01/08/2019	08/08/2019	1		Hold Update Complete
CENTRAL	POTTERBROW - CHARLAINCY	1360224	HEATING ENGINEERWATER	108-00-G.204	*S* Customer complaints that the water temper...	MS_CENTRAL	CRAIG CUMMING...	01/08/2019	08/08/2019	3		Hold Update Complete
CENTRAL	BUCCLEUCH PLACE,01 - 13	1360207	JOINERYDOORS AND LOCKS	231	*S* "MMO" Linked wr - 2 291 Buccleuch Place bed...	MS_CENTRAL	DOUGIE RODGERS	01/08/2019	08/08/2019	1		Hold Update Complete
CENTRAL	BUCCLEUCH PLACE,01 - 13	1360206	JOINERYDOORS AND LOCKS	231	*S* "MMO" Linked wr - 2 392 Buccleuch Place kit...	MS_CENTRAL	WILLIAM POTTINGE	01/08/2019	08/08/2019	1		Hold Update Complete
CENTRAL	BUCCLEUCH PLACE,01 - 13	1360205	JOINERYDOORS AND LOCKS	231	*S* "MMO" Linked wr - 3a Buccleuch Place Hall c...	MS_CENTRAL	STUART WRIGHT	01/08/2019	08/08/2019	1		Hold Update Complete
CENTRAL	BUCCLEUCH PLACE,01 - 13	1360203	JOINERYDOORS AND LOCKS	231	*S* "MMO" 1 Buccleuch Place bathroom C, linked ...	MS_CENTRAL	WILLIAM POTTINGE	01/08/2019	08/08/2019	1		Hold Update Complete
CENTRAL	BUCCLEUCH STREET,12	1360199	PLUMBINGINVESTIGATE DAMP	268-02	*U15* 12/4 Buccleuch Street 2FR Investigate dam...	MS_CENTRAL	BEN HARRIS	01/08/2019	22/08/2019	1		Hold Update Complete
CENTRAL	GEORGE SQ,01/NEUROSCIENCE	1360192	ELECTRICALLIGHTING	208-05	*S* There are two lights out in this room. One ...	MS_CENTRAL	NEIL WATSON	01/08/2019	08/08/2019	1		Hold Update Complete
CENTRAL	WIGH IGHM WTRCP (CLINICAL)	1360191	HEATING ENGINEERAIR CONDITION	2318	*S* G/F Reception Air con is not working G/F Re...	MS_CENTRAL	GARY WALLS	01/08/2019	08/08/2019	1		Hold Update Complete
CENTRAL	WIGH IGHM SOUTH BLDG (CAN RES)	1360157	HEATING ENGINEERHEATING/VENT	2316-02-52.15	*U15* Rhythical irritating noise coming from c...	MS_CENTRAL	GARY WALLS	01/08/2019	22/08/2019	1		Hold Update Complete
CENTRAL	BUCCLEUCH PLACE,21	1360154	PLUMBINGTOILETS	251-03-3.22	*S* 21 BP 3rd floor - HL toilet seat is broken...	MS_CENTRAL	JAKE MASON	01/08/2019	08/08/2019	1		Hold Update Complete
CENTRAL	THE UOE BUSINESS SCHOOL	1360150	PLUMBINGWASH BASINS/SINKS	226-01-1.217	*S* HL in the 1st floor ladies toilet sink are...	MS_CENTRAL	JAKE MASON	01/08/2019	08/08/2019	1		Hold Update Complete
CENTRAL	THE UOE BUSINESS SCHOOL	1360148	ELECTRICALLIGHTING	226-01-1.222	*S* HL the staff toilet on level 1 doesn't have...	MS_CENTRAL	BILLY THOMPSON	01/08/2019	08/08/2019	1		Hold Update Complete
CENTRAL	WIGH IGHM TRANSCIENCE BLDG (EVANS)	1360154	HEATING ENGINEERCALORIFIERS	2317	*U15* Replace PHX 2 high limit valve at Evans bu...	MS_CENTRAL	GARY WALLS	01/08/2019	22/08/2019	1		Hold Update Complete
CENTRAL	GEORGE SQUARE, 50	1360127	JOINERYDOORS AND LOCKS	227-00-G.201	*U15* Duma required PD 405432 **URG* "U1.07...	MS_CENTRAL	KAREN BRECHIN	01/08/2019	15/08/2019	1		Hold Update Complete

Total records: 8,081

The information will then sort to show works requests grouped by Craftsperson the works request has been assigned to **(B)**, if you click again it will sort by reverse

Building Operations Console

Show: All Site Building Floor Problem Type More Clear Filter Recent Group By Status

0 selected

Assigned to Work Order (0/47)

Issued and In Process (51/262)

Site	Building Name	Work Request Code	Problem Type	Location	Work Description	Work Team Code	Assigned To	Date Work Requested	Due Date	No. of	Repair Type			
CENTRAL	INFORMATICS	1559201	CALL OUT/HEATING ENGINEER	282	High Temperature Chilled Water Informatics Foru...	MS_CENTRAL	ALAN ORR	25/07/2019	24/08/2019	1		Hold	Update	Complete
CENTRAL	LIBRARY, GEORGE SQ	1559280	CALL OUT/HEATING ENGINEER	224	Chillbeams are dripping with water on to the fl...	MS_CENTRAL	ALAN ORR	25/07/2019	24/08/2019	1		Hold	Update	Complete
CENTRAL	BUCCLEUCH STREET12	1560199	PLUMBING/INVESTIGATE DAMP	268-02	**15* 12/4 Buccleuch Street 2FR Investigate dam...	MS_CENTRAL	BEN HARRIS	01/08/2019	22/08/2019	1		Hold	Update	Complete
CENTRAL	TEVIOT PLACE, 17	1559693	PLUMBING/WASH BASINS/SINKS	3020	**15* 17/5 Teviot Place - Please note tenant stat...	MS_CENTRAL	BEN HARRIS	29/07/2019	05/08/2019	1		Hold	Update	Complete
CENTRAL	POTTERROW - CLIMPLAINCY	1559640	PLUMBING/TOILETS	108-00	**5* Toilet seats has come off in Ladies Toilet...	MS_CENTRAL	DCN HARRIS	29/07/2019	05/08/2019	1		Hold	Update	Complete
CENTRAL	ASCHAM COURT	1559594	PLUMBING/SHOWERS	3253	**5* house 13 ground floor shower blocked	MS_CENTRAL	BEN HARRIS	29/07/2019	05/08/2019	1		Hold	Update	Complete
CENTRAL	ASCHAM COURT	1559574	PLUMBING/SHOWERS	3253	**15* Flat 14 downstairs shower sealant needs t...	MS_CENTRAL	BEN HARRIS	29/07/2019	19/08/2019	1		Hold	Update	Complete
CENTRAL	NEW COLLEGE	1559229	PLUMBING/EXTERNAL DRAINAGE	401	**5* We have a problem with rainwater backing up...	MS_CENTRAL	BEN HARRIS	25/07/2019	01/08/2019	1		Hold	Update	Complete
CENTRAL	ROYAL MED SOCIETY	1558752	PLUMBING/TOILETS	3251	**15* Royal med society - the right hand side to...	MS_CENTRAL	BEN HARRIS	23/07/2019	13/08/2019	1		Hold	Update	Complete
CENTRAL	ECA MAIN BUILDING	1558603	PLUMBING/TOILETS	421-01-8.51	**5* ECA Main Building - B.51 Basement Ladies to...	MS_CENTRAL	BEN HARRIS	23/07/2019	30/07/2019	1		Hold	Update	Complete
CENTRAL	LAURISTON FIRE STATION	1558602	PLUMBING/TOILETS	426-02-2.217	**5* ECA Fire Station - 2.217 Ladies toilet The ...	MS_CENTRAL	BEN HARRIS	23/07/2019	30/07/2019	1		Hold	Update	Complete
CENTRAL	GEORGE SQ/1/NEUROSCIENCE	1564614	PLUMBING/TOILETS	208-04-4.27	**5* Halls the toilet nearest the sinks in the 4...	MS_CENTRAL	BEN HARRIS	10/07/2019	17/07/2019	1		Hold	Update	Complete
CENTRAL	ASCHAM COURT	1552647	PLUMBING/WASH BASINS/SINKS	3253	**15* house 8 room 3 room sink read.	MS_CENTRAL	BEN HARRIS	24/04/2019	17/07/2019	1		Hold	Update	Complete
CENTRAL	LIBRARY, GEORGE SQ	1560040	PLUMBING/TAPS	224-02-2.227	**15* 2.227 For Ben - Please replace grating and...	MS_CENTRAL	BEN HARRIS...	31/07/2019	21/08/2019	2		Hold	Update	Complete
CENTRAL	ASCHAM COURT	1558747	JOINERY/FIXTURES & FITTINGS	3253	House 10 - Please fit new shower screen as dsc...	MS_CENTRAL	BEN HARRIS...	23/07/2019	26/11/2019	2		Hold	Update	Complete
CENTRAL	DUGALD STEWART BUILDING	155297	PLUMBING/LEAK	283-01-1.10	**URG* There is a leak at street level below roo...	MS_CENTRAL	BEN HARRIS...	22/04/2019	06/05/2019	4	MISCELLANEOUS	Hold	Update	Complete
CENTRAL	HUGH ROBSON BUILDING	1559644	HEATING/ENGINEER/WATER	210-1-8.202	**5* Water ingress into the basement plantroom a...	MS_CENTRAL	BILLY MCARTHUR...	29/07/2019	05/08/2019	4		Hold	Update	Complete
CENTRAL	ECA MAIN BUILDING	1552957	ELECTRICAL/EMERGENCY LIGHTING	421	FAO Compliance Team Please renumber the emergen...	MS_CENTRAL	BILLY MCARTHUR...	28/06/2019	01/11/2019	2		Hold	Update	Complete
CENTRAL	BAYES CENTRE	1560222	ELECTRICAL/LIGHTING	285-1-8.206	**5* Cleaners cupboard in basement B.206 light o...	MS_CENTRAL	BILLY THOMPSON	02/08/2019	09/08/2019	1		Hold	Update	Complete
CENTRAL	THE UOE BUSINESS SCHOOL	1560148	ELECTRICAL/LIGHTING	226-01-1.222	**5* Hi, the staff toilet on level 1 doesn't hav...	MS_CENTRAL	BILLY THOMPSON	01/08/2019	08/08/2019	1		Hold	Update	Complete
CENTRAL	CHRISTAL MACMILLAN BUILDING	1560090	ELECTRICAL/SOCKETS/PORTS/SWITCHE	112-01	**15* CHB 1st Fl corridor, b/w Rm 1.04 and 1.05 ...	MS_CENTRAL	BILLY THOMPSON	31/07/2019	21/08/2019	1		Hold	Update	Complete
CENTRAL	CHRISTAL MACMILLAN BUILDING	1559955	ELECTRICAL/LIGHTING	112	**EXAM* BY 05/08/19* CHB Seminar Room 1/2-0 - ...	MS_CENTRAL	BILLY THOMPSON	31/07/2019	04/12/2019	1		Hold	Update	Complete
CENTRAL	CHRISTAL MACMILLAN BUILDING	1559880	ELECTRICAL/LIGHTING	112-00	**15* One of the pendant light bulbs above the c...	MS_CENTRAL	BILLY THOMPSON	30/07/2019	20/08/2019	1		Hold	Update	Complete
CENTRAL	GEORGE SQUARE, 50	1559677	ELECTRICAL/LIGHTING	227-01-1.12	**15* The lights in Room 1.12 cannot be switched...	MS_CENTRAL	BILLY THOMPSON	29/07/2019	19/08/2019	1		Hold	Update	Complete
CENTRAL	GEORGE SQUARE, 50	1559674	ELECTRICAL/LIGHTING	227-01	**15* A section of the perimeter lights is out L...	MS_CENTRAL	BILLY THOMPSON	29/07/2019	19/08/2019	1		Hold	Update	Complete
CENTRAL	THE UOE BUSINESS SCHOOL	1559566	ELECTRICAL/EMERGENCY LIGHTING	226	**15* faults.8.621.640.668.692.712.724.	MS_CENTRAL	BILLY THOMPSON	26/07/2019	16/08/2019	1	REPAIR EMERGENCY LIGHT	Hold	Update	Complete
CENTRAL	LIBRARY ANNEXE 2	1559227	ELECTRICAL/EMERGENCY LIGHTING	935	**15* repair faults as per spreadsheet	MS_CENTRAL	BILLY THOMPSON	25/07/2019	15/08/2019	1		Hold	Update	Complete
CENTRAL	GEORGE SQUARE, 50	1552998	ELECTRICAL/SOCKETS/PORTS/SWITCHE	227-01-1.06A	**15* Little room on the left of 1.06 Can we hav...	MS_CENTRAL	BILLY THOMPSON	28/06/2019	19/07/2019	1		Hold	Update	Complete
CENTRAL	HOPE PARK SQ/08	1547855	ELECTRICAL/LIGHTING	3025-00	**15* Please replace light in living room with a...	MS_CENTRAL	BILLY THOMPSON	12/06/2019	03/07/2019	1		Hold	Update	Complete
CENTRAL	RIEGO STREET	1559656	ELECTRICAL/LIGHTING	3184	**15* block 13 3rd floor stair lights flickering	MS_CENTRAL	CONNER CARMICHAEL	29/07/2019	19/08/2019	1		Hold	Update	Complete
CENTRAL	EDWARD SALVESON HALL	1559596	ELECTRICAL/LIGHTING	861	**5* Edward Salveson room 503, please attend - c...	MS_CENTRAL	CONNER CARMICHAEL	29/07/2019	05/08/2019	1		Hold	Update	Complete
CENTRAL	ECA HUNTER BUILDING	1559588	ELECTRICAL/LIGHTING	423-00-N.33	**15* ECA Hunter - N.33 The light is flickering ...	MS_CENTRAL	CONNER CARMICHAEL	29/07/2019	19/08/2019	1		Hold	Update	Complete

Total records: 8,081

2.1.3 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 be 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.

Building Operations Console

Show: 200 Newest Requests Building Floor Room Problem Type More Clear Filter Recent Group By Problem Type

0 selected

Assigned to Work Order (2)

Issued and In Process (5)

Stopped (1)

Completed (2)

Work Request Code	Problem Type	Location	Work Description	Due Date	Work Order
3864148	EXTERNAL DOORS/UNSECURE	1-03-3.413	Door not locking	26/08/2016	3864139
3864147	ELECTRICAL/GENERATORS	1-05-5.21	not working as expected	26/08/2016	3864140
3864149	JOINERY/FIXTURES & FITTINGS	1-02-2.2438	Coming away from the wall	02/09/2016	3864137
3864145	ELECTRICAL/POWER	1-1-1.8.01	Plug socket not working	02/09/2016	3864136
3864142	FIRE SAFETY/VEAC SIGNAGE	1-1-1.8.01	Electrical Problem Description	01/09/2016	3864134
3864140	JOINERY/DOORS AND LOCKS	305-00	check door	31/08/2016	3864132
3864150	CLEANING/BLOOD	1	Test Work Request Primary Trade	19/08/2016	3864138
3864141	ELECTRICAL/ELECTRICAL EQUIPMENT	1-01-1.201	Electrical Problem Description	01/09/2016	3864133

Total records: 8

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

Show200 Newest RequestsBuildingFloorRoomProblem TypeMoreClearFilterRecentGroup ByProblem Type

0 selected

Work Request Code

Location

Work Description

Due Date

Supervisor

Status

▼BLINDS/CURTAINS|NEW INSTALLATION(1)

3864151

201-02-2.10

test to see if leaving UYAWL tick box ticked, u...

16/12/2016

Requested

▼CALL OUT|PLUMBER(1)

3864153

1--1-B.07

billy bob requested to attend 2000hrs

15/09/2016

Issued and In Process

▼CLEANING|BLOOD(1)

3864150

1

Test Work Request Primary Trade

19/08/2016

ATL01

Completed

▼CLEANING|CARPET SHAMPOO(2)

3864155

1-00-G.103

Carpet stained due to leakage

21/12/2016

ATL01

Completed

3864154

1-01-1.286

Carpet heavily stained

21/12/2016

ATL01

Completed

▼CONTRACTOR(1)

3863884

329-01-1.21

Faulty drain (KD 1c)

25/07/2016

AFH|(AFH)

Approved

▼CONTRACTOR|DECORATION(1)

3863906

6201

NT 4C

AFH|(AFH)

Approved

▼DECORATION|EXTERNAL(1)

3864152

1--1-B.01C

White paint please

19/12/2016

Requested

▼ELECTRICAL| POWER(2)

3864146

1--1-B.02A

Power out

02/09/2016

Requested

3864145

1--1-B.01

Plug socket not working

02/09/2016

ATL01

Issued and In Process

▼ELECTRICAL|ELECTRICAL EQUIPMENT(2)

3864158

1

please supply and test new electrical equipment.

08/09/2016

Assigned to Work Order

3864141

1-01-1.201

Electrical Problem Description

01/09/2016

ATL01

Completed

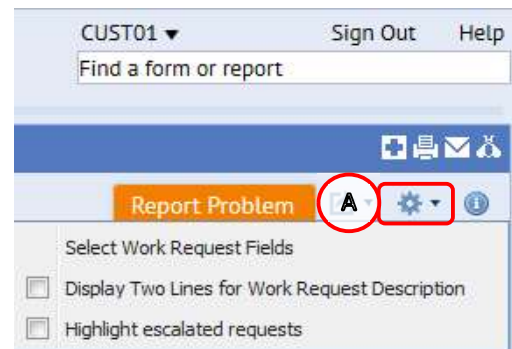
▼ELECTRICAL|EMERGENCY LIGHTING(3)

2.1.4 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 an area team leader, including details of who the work has been assigned to may help you assess your team's availability.

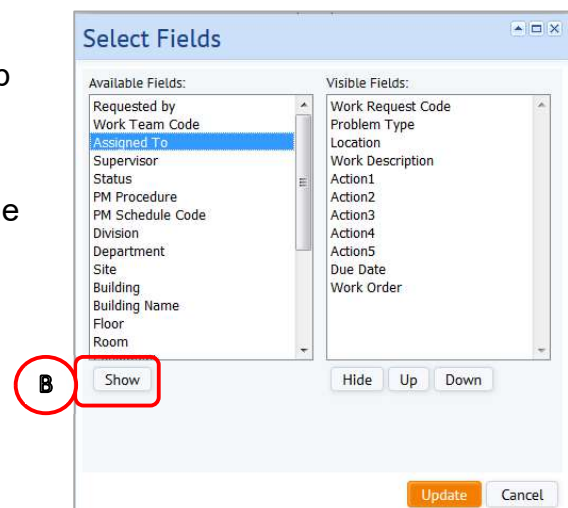
Selecting the **(A) Edit** icon will display an option list, choose the **Select Work Request Fields** option.



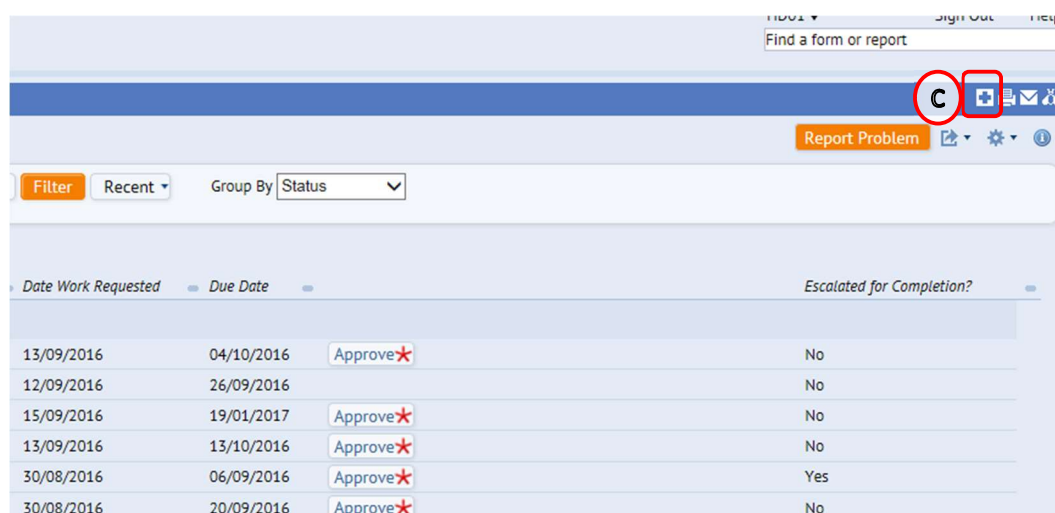
The system will display a **Select Fields** pop up screen.

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, and then select the **(B) Show** option.



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



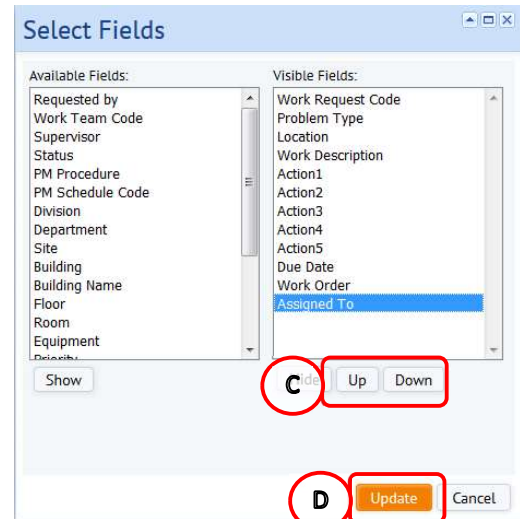
The selected item will move from the left-hand column into the right-hand column.

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).



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

Helpdesk Operators <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 	Supervisor <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 	Customer <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
Alternative fields		
<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. 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 has now [beingbeen](#) 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

Issued and in Process: The Work Request is now with a Craftsperson and ready to work.

On Hold – Parts/Labour/Access (Optional): A Work Request can be put on hold for one of the noted circumstances.

Completed: The work pertaining to the Work Request has been completed. At this stage, the Customer Survey will become available for completion.

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

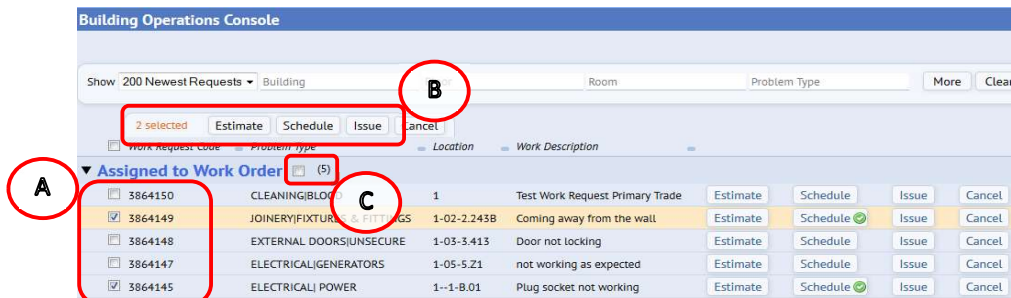
Assigned ———> Requested. If priority/location/problem type needs amended

Do not return to requested if has been issued in error

2.2.3 Processing Batched Work Requests

The system also allows the management 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.



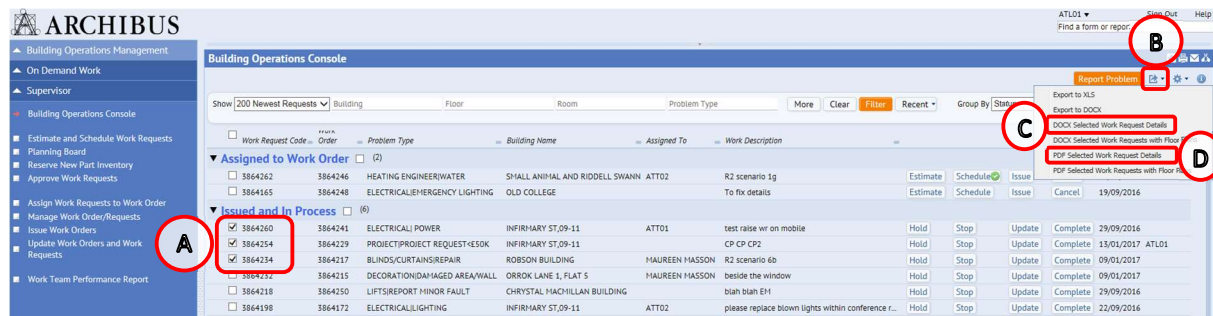
The **(B) Action Buttons** will be replicated at the top of the screen, that will allow you to process the selected group of work requests for the required action.

(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**.

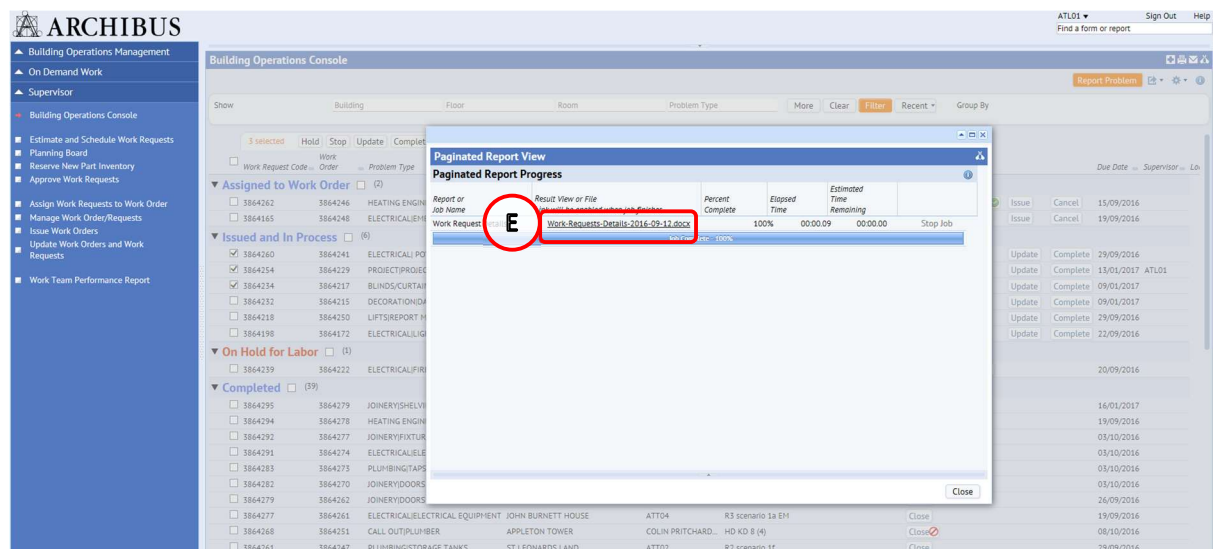
2.2.4 Printing Work Requests If Mobile App Is Out of Operation

Should the mobile application be unavailable, the ATL can print Work Requests from the Building Operations Console. To do this, first select the work requests you want to print by selecting **(A) tick boxes** next to the Work request number.



Then select the **(B) arrow icon**, and select either **(C) DOCX Select Work Request Details** (Word) or **(D) PDF Select Work Request Details**.

Once the report has completed, selected **(E) the document created**.



A word or PDF file will open separately with the content of the work requests, this can be printed or saved out with the system using the software package that opens.