EBIS
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

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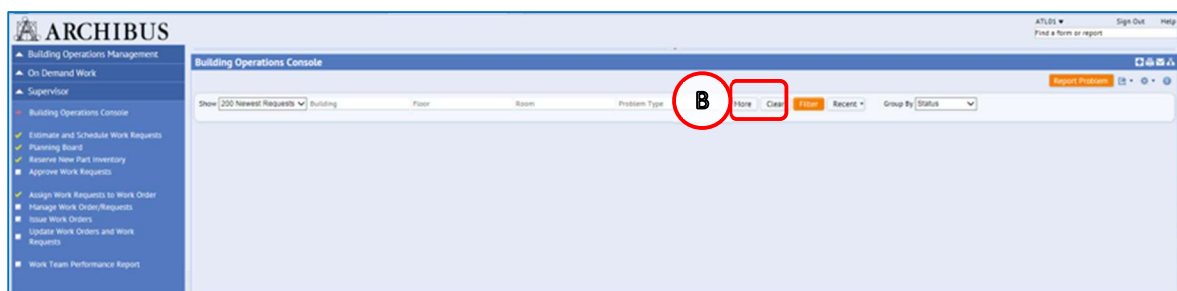
- Access the Building Operations Console to view Work Requests assigned to a specific work team queue
- Reviewing a Work Request
- Forwarding to another work team queue
- Assigning to a craftsperson(s)
- Completing a Work Request
- Cancelling a Work Request

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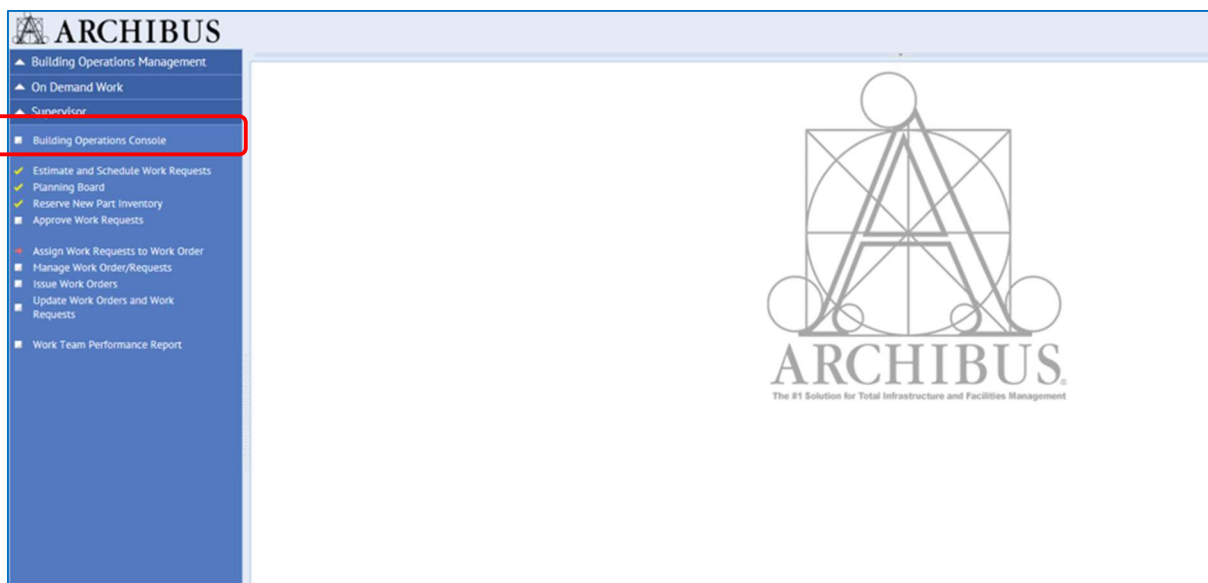
When you see the following screen, check the filters applied and then select the **(B) Filter** option.

(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).
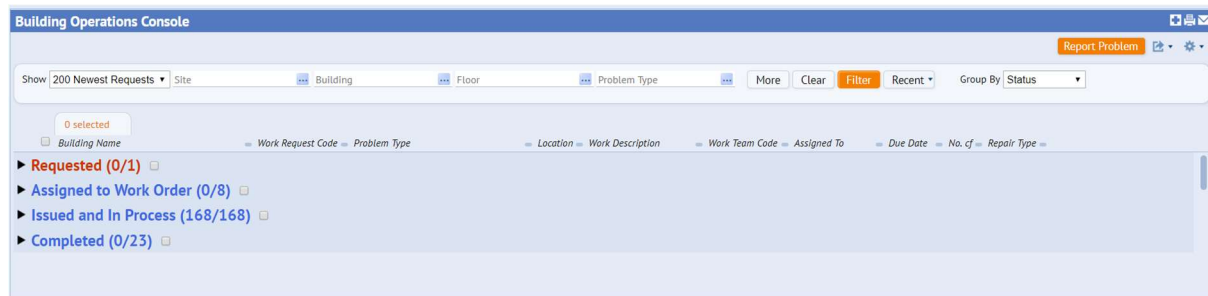
The following options will help to view the page:

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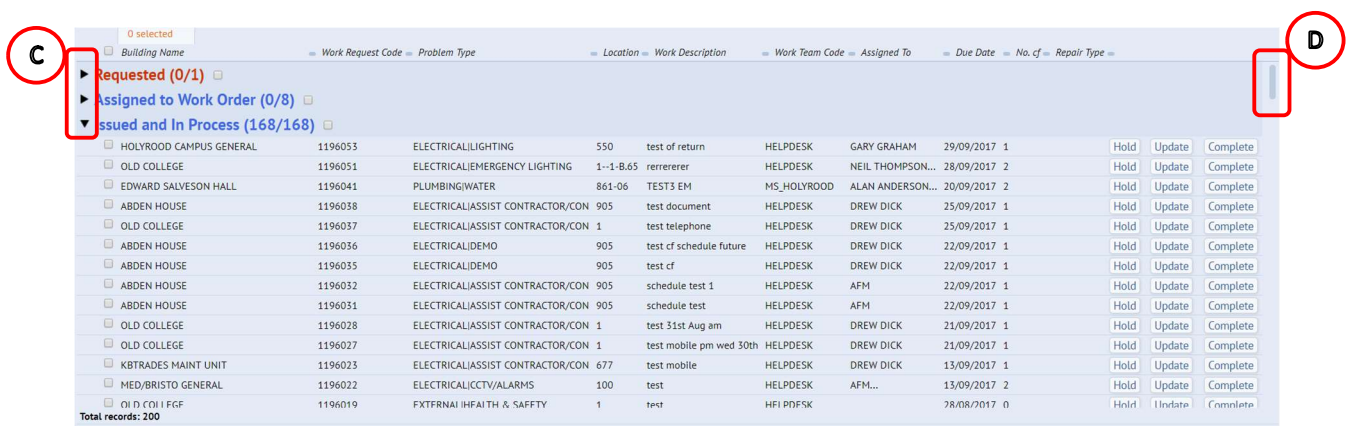
Refresh your screen regularly to view new work requests. Further work requests in your queue not currently showing on your screen, will be notified by the **(E) More, View Them** button, select this to load these work requests

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)

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.
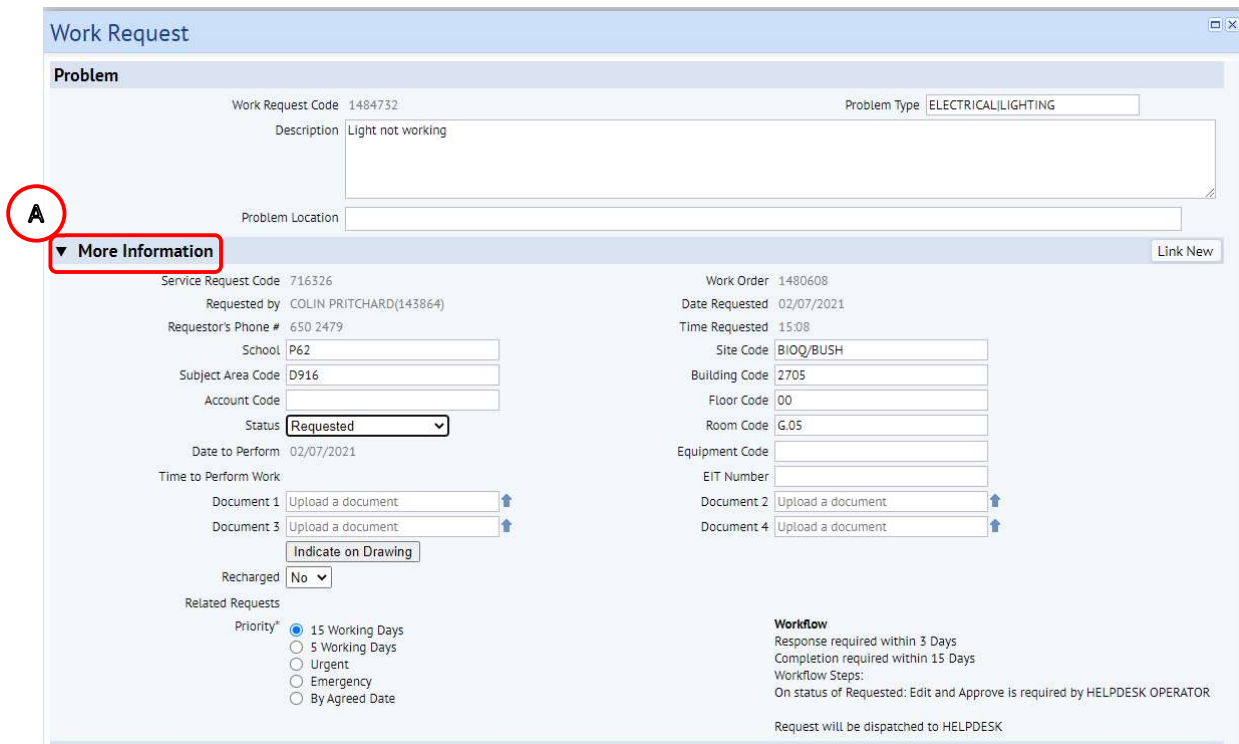

The **(B) Problem** section of the pop up screen will always be displayed, and will display the description and problem location free text added by the Customer.

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.

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**

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.

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**

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

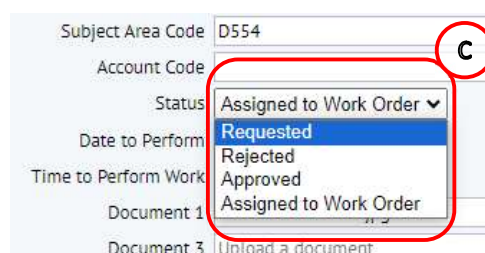Once you have selected the new status, the **Return Work Request** pop up screen displays.

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.
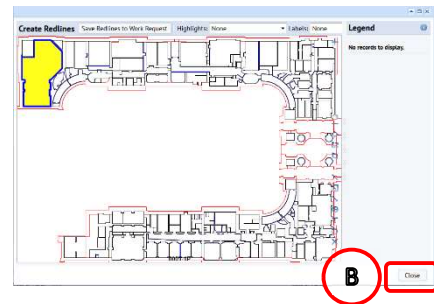
1.3.5. Viewing And Adding Documents/ Attachments

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)

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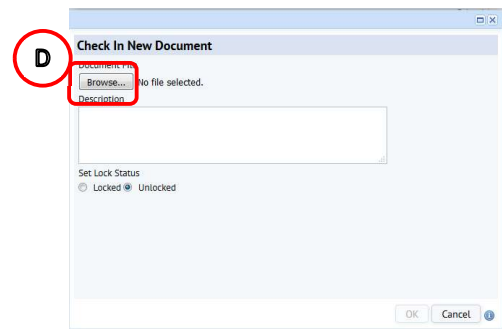
The system will then display the standard Microsoft **File Browser** pop up screen.

Navigate to the required file and either double click on it or select the **(E) Open** option.
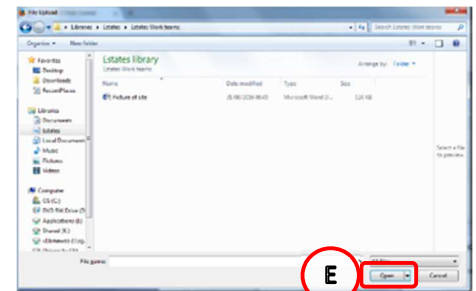
The system will then select the chosen file, close the **File Browser** Pop up screen and return you to the **Check In New Document** pop up screen.

(**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.
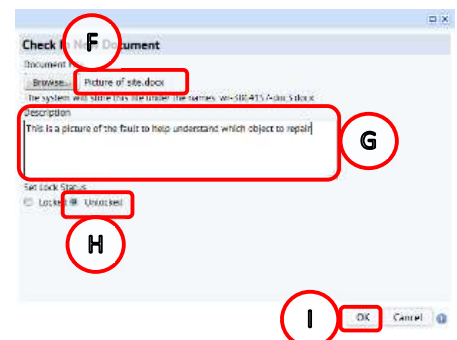
1.3.6. Viewing And Adding Comments

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)

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.**

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 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.

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**.

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

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.

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.

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

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.

The system will display the following pop-up screen.

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

(**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.

(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**)

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).

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.

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**)

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.

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.

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.

(**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.

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.

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).

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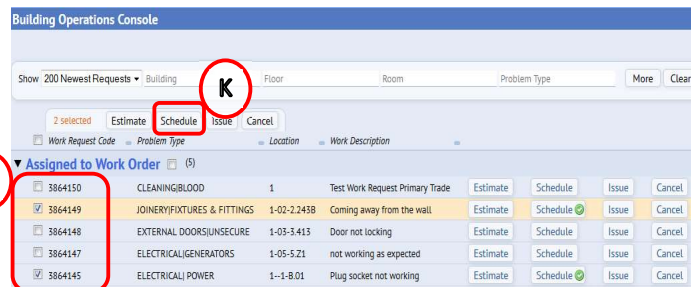
A **(K) Schedule** option will appear at the top of the screen, that will allow you to schedule the selected group.

(**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.

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.
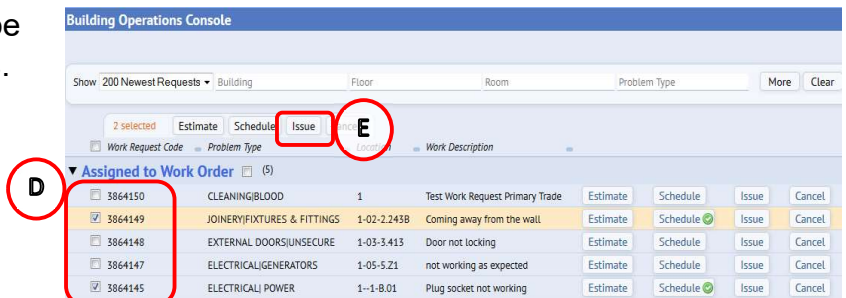
1.7. Placing A Work Request On Hold

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**)
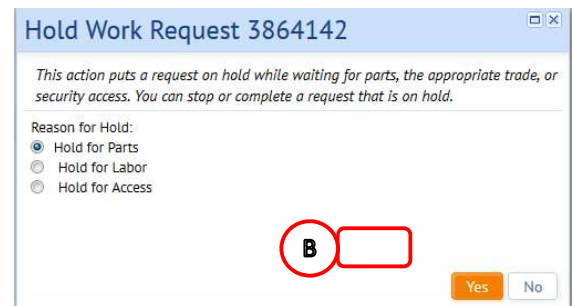
Maintenance Services **MUST** place a request On Hold for Parts before raising a purchase requisition.
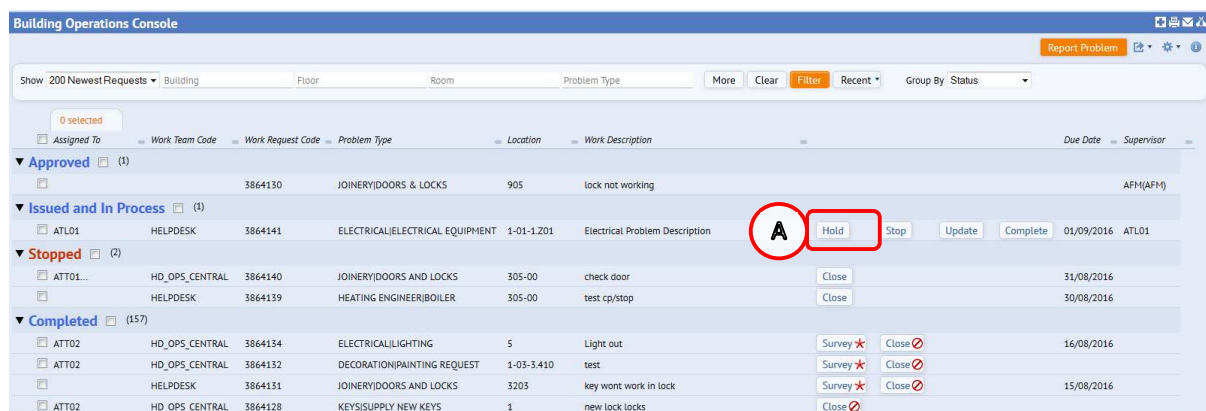
The system will display a Hold Work Request pop up screen, with 3 different options.

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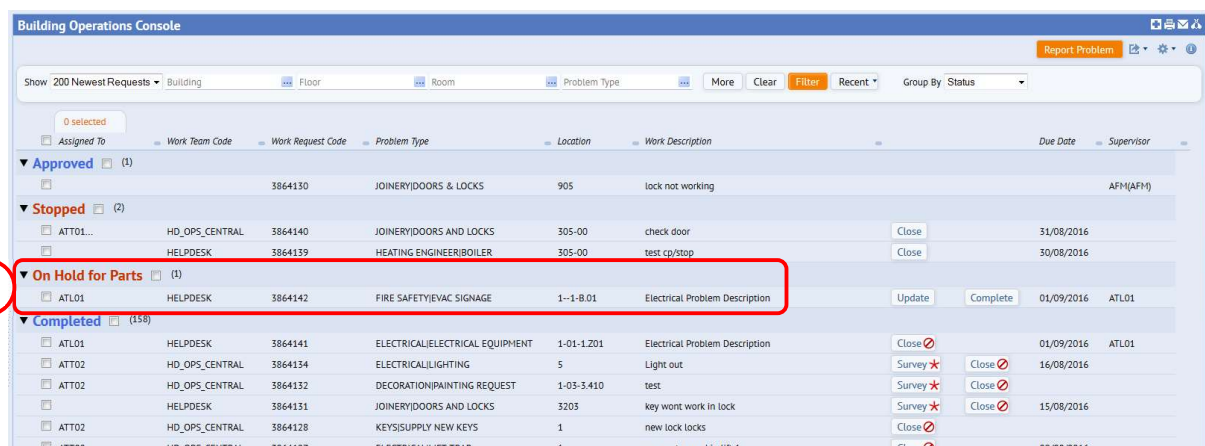
The system will close the Hold Work Request pop up screen and return you to the Building Operations Console screen. The Work Request will have moved from the **Issued And In Process** status section into the relevant **On Hold** section, in this instance to the **(C) On Hold For Parts** status section.

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.

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.

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.

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) ☐					
▶ Requested (0/2) ☐					
▶ Assigned to Work Order (0/7) ☐					
▼ Issued and In Process (10/10) ☐					
☐ FLOWAVE TT BUILDING	1196061	PLUMBING|FLOOD	676-01-1.Z3	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)					
☐ 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.Z06	lvjn;lkdzl	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)

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

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

(**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**
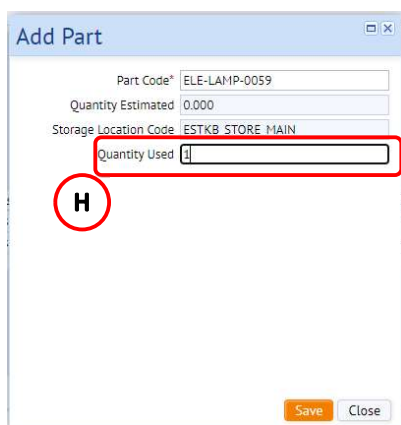
From Add Part pop up screen, click on List of Values against **(F) Part Code** [...] .
This will then open up the table to Find Parts.
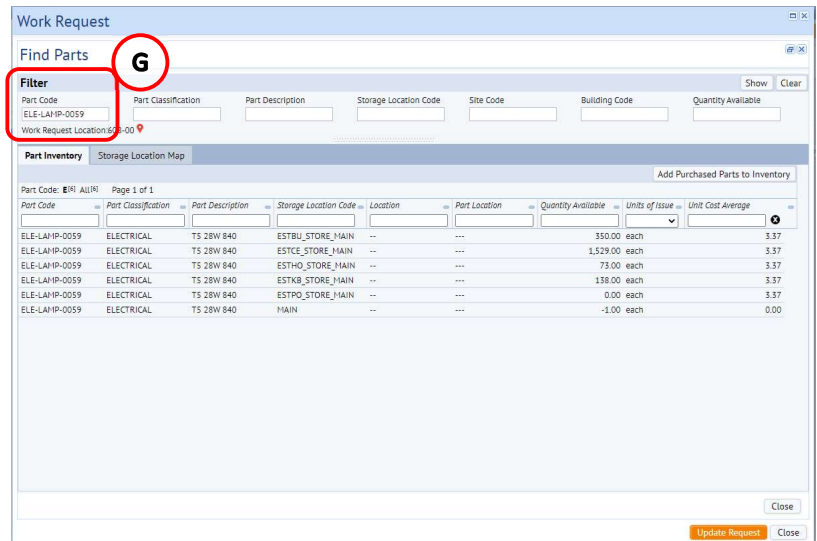
In **(G) Part Code** field type in the stock item you wish to add to Work Request and click on Show

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

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

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

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

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

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

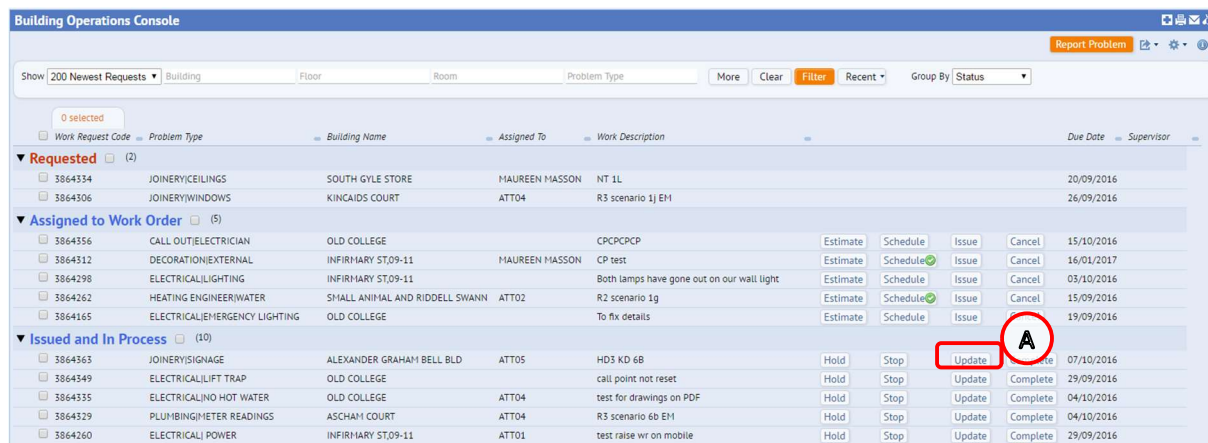The system will complete the Work Request and move it from the **Issued And In Process** status to the **(I) Completed** status section on the Building Operations Console screen pending **Verification**.

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.

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.

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:

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

Or

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

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.

(**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

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.

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

(**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**.
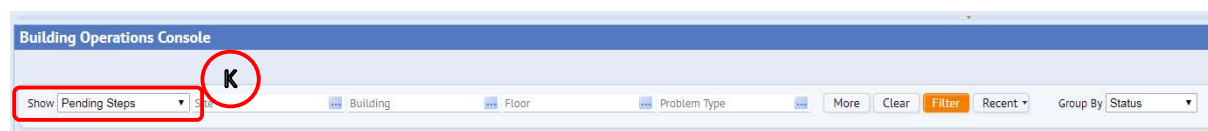

1.11 Verifying a WR

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.
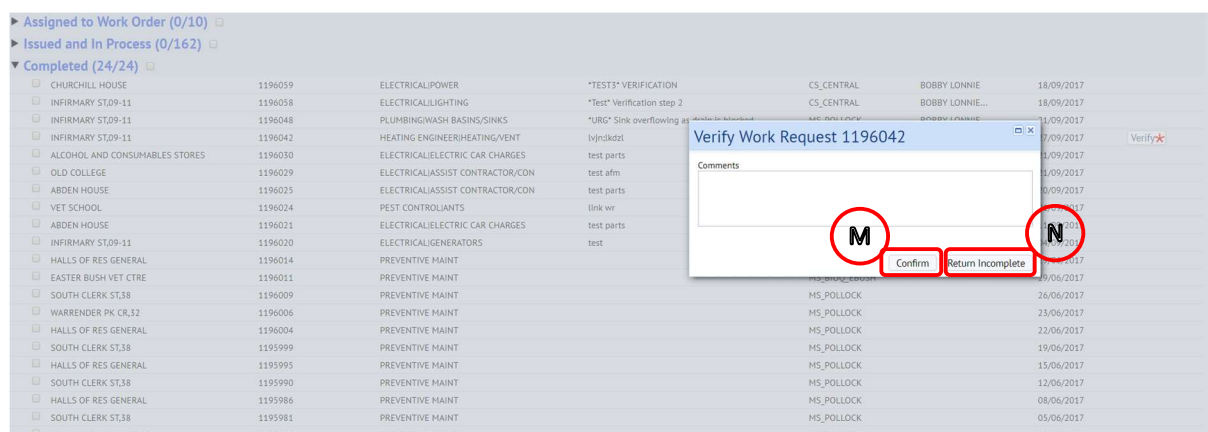

Select **(L) Verify** button and the **Verify Work Request** pop up screen displays**.**

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.

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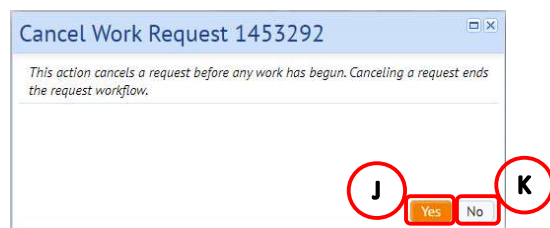
NOTE: Selecting **(K) No** will return you to the Building Operations Console with no changes made.

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
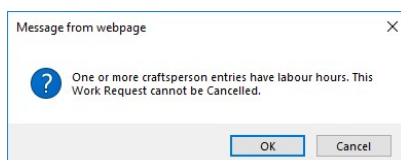5. Cancel Work Request

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 issused.

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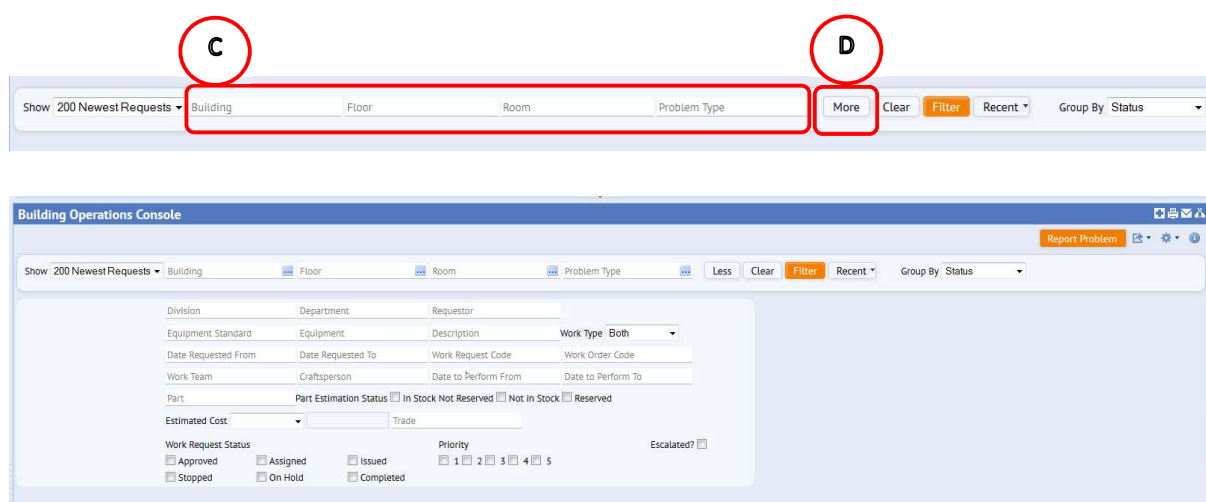
The **(A) Show** option will provide a drop-down list of generic searches, such as by status or Work Request age.

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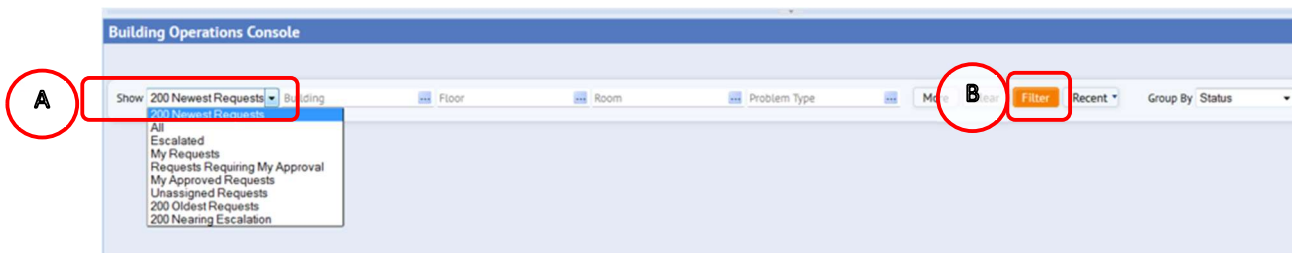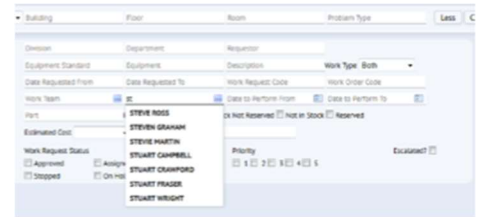

There are a range of filters by **(C) Location & Work Type**

Selecting the **(D) More** option offers a search on a wider range of Work Request information, such as date or assigned craftsperson.
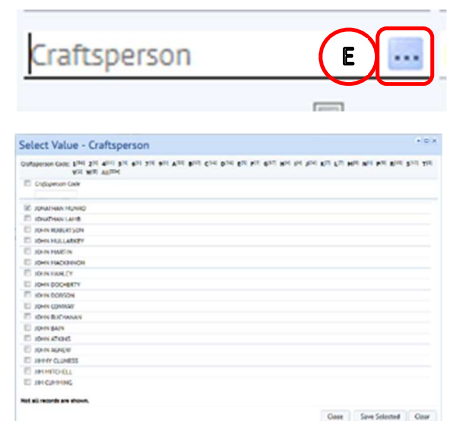
You can select information for the different fields in two different ways:

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.

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

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

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.

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

Show [200 Newest Requests ▼] [Building] [Floor] [Room] [Problem Type] [More] [Clear] [Filter] [Recent ▼]   Group By [Problem 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	AFM(AFM)	Approved
▼ **CONTRACTOR|DECORATION** ☐ (1)							
☐	3863906	6201	NT 4C			AFM(AFM)	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.Z01	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.
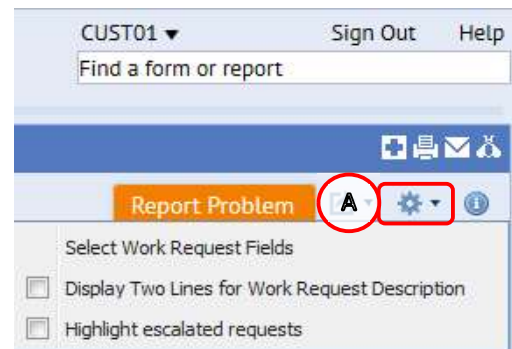
The system will display a **Select Fields** pop up screen.

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.
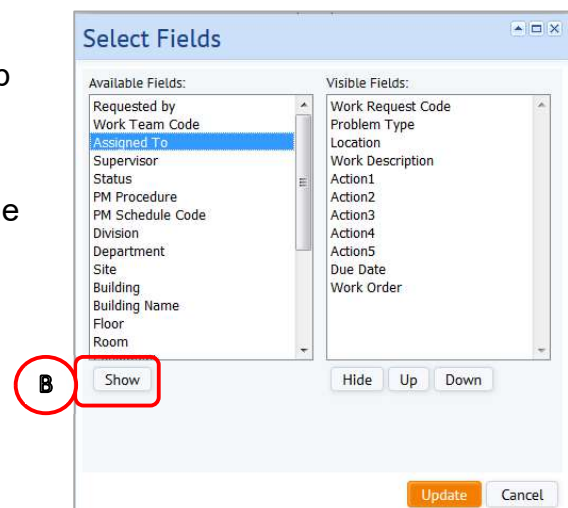
To save your preferred console setup select **(C)** icon, and confirm yes.
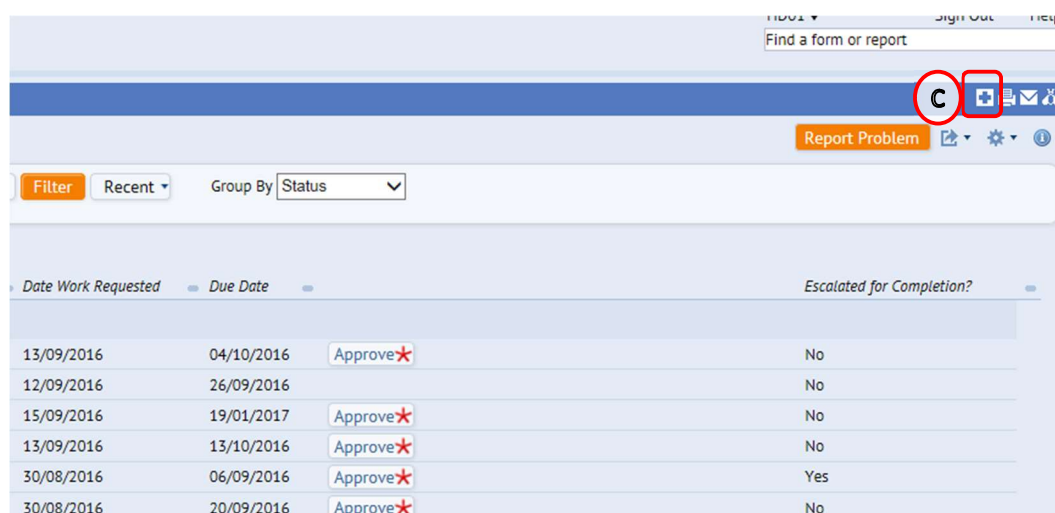
The selected item will move from the left-hand column into the right-hand column.

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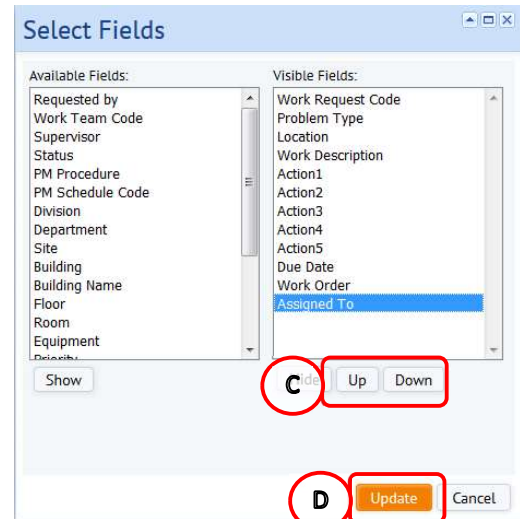
The following tables provide a recommended Building Operations Console screen layout:

Helpdesk Operators	Supervisor	Customer
- Building Name - Work Request Code - Problem Type - Work Description - Priority - Due Date - Action buttons 1 – 5 - Work Team Code	- Building Name - Work Request Code - Problem Type - Requested By - Work Description - Assigned To - Due Date - Action buttons 1 – 5 - Escalated for Completion	- 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		
- 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	- 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	- 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

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 ~~being~~been 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 mangment of work requests to be carried out in batches or groups of work requests.

From the Building Operations Console screen, select the **(A) Tick Boxes** next to the work requests that you wish to action.
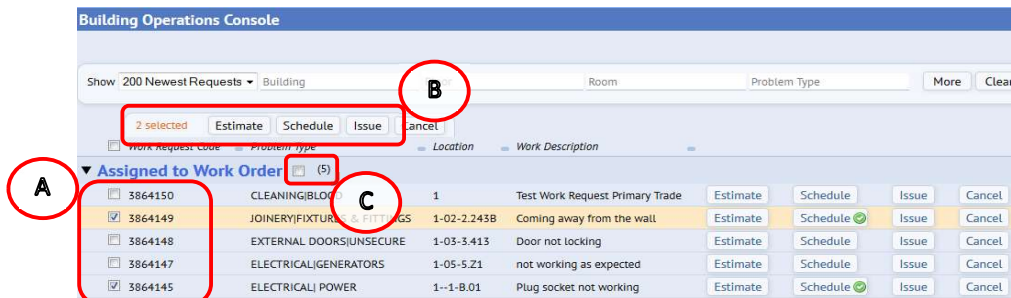
The **(B) Action Buttons** will be replicated at the top of the screen, that will allow you to process the selected group of work requests for the required action.

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

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

2.2.4   Printing Work Requests If Mobile App Is Out ~~Of~~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.
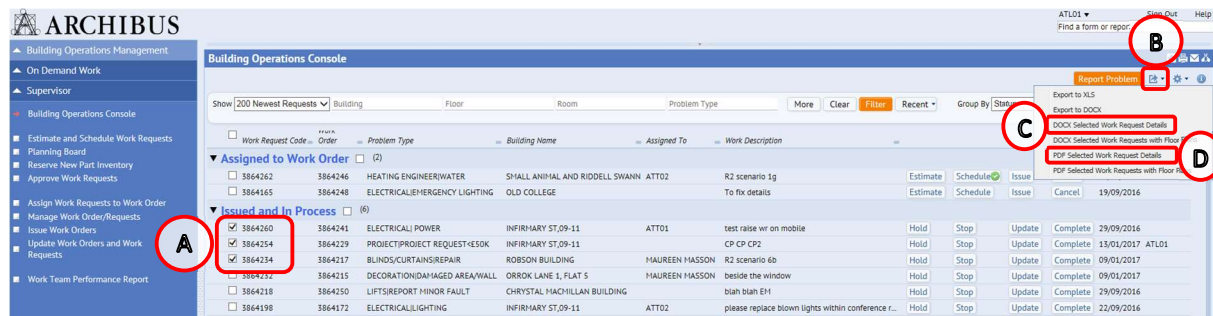
Then select the **(B) arrow icon**, and select ether **(C) DOCX Select Work Request Details** (Word) or **(D) PDF Select Work Request Details**.

Once the report has completed, selected **(E) the document created**.
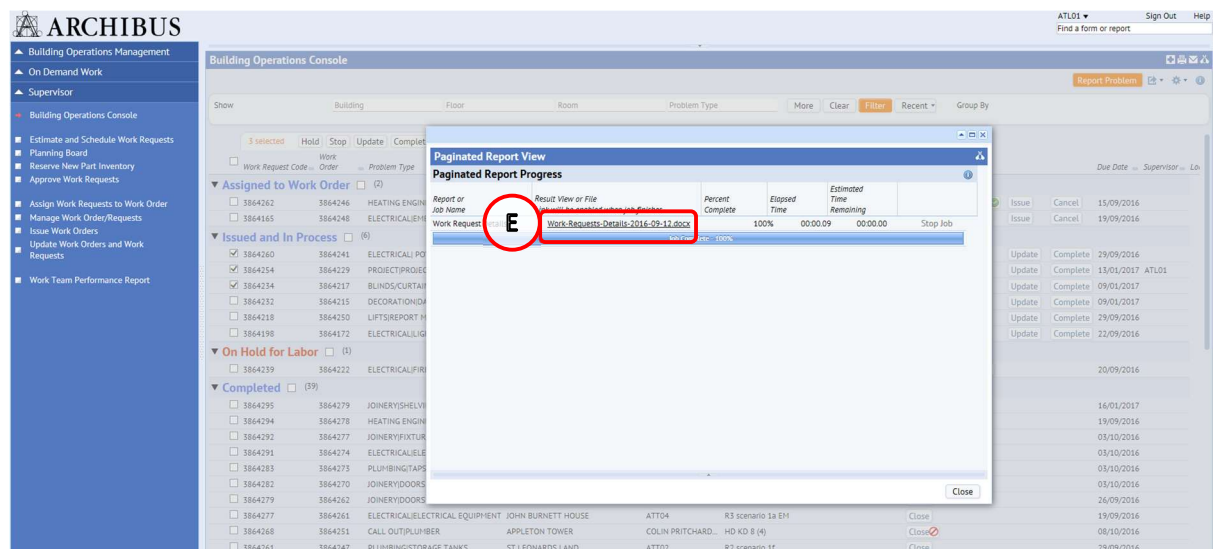
A word or PDF file will open separately with the content of the work requests, this can be printed or saved out with the system using the software package that opens.