



Estates and Buildings Information System

User Guide

Web Central v23

Customer

*Report a Fault/Raise a Work
Request*

Foreword

This User Guide has been designed to support those staff with responsibilities for reporting faults or raising work requests via the Estates Department Helpdesk on behalf of their school or department.

System Support

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

More information on the EBIS Project is available at:

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

Logging on to Web Central

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

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

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

Estates Helpdesk

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

Accessibility

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

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Document Version Control

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
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30/11/2020	Eileen Mullan	V1.4	General Review
09/12/2022	Eileen Mullan	V1.5	Review in line with P&M introduction Various screenshots updated
04/10/2024	Eileen Mullan	V1.6	Update customer survey screen shot

1. Report a Fault/Request Small Works

1.1. Purpose

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

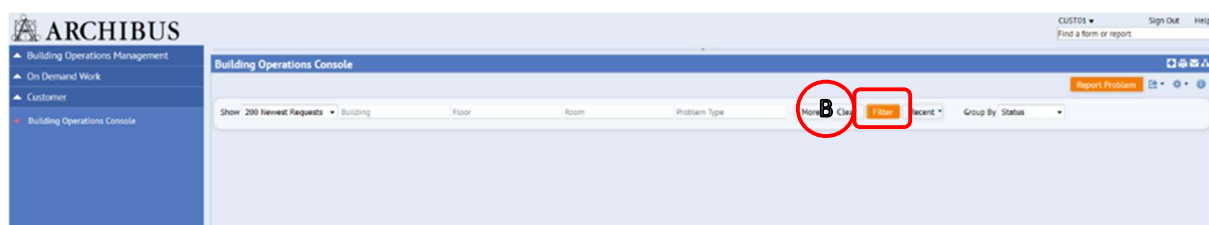
- Raising a Work Request (WR)
- Adding requestor details, location, problem and description details

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.

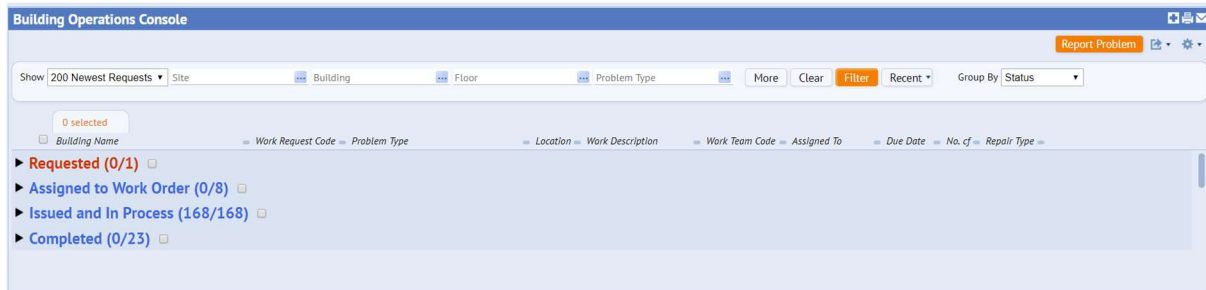


(See **Appx A** to review the filters and column setup for the Building Operations Console page. Setting a filter to return a limited number of work requests will enhance the speed of the system)

After selecting the **(B) Filter** option, the system will return the 200 Newest Requests to your Building Operations Console page grouped by status.

This screen is broken down into sections based on the Work Request lifecycle.
(See **Appx B** to understand the lifecycle of a work request)

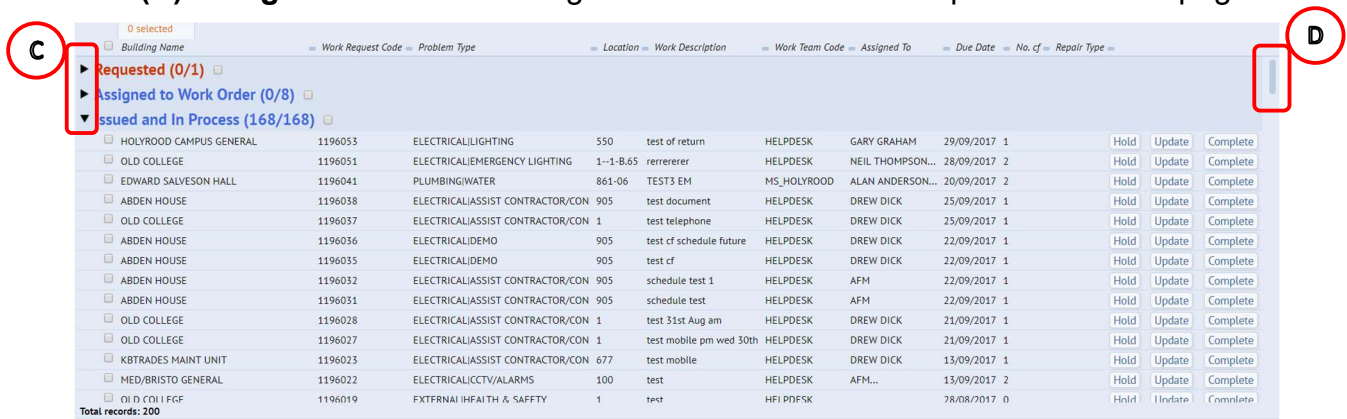
The page will load with the status bands collapsed, but indicating how many requests are in each band.



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.

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



Expanding each section will show up to 50 WRs initially. If there are more than 50, you will be asked if you want to load more requests into the status band by the **(E) More, View them** button



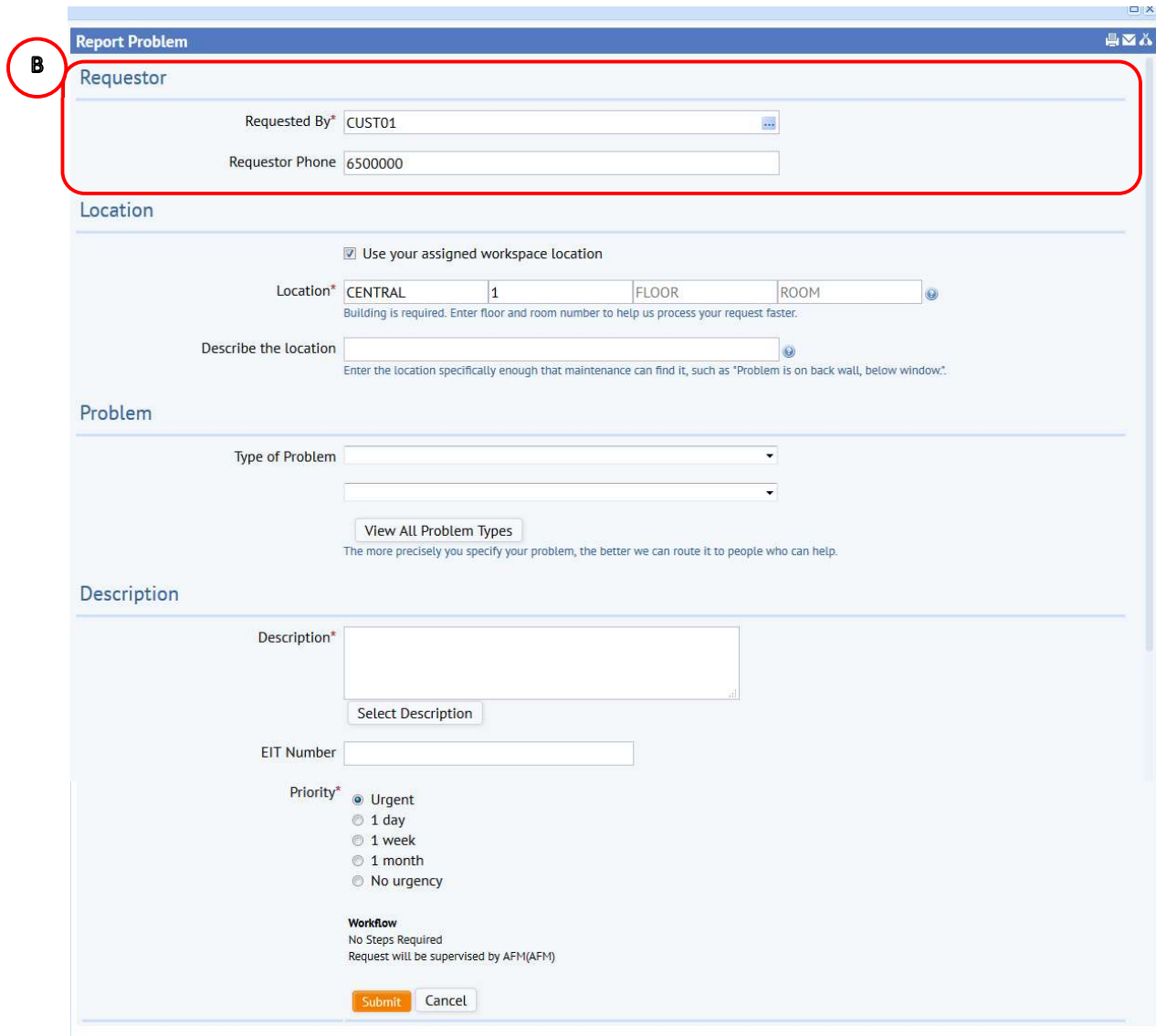
1.3. Raising A New Work Request

To raise a new request, select the **(A) Report Problem** option.



The screenshot shows the top navigation bar of the system. A red circle labeled 'A' highlights the 'Report Problem' button, which is also highlighted with a red rectangular box. Below the navigation bar, there are search filters for 'oor', 'Room', 'Problem Type', and buttons for 'More', 'Clear', 'Filter', and 'Recent'. A 'Group By' dropdown menu is set to 'Status'.

The system will display the **Report Problem** pop up screen, which is broken down into 4 distinct sections: Requestor/Location/Problem/Description

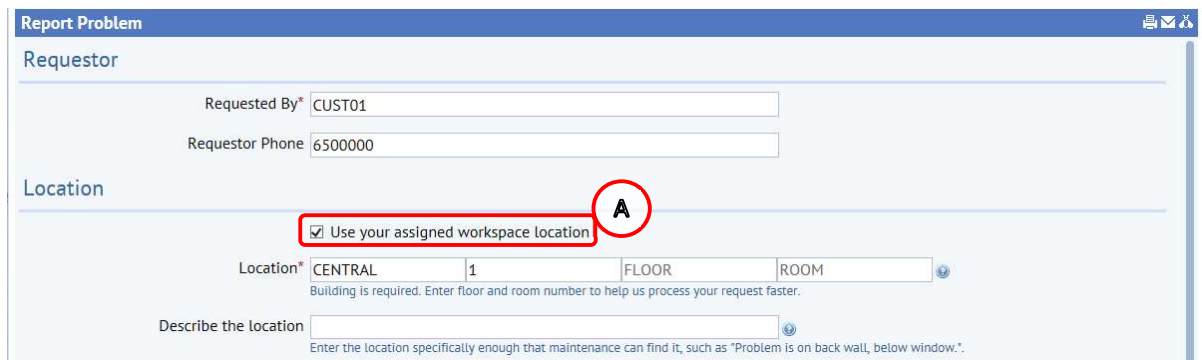


The screenshot shows the 'Report Problem' form. A red circle labeled 'B' highlights the 'Requestor' section, which is also outlined with a red rectangular box. The 'Requestor' section contains fields for 'Requested By*' (CUST01) and 'Requestor Phone' (6500000). Below this is the 'Location' section with a checkbox for 'Use your assigned workspace location', a 'Location*' field (CENTRAL 1 FLOOR ROOM), and a 'Describe the location' field. The 'Problem' section has a 'Type of Problem' dropdown and a 'View All Problem Types' button. The 'Description' section has a 'Description*' text area, a 'Select Description' button, an 'EIT Number' field, and a 'Priority*' section with radio buttons for 'Urgent', '1 day', '1 week', '1 month', and 'No urgency'. At the bottom, there is a 'Workflow' section with 'No Steps Required' and 'Request will be supervised by AFM(AFM)'. The form ends with 'Submit' and 'Cancel' buttons.

1.3.1. Requestor Details

The **(B) Requester section** will be automatically populated with your details as a registered fault reporter. These can be overwritten and changed if required. **(NOTE: You can request your default information to be changed, by contacting the EBIS Users Support desk)** However as you are only able to review Work Requests in your own name it is recommended that this is not changed unless the contact number is incorrect

1.3.2. Location Details



Report Problem

Requestor

Requested By* CUST01

Requestor Phone 6500000

Location

☒ Use your assigned workspace location **A**

Location* CENTRAL 1 FLOOR ROOM

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".

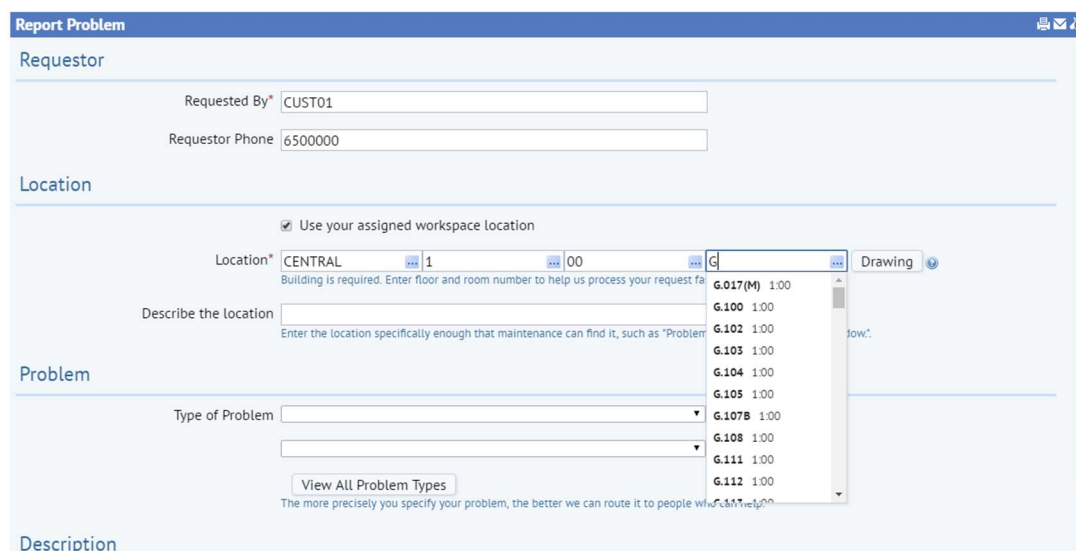
The system is set to recognise your assigned default location and will pre-populate the **Report Problem** pop up screen with the site and building details held.

If you are reporting for a different location or building, untick the **(A) Use Your Assigned Workspace Location** tick-box and enter the correct details.

You will need to ensure the **Site, Building, Floor** and **Room** details are completed when you are raising a new request.

You can add information in 2 different ways:

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



Report Problem

Requestor

Requested By* CUST01

Requestor Phone 6500000

Location

☒ Use your assigned workspace location

Location* CENTRAL 1 00 G Drawing

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

Type of Problem

View All Problem Types

The more precisely you specify your problem, the better we can route it to people who can help.

Description

For example, adding a room. Starting to type "G" will provide a list of all rooms that start with that letter, making it quicker to see and select the option you require.

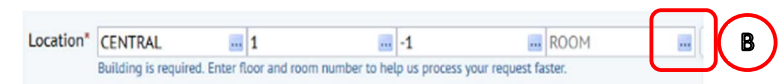
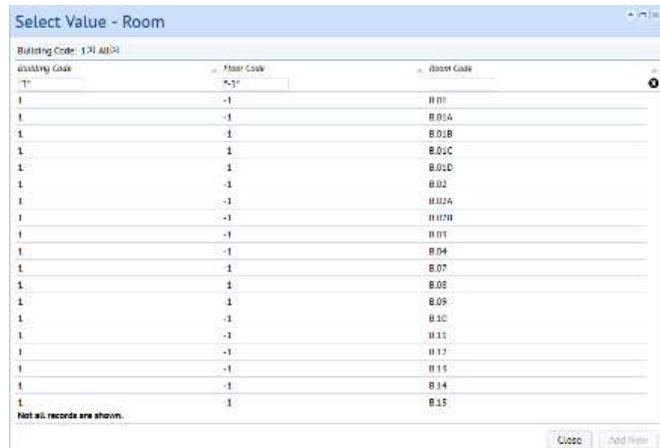
Or

ii) Hovering your mouse over any field will provide an additional **(B) Option**.

Selecting that option will provide a further **Select Value** pop up screen, with details of all available entries for that field, and a soft search box at the top

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 **Report Problem** screen.

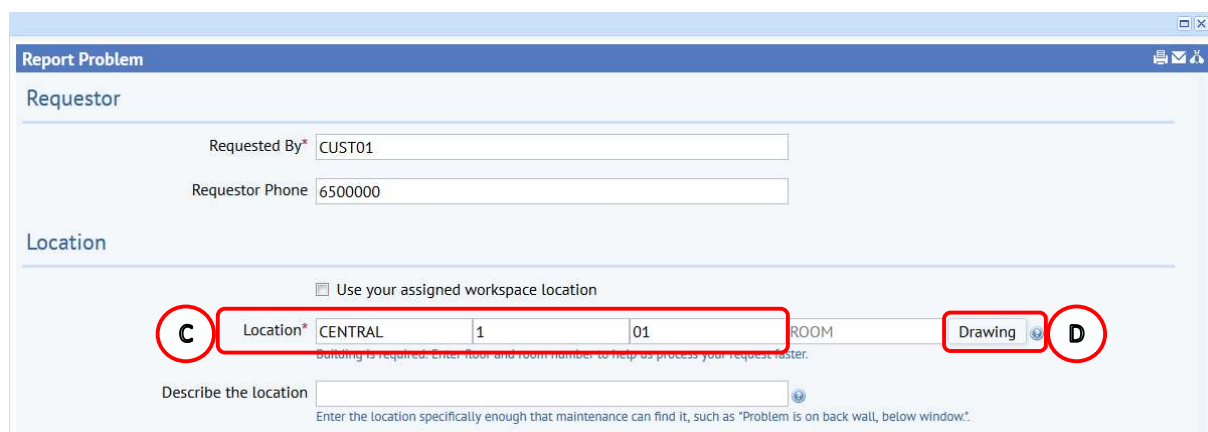
(NOTE: Selecting **Close** will return you to the **Report Problem** screen without copying across any details).

Building Code	Floor Code	Room Code
1	-1	B.01
1	-1	B.01A
1	-1	B.01B
1	-1	B.01C
1	-1	B.01D
1	-1	B.02
1	-1	B.02A
1	-1	B.02B
1	-1	B.04
1	-1	B.07
1	-1	B.08
1	-1	B.09
1	-1	B.10
1	-1	B.11
1	-1	B.12
1	-1	B.13
1	-1	B.14
1	-1	B.15

Alternatively once you have populated the **(C) Site, Building and Floor** details, the system will make a **(D) Drawing** option available.

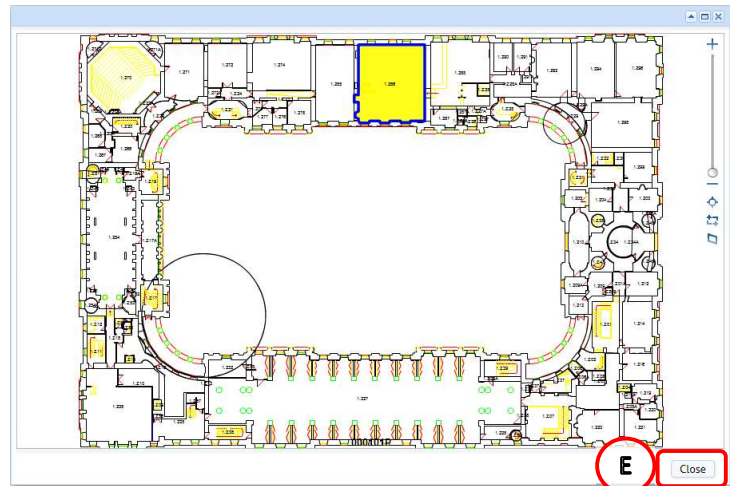
Note: Due to changes with Flash Drive in 2021, floorplans are only viewable if using the Harman browser. This can be downloaded from the software centre if needed.



Selecting the Drawing option will open a new pop up screen displaying relevant floor plan

If you do not know the room reference, clicking on the room code on the drawing will close the drawing and populate the **Report Problem** screen with the selected room details.

If a drawing exists and room code is already inputted, it will allow you to visually confirm the room you require is correct.



If it is, you can select the **(E) Close** option to return to the Report Problem pop up screen.

Use the free text box **(F) Describe the location** option to provide additional location details, such as a specific desk, window or light fitting.

The more precisely you specify the location of the problem, the better our teams can respond.

Report Problem

Requestor

Requested By* CUST01

Requestor Phone 6500000

Location

☐ Use your assigned workspace location

Location* CENTRAL 1 01 1.296 Drawing

(F) Describe the location

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

1.3.3 Problem Details

After completing the location, you will need to add the problem details.

There are 2 ways to add these details.

- i) Selecting the **(A) Type of Problem** option will provide a drop down list of all problem types. The option you select here will determine the list that will be available in the **(B) Field Below**.

Select the most appropriate problem option for both fields.

The screenshot shows the 'Report Problem' form. In the 'Problem' section, there are two dropdown menus. The first dropdown menu is labeled 'A' and has 'Type of Problem' selected. The second dropdown menu is labeled 'B' and is empty. Below these dropdowns is a button labeled 'C' with the text 'View All Problem Types'. A red box highlights the button and the text below it: 'The more precisely you specify your problem, the better we can route it to people who can help.'

(NOTE: See **Appx C** for a full list of the problem type & description)

Or

- ii) Selecting the **(C) View All Problem Type** option will display a **Select Value** pop up screen.

This will show all of the Problem Type/ combinations with soft search options at the top

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 **Report Problem** screen.

(NOTE: selecting the Close option will close the pop up screen without taking any action).

(NOTE: the **CALL OUT** & **FRA** problem types are used by Estates staff only)

The screenshot shows the 'Select Value - Problem Type' pop-up screen. It has a search bar at the top with the text 'Problem Type Code: B[5] C[21] D[5] E[52] F[20] G[14] H[15] J[11] K[4] L[15] P[27] T[1] A[1190]'. Below the search bar is a table with two columns: 'Problem Type Code' and 'Problem Type Description'. The table lists various problem types and their descriptions, such as 'BLINDS/CURTAINS', 'NEW INSTALLATION', 'REPAIR', 'CALL OUT', 'ELECTRICIAN', 'HEATING ENGINEER', 'JOINER', 'PLUMBER', 'CLEANING', 'BROKEN GLASS', 'CARPET SHAMPOO', 'CHALK', 'CIG BINS', 'DEEP CLEAN', 'DOG WASTE', 'ENTRANCE/FIRE EXIT', 'GENERAL CLEAN UP', 'GENERAL LITTER', and 'MISCELLANEOUS'. At the bottom of the screen are 'Close' and 'Add New' buttons.

1.3.4. Description Details

After completing the Location and Problem details, you will need to add descriptions that will help support the work request. This is a free text box, and adding as much detail as possible will help our teams respond to your request.

Enter as many details in the **(A) Description** field as you feel would be relevant to the work request, highlighting any reasons for a high priority response being requested.

If the work is rechargeable to your department, add details of the P&M charge of accounts code string (CoA) to be recharged in the **(A)Description** field.

Rechargeable work is defined as - Non-maintenance work including requests for improvements, something new or additional or associated with equipment owned and managed by colleges, schools, departments that is not part of the building fabric or infrastructure in a building which is not on a rechargeable maintenance model. More information is contained in the Maintenance & Small Projects Service Guide - available at <http://www.estates.ed.ac.uk/helpdesk>

The **(B) Priority** and service level agreements (SLA) available have been pre-agreed.

Depending on the Problem Type selected, you may be given the option to amend the standard SLA.

Select the radio button for the priority you feel the problem requires, please remember to add any reasons for high priority response requests to the **Description** field, as this will allow the Helpdesk to consider the alteration when they approve the work request.

(NOTE: you will be prompted to populate the description field, if you try and submit a new Work Request with this section blank).

The screenshot shows the 'Report Problem' form. The 'Problem' section has 'Type of Problem' set to 'ELECTRICAL' and 'ISOLATIONS'. Below this is a 'View All Problem Types' button and a note: 'The more precisely you specify your problem, the better we can route it to people who can help.' The 'Description' section has a text area labeled 'Description*' containing 'Electrical Problem Description' and a 'Select Description' button. Below this is an 'EIT Number' field. The 'Priority' section has a radio button selection with options: '15 Working days' (selected), '5 Working days', 'Urgent', 'Emergency', and 'By agreed date'. Red circles labeled 'A' and 'B' highlight the 'Description*' field and the 'Priority' section respectively.

(NOTE: See **(C)** example below, the problem type selected is External – Street Furniture. In this instance, the SLA is fixed and cannot be amended by yourself).

Problem

Type of Problem

[View All Problem Types](#)

The more precisely you specify your problem, the better we can route it to people who can help.

Description

Description*

[Select Description](#)

EIT Number

Workflow
 Response required within 5 Days
 Completion required within 90 Days
 Workflow Steps:
 On status of Requested: Edit and Approve is required by HELPDASK OPERATOR
 Request will be dispatched to HELPDASK

[Submit](#) [Add Documents](#) [Cancel](#)

1.3.5. Submitting a new work request

When you have completed all the required details for the new work request, there is a final section at the bottom of the screen and information on what will happen next.

There are three **(A)** buttons –

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

[Submit](#) [Add Documents](#) [Cancel](#)

- 1 **Cancel**
- 2 **Submit a Work Request**
- 3 **Add Documents**

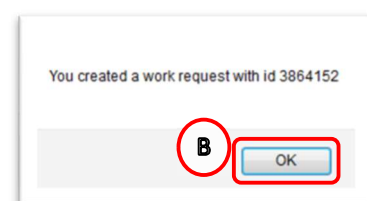
If you no longer wish to proceed with the work request select the **(A) Cancel** button. You will then find yourself returned to the Building Operations Console, without raising a new request.

If you are satisfied with the details entered for the new work request, select the **(A) Submit** option.

The system will display a pop up screen with the work request Id, so you can make a note of this.

Select the **(B) OK** option to continue, and the system will continue to raise the new work order and close the Report Problem pop up screen.

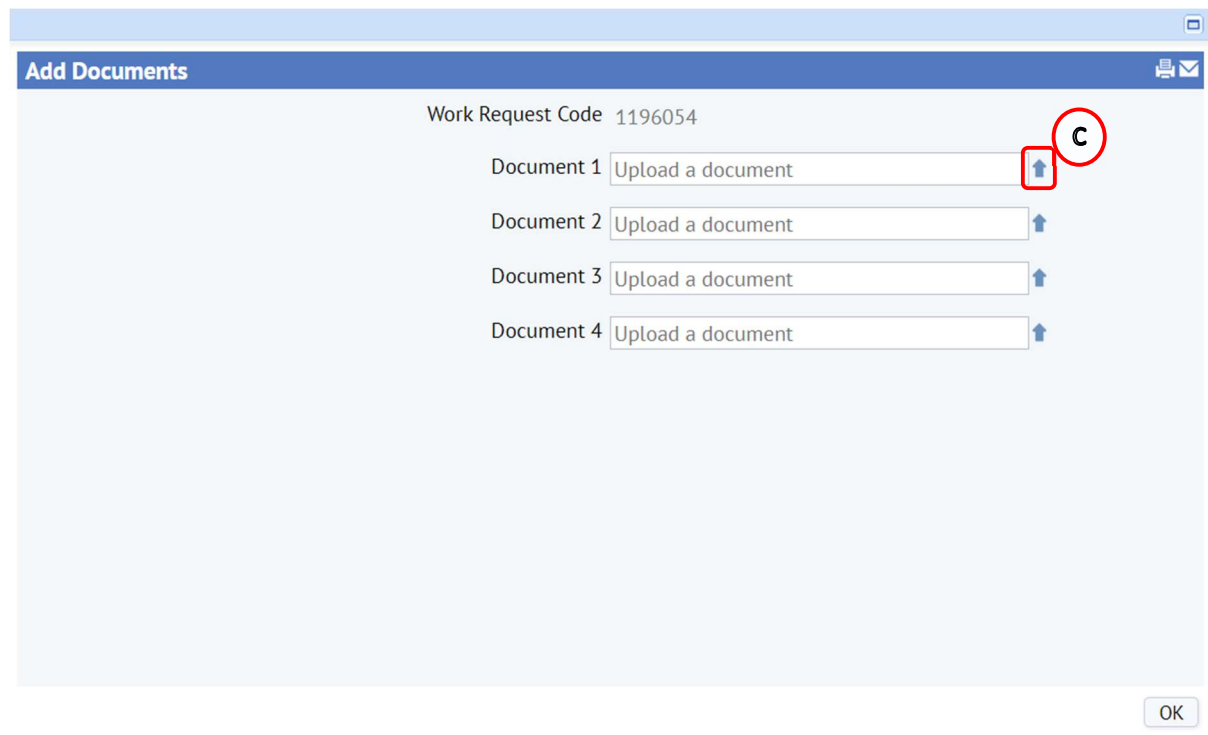
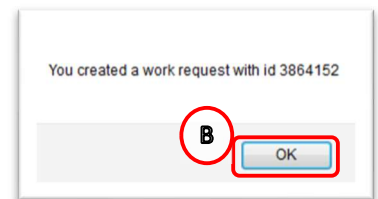
You will then find yourself returned to the Building Operations Console.



If you are satisfied with the details entered for the new work request, but also wish to attach a document to the work request, select **(A) Attached Document** button.

The system will display a pop up screen with the work request Id, so you can make a note of this.

Select the **(B) OK** option to continue, and the system will continue to the **Add Document** pop up screen.



If you wish to upload a document, select the **(C) Upload Arrow** icon

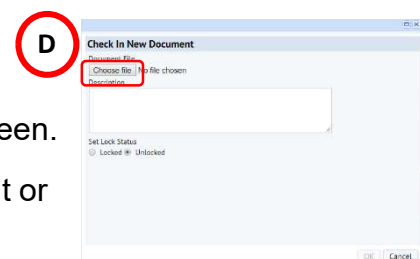
(NOTE: when uploading a document, you will need to have the item saved to a file location you can access)

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

Select the **(D) Choose File** option.

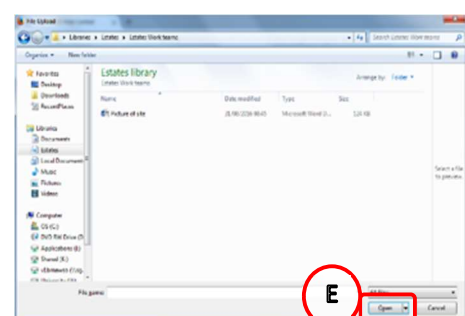
The system will then display the standard **Microsoft File Browser** pop up screen.

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 **Choose File** pop up screen and return you to the **Check in New Document** pop up screen without taking any action)



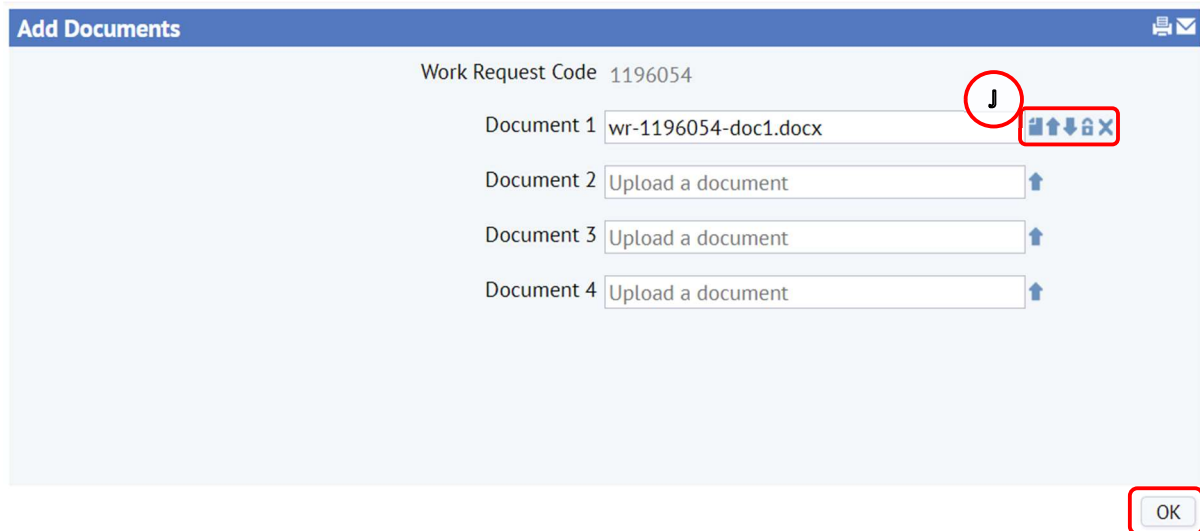
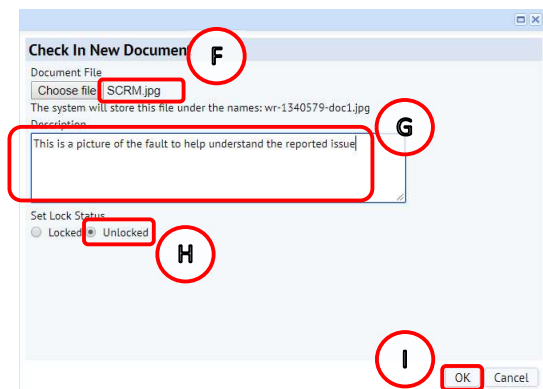
The **Check in New Document** pop up screen will now **(F) display the file selected for attaching** to the work request.

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 **Add Documents** pop up screen.



You can now use the **(J) various icons** to manage the attached document/picture. Hover your mouse over each icon to display each action Show/Check In/Check Out/Lock/Delete.

You can repeat these steps a further three times to add a maximum of four documents/pictures to the work request.

Once you finish attaching documents to the work request select **(K) OK**, and you will be returned to the Buildings Operations Console.

1.4. Reviewing a work request

Once you have submitted a work request, you may wish to monitor its progress.

Navigate to the **Building Operations Console** screen and apply the necessary filter, grouping or screen layout to help you locate an individual or selection of work requests as necessary.

(See **Appx A: Using filter & amending columns in the Building Operation Console Screen** for help on applying filters and grouping).

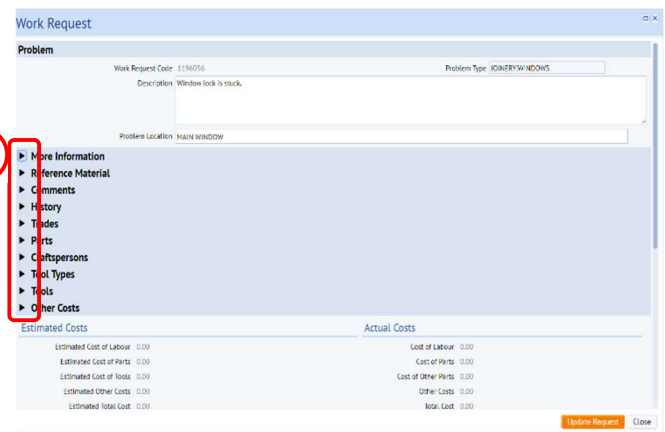
If you would like to know more specific details about an individual work request, click on the **(A) Number** in the work request code column.

0 selected			
<input type="checkbox"/> Work Request Code	<input type="checkbox"/> Problem Type	<input type="checkbox"/> Location	<input type="checkbox"/> Work Desc
▼ Requested <input type="checkbox"/> (8)			
<input type="checkbox"/> 3864356	CALL OUT ELECTRICIAN	1	CPCPCPC
<input type="checkbox"/> 3864355	DECORATION MISC REQUESTS	1--1-B.01C	test broke
<input type="checkbox"/> 3864349	ELECTRICAL LIFT TRAP	1--1-B.Z45	call point
<input type="checkbox"/> 3864334	JOINERY CEILINGS	5003	NT 1L
<input type="checkbox"/> 3864331	CALL OUT HEATING ENGINEER	1	HD3 KD :
<input type="checkbox"/> 3864306	JOINERY WINDOWS	3078-01-1.930317	R3 scena
A <input type="checkbox"/> 3864167	ELECTRICAL ISOLATIONS	1--1-B.01C	Plug sock
<input type="checkbox"/> 3864166	ELECTRICAL ISOLATIONS	1-01-1.286	Electrical
▼ Assigned to Work Order <input type="checkbox"/> (4)			
<input type="checkbox"/> 3864262	HEATING ENGINEER WATER	719-01-1.F06A	R2 scena
<input type="checkbox"/> 3864237	JOINERY KITCHENS	1	CP CP CP
<input type="checkbox"/> 3864227	GLAZING GLAZING REPAIR	113	Glazing T
<input type="checkbox"/> 3864199	ELECTRICAL HEATING	3253	JGHGHG
▼ Issued and In Process <input type="checkbox"/> (7)			
<input type="checkbox"/> 3864335	ELECTRICAL NO HOT WATER	1-04-4.402B	test for d
<input type="checkbox"/> 3864329	PLUMBING METER READINGS	3253-01-01.03.01	R3 scena
<input type="checkbox"/> 3864266	ELECTRICAL FIRE ALARM	1	test assig
<input type="checkbox"/> 3864238	ELECTRICAL NO HOT WATER	640-00-G.0054	R2 scena
<input type="checkbox"/> 3864234	BLINDS/CURTAINS REPAIR	210-02-2.204	R2 scena

The system will display the **Work Request** pop up screen, offering an opportunity to review further details.

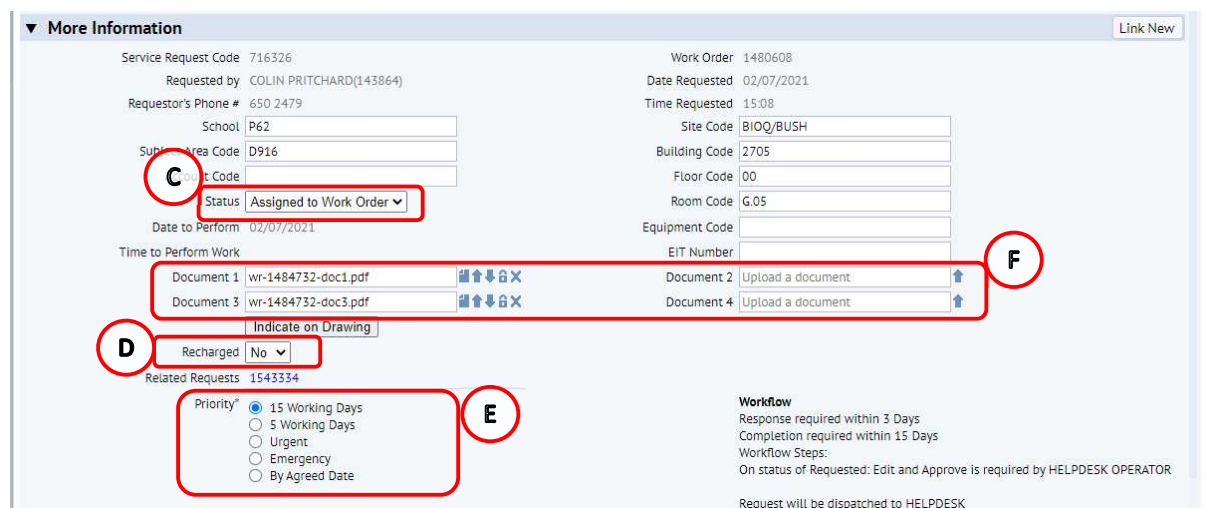
Selecting the **(B) Triangle** next to each section will expand the screen allowing you to review the details.

Key information can be found in the following sections:

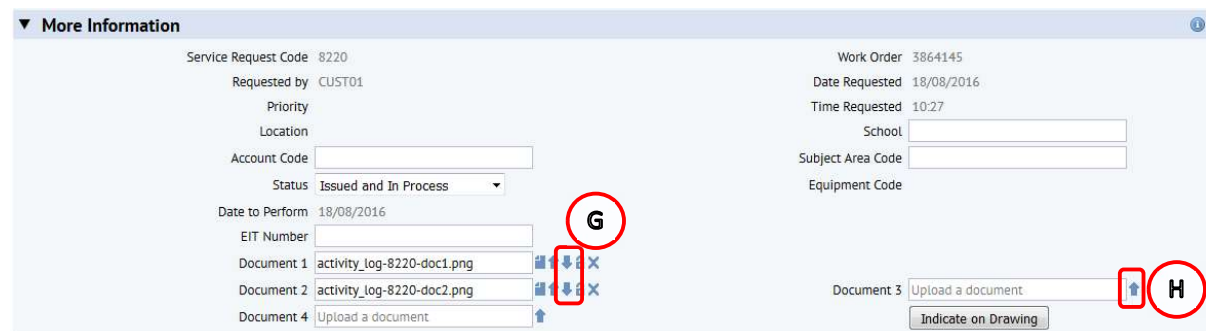


More Information

In the **More Information** section, you can review the parameters of the work request, including **(C) Current Status**, **(D) Recharged** and **(E) Priority**, and add or view any **(F) Documents/Pictures** that have been attached to the work request.



If you want to view an attached document, selecting the **(G) Page Icon** will allow you to view the document in a pop-up screen.

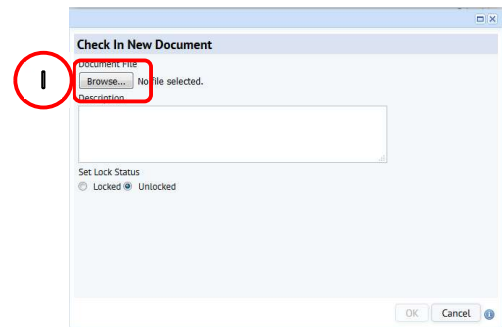


If you wish to upload a new document, find a blank 'Upload A Document' field and select the **(H) Upload Arrow** icon

(**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.

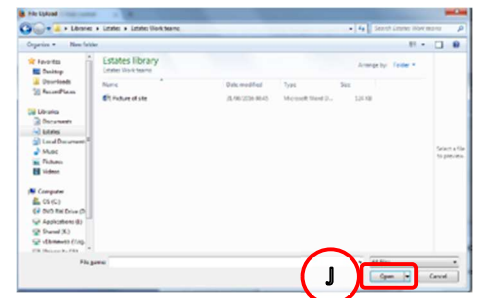
Select the **(I) Browse** option.



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

Select the required file and either double click on it or select the **(J) 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.



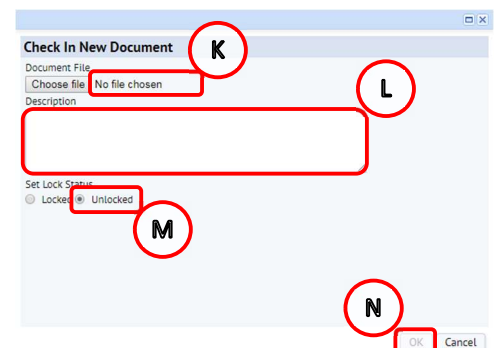
(**NOTE:** selecting the Close option will close the **File Browser** pop up screen and return you to the **Check in New Document** pop up screen without taking any action)

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

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

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

Then select the **(N) 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.

You can also review **(O) Related Work Requests** if applicable.

More Information		Link New	
Service Request Code	424751	Work Order	1195046
Requested by	NEIL THOMPSON(164641)	Date Requested	07/09/2017
Requestor's Phone #		Time Requested	15:58
School		Site Code	HOLYROOD
Subject Area Code		Building Code	1
Account Code		Floor Code	-1
Status	Issued and In Process	Room Code	B.65
Date to Perform	07/09/2017	Equipment Code	
Time to Perform Work		EIT Number	
Document 1	wr-1196051-doc1.jpg	Document 2	Upload a document
Document 3	Upload a document	Document 4	Upload a document
Indicate on Drawing Related Requests 1196046			

If two work requests have been linked, this field will be populated with the work request code belonging to the linked job.

Estates staff can link a work request to a new work request (created by Estates staff), for example should a piece of work move from Maintenance Services to Contract Services. You can now view both requests using this link.

When you select **(N) Related Requests** the **Work Request** pop up screen for the linked request will be displayed.

Comments

In the **Comments** section, you can view any comments left by the Estates team.

(**NOTE:** hover your mouse over the **(P) Comment field** to display all the details entered).

► More Information				
▼ Comments				
Comments ID	Added By	Date Added	Time Added	
168	ATL01	15/09/2016	15:34	P Comments Comments on job progress
► History				
► Trades				

History

In the **History** section, you can view the progression of the work request. Under the **(Q) Comments** heading you can view any information left by Estates staff where the work request has deviated from the normal workflow e.g. the priority has changed or the job has moved work team.

(See Section **Appx B: Work Request Life Cycle** for details of a work request life cycle).

► More Information					Add ⓘ	
► Comments					Add ⓘ	
▼ History					Add ⓘ	
Step Responded By	On	Workflow Step	Status	Step Status After	Comments	
	15/09/2016 13:48	Basic	Requested	None		Q
HD01	15/09/2016 15:37	Edit and Approve	Requested	Approved	This work is rechargeable - eIT required	
	15/09/2016 15:37	Basic	Approved	None		
	15/09/2016 15:37	Basic	Assigned to Work Order	None		
► Trades					Add ⓘ	
► Parts					Add ⓘ	

Craftsperson

In the **Craftsperson** section, you can view details of who carried out the work, the amount of time recorded, and any **(R) Comments** left by them.

▼ Craftspersons												R
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	11:53	0.00	0.00	0.00	0.00					Active	
GARY GRAHAM	11/09/2017	12:11	0.00	0.50	0.00	0.00	11/09/2017	13:23		13:55	Active	New fuse required
► Tool Types												

Update Work Request

Once a Work Request reaches the **Issued and In Process** step, the Update Work Request section becomes available, where you can view details of the **(S) Repair** actually undertaken and any additional notes **(T) Craftsperson Notes**

Estimated Costs		Actual Costs	
Estimated Cost of Labour	0.00	Cost of Labour	15.00
Estimated Cost of Parts	0.00	Cost of Parts	0.00
Estimated Cost of Tools	0.00	Cost of Other Parts	0.00
Estimated Other Costs	0.00	Other Costs	0.00
Estimated Total Cost	0.00	Total Cost	15.00

Update Work Request

Equipment Down (Hours)

0.00

Current Equip. meter reading

0.00

Craftspersons Notes

needs follow up after call out

S

Cause Code

MATRL_22

Repair Type

RENEW SILICONE SEAL SHOWER TRA

Update Request

Close

Rejected Work Request

When you have raised a work request, it will arrive with the Estates Helpdesk staff for review. If significant details are missing or need clarification the helpdesk technicians will firstly try to contact you to discuss. If we are unable to contact you then the WR may be rejected. If they opt to reject a work request, it will be displayed in your console under the status step **(V) Rejected**. To resubmit the request you must first apply filter to show **(U) Pending Steps**, this will give access to the actions Buttons **(W) & (X)**.

U

Show Pending Steps

Site

Building

Floor

Problem Type

More

Clear

Filter

Recent

Group By Status

V

0 selected

Building Name

Work Request Code

Problem Type

Location

Work Description

Work Team Code

Assigned To

Due Date

No. of

Rep

Rejected (1/1)

INFIRMARY ST,09-11

1196057

LIFTS|MINOR FAULT

305-01-1.08

The lift car is making a strange noise

02/10/2017

0

Requested (0/2)

W

X

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

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

Update Work Request 1196057

Problem

Work Request Code: 1196057 Problem Type: LIFTS/IMINOR FAULT

Description: The lift car is making a strange noise

Problem Location:

More Information

History

Step Responded By	On	Workflow Step	Status	Step Status After	Comments
CPRITCH3	11/09/2017 14:22	Basic	Requested	None	
EMULLAN	11/09/2017 14:26	Edit and Approve	Requested	Rejected	
COLIN PRITCHARD(143864)	Pending	Basic	Rejected	None	This is a duplicate work request

B Update Request Close **A** Submit **Y**

You can view the Helpdesk team **(Y) Comments** by opening the **(Z) History** section.

You can add further detail to the location and description fields, and resubmit the work request to Estates Helpdesk team by selecting the **(A) Submit** option. The work request will then arrive back with the Estates Helpdesk and follow the normal approval process.

(NOTE: It is recommended that you call the Helpdesk team to flag that the request is being resubmitted)

If you solely wish to record an update to the work request before cancelling the job, then select the **(B) Update Request** option. This will save any update made and return to the Building Operations Console.

(NOTE: This will not resubmit the request back to Estates)

Work Request Raised in Error

If you have raised a work request in error, you can now cancel the request from the Building Operations Console. This option is only available when at the **Requested** or **Approved** status, awaiting issuing to Craftsperson.

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

0 selected

Building Name	Work Request Code	Problem Type	Location	Work Description	Work Team Code	Assigned To	Due Date	No. of	Repair Type	
Requested (2/2)										
INFIRMARY ST,09-11	1196056	JOINERY/WINDOWS	305-01-1.10	Window lock is stuck.			02/10/2017	0		Cancel
INFIRMARY ST,09-11	1196054	ELECTRICAL/EMERGENCY LIGHTING	305	Test			02/10/2017	0		Cancel

C

Select **(C) Cancel** to cancel and archive the request.

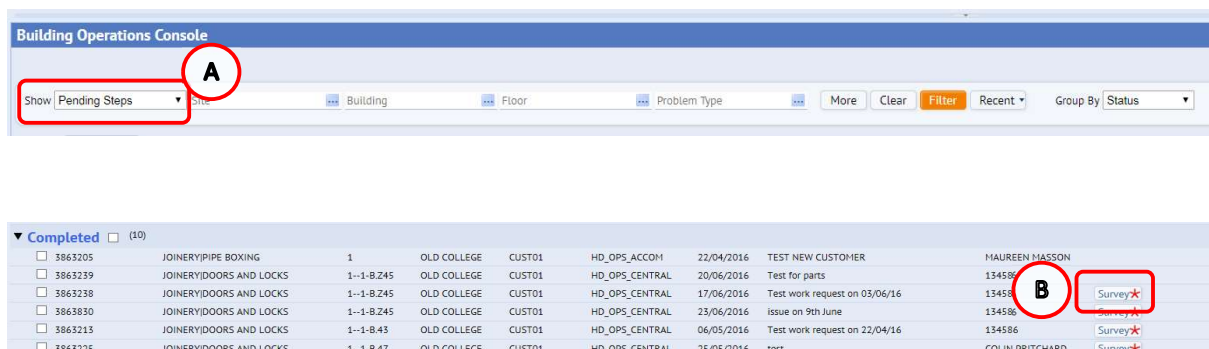
1.5. Customer Survey

When your work requests status is set to Complete, the system will send you an e-mail asking you to complete a survey.

These are important to Estates, as they allow us to monitor the levels of service we provide, and take steps where a satisfactory level has not been achieved.

To complete a survey, please **DO NOT** reply to the e-mail notification, instead navigate to the **Building Operations Console**. Apply filter to display **(A) Pending Steps** which will display all work requests requiring a survey and will have the relevant option on the right.

Select the **(B) Survey** option.



Building Operations Console

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

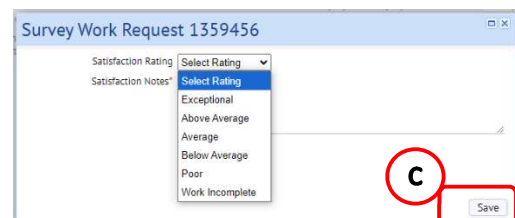
Completed	(10)								
<input type="checkbox"/>	3863205	JOINERY/PIPE BOXING	1	OLD COLLEGE	CUST01	HD_OPS_ACCOM	22/04/2016	TEST NEW CUSTOMER	MAUREEN MASSON
<input type="checkbox"/>	3863239	JOINERY/DOORS AND LOCKS	1--1-B.245	OLD COLLEGE	CUST01	HD_OPS_CENTRAL	20/06/2016	Test for parts	134586 (B)
<input type="checkbox"/>	3863238	JOINERY/DOORS AND LOCKS	1--1-B.245	OLD COLLEGE	CUST01	HD_OPS_CENTRAL	17/06/2016	Test work request on 03/06/16	134586
<input type="checkbox"/>	3863830	JOINERY/DOORS AND LOCKS	1--1-B.245	OLD COLLEGE	CUST01	HD_OPS_CENTRAL	23/06/2016	Issue on 9th June	134586
<input type="checkbox"/>	3863213	JOINERY/DOORS AND LOCKS	1--1-B.43	OLD COLLEGE	CUST01	HD_OPS_CENTRAL	06/05/2016	Test work request on 22/04/16	134586
<input type="checkbox"/>	3863225	JOINERY/DOORS AND LOCKS	1--1-B.47	OLD COLLEGE	CUST01	HD_OPS_CENTRAL	25/05/2016	test	COLIN PRITCHARD

The system will display a Survey pop up screen.

Select the relevant Satisfaction Rating and enter any relevant Satisfaction Notes to help support the survey.

Select the **(C) Save** option.

The system will record the survey details and close the pop up screen.



Survey Work Request 1359456

Satisfaction Rating: Select Rating

Satisfaction Notes: Select Rating

- Exceptional
- Above Average
- Average
- Below Average
- Poor
- Work Incomplete

(C) Save

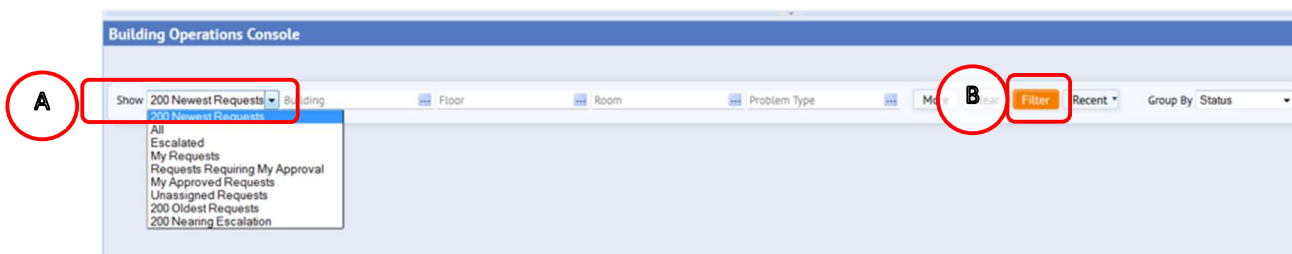
APPENDIX A**1.6 Appx A: Using filter & amending columns - Building Operation Console Screen****1.6.1 Using filters**

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 bring back relevant information and allow the system to perform quickly.

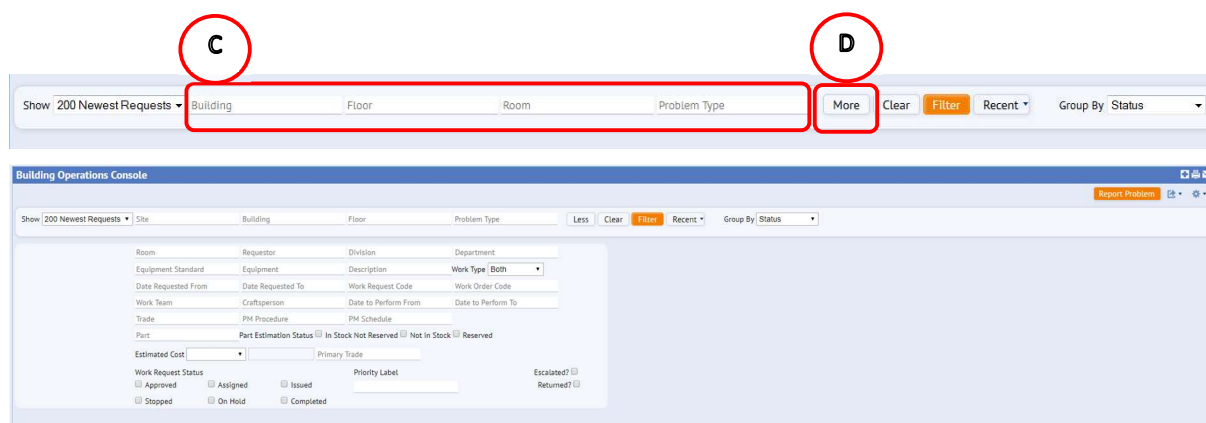
The **(A) Show** option will provide a drop down list of generic searches, such as by status or Work Request age.

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



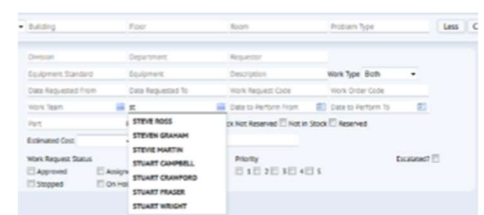
There are a range of filters by **(C) Location & Problem Type**

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



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

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



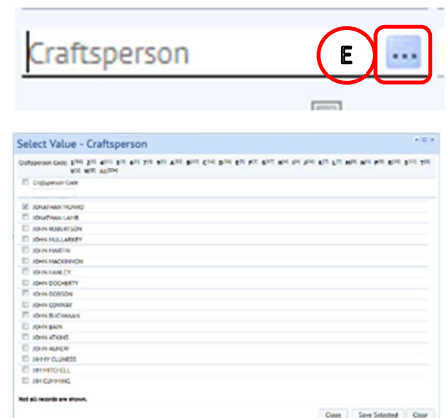
Or

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

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

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

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



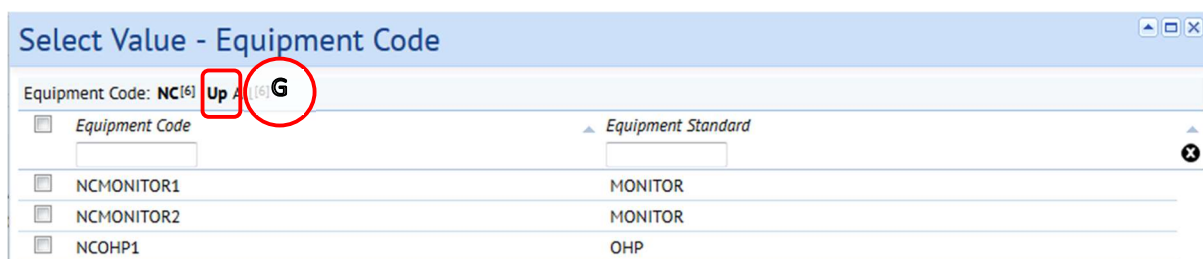
(NOTE: Selecting **Close** will return you to the previous screen without copying across any details. Selecting **Clear** will remove any options ticked for selection and default to the 200 Newest Work Requests).

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

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



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



1.6.2 Using the Group By Option

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

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

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

Building Operations Console

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	Work Order
Assigned to Work Order (2)				
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
Issued and In Process (5)				
3864149	JOINERY/FIXTURES & FITTINGS	1-02-2.243B Coming away from the wall	02/09/2016	3864137
3864145	ELECTRICAL/ POWER	1--1-8.01 Plug socket not working	02/09/2016	3864136
3864142	FIRE SAFETY/EVAC SIGNAGE	1--1-8.01 Electrical Problem Description	01/09/2016	3864134
Stopped (1)				
3864140	JOINERY/DOORS AND LOCKS	305-00 check door	31/08/2016	3864132
Completed (2)				
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.

Building Operations Console

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

0 selected

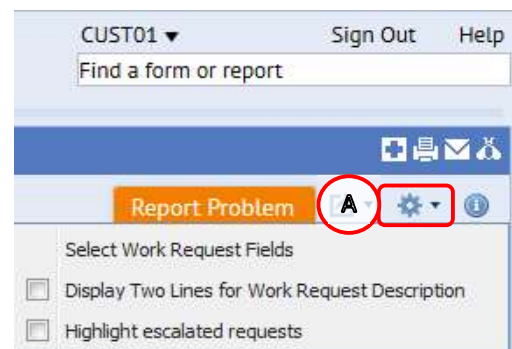
Work Request Code	Location	Work Description	Due Date	Supervisor	Status
BLINDS/CURTAINS/NEW INSTALLATION (1)					
3864151	201-02-2.10	test to see if leaving UYAWL tick box ticked, u...	16/12/2016		Requested
CALL OUT/PLUMBER (1)					
3864153	1--1-8.07	billy bob requested to attend 2000hrs	15/09/2016		Issued and In Process
CLEANING/BLOOD (1)					
3864150	1	Test Work Request Primary Trade	19/08/2016	ATL01	Completed
CLEANING/CARPET SHAMPOO (2)					
3864155	1-00-6.103	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--1-8.01C	White paint please	19/12/2016		Requested
ELECTRICAL/ POWER (2)					
3864146	1--1-8.02A	Power out	02/09/2016		Requested
3864145	1--1-8.01	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)					

1.6.3 Amending Columns - Building Operations Console

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

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

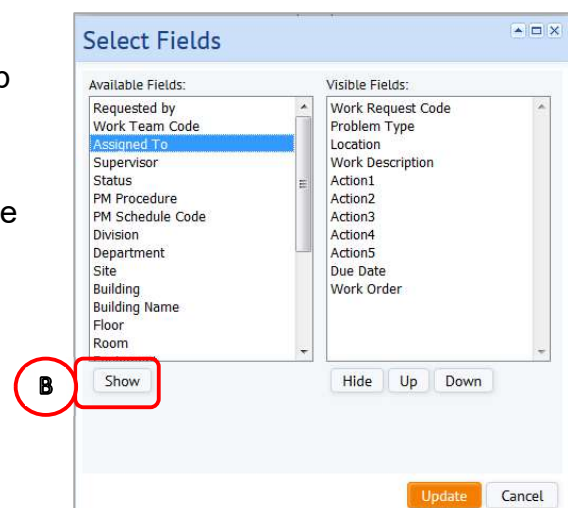
Selecting the **(A) Edit** icon will display an option list, choose the **Select Work Request Fields** option.



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

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

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

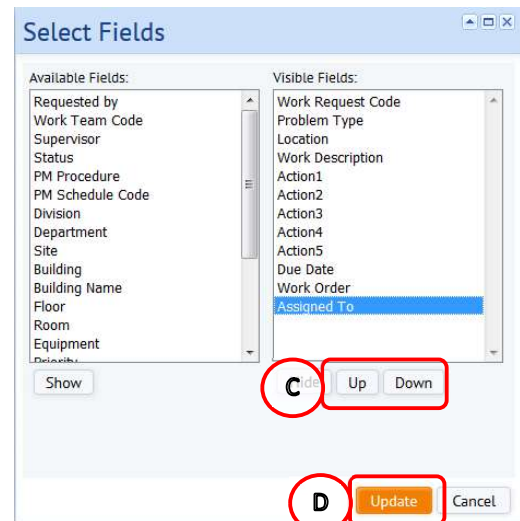


The selected item will move from the left hand column into the right hand column.

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

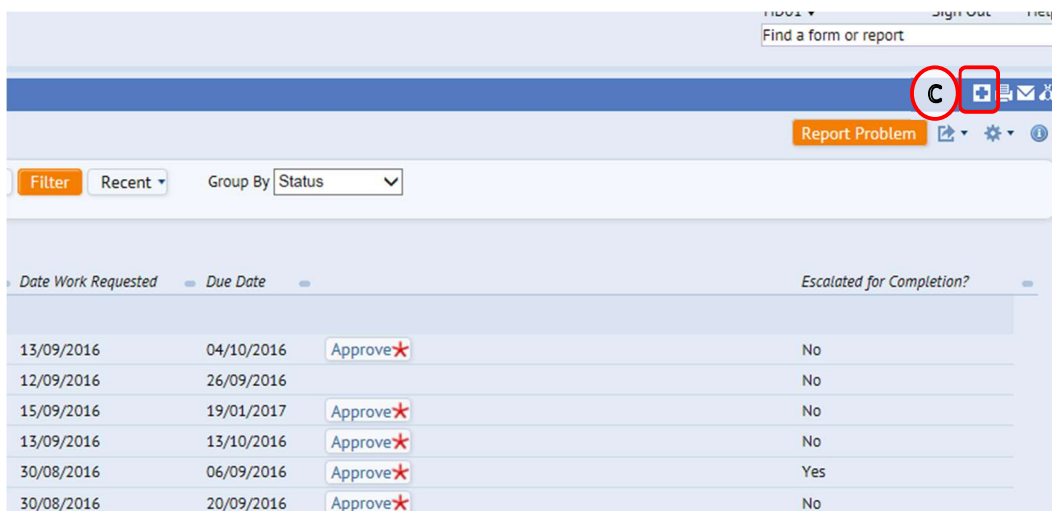
To make something appear further to the left on the Building Operations Console screen, move it higher up the list. Alternatively, to appear further to the right, move it lower down the list.

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



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

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



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**1.7 Appx B: Work Request Life Cycle**

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

There are 5 key statuses, with an additional optional status



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

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

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

APPENDIX C**1.8 Appx C: Problem Type/ Description**

The following list provides details of each problem type and problem type description for use in Section **1.3.3 Problem Details**.

Problem Type Code	Problem Type Description
ELECTRICAL	ELECTRICAL
ELECTRICAL	LIGHTING
ELECTRICAL	FIRE ALARM
ELECTRICAL	LIGHTING
ELECTRICAL	POWER
ELECTRICAL	SOCKETS/DATA/SWITCHES
ELECTRICAL	SMELL OF BURNING
ELECTRICAL	WIRING/TRUNKING
ELECTRICAL	HEATING
ELECTRICAL	NO HOT WATER
ELECTRICAL	SHOWERS
ELECTRICAL	EMERGENCY LIGHTING
ELECTRICAL	ELECTRICAL EQUIPMENT
ELECTRICAL	EXTRACTOR FAN
ELECTRICAL	HAND/HAIR DRYERS
ELECTRICAL	FUME HOODS
ELECTRICAL	LIFT TRAP
ELECTRICAL	LIFT ISOLATION
ELECTRICAL	WATER AFFECTING
ELECTRICAL	DEMO
ELECTRICAL	GENERATORS
ELECTRICAL	PLANT ROOM CHECKS
ELECTRICAL	ISOLATIONS
ELECTRICAL	AUTOMATIC DOORS
ELECTRICAL	TV AERIAL
ELECTRICAL	PAT TEST
ELECTRICAL	ASSIST CONTRACTOR/CONSULTANT/OTHER TRADE
ELECTRICAL	CCTV/ALARMS
ELECTRICAL	ELECTRIC CAR CHARGES
LIFTS	LIFTS
LIFTS	REPORT MINOR FAULT
LIFTS	BREAKDOWN
LIFTS	LIGHT OUT
LIFTS	DAMAGE INSIDE LIFT
LIFTS	DROPPED INTO LIFT SHAFT
LIFTS	PASSENGER TRAP
HEATING	HEATING
HEATING	HEATING/VENT
HEATING	CALORIFIERS
HEATING	BOILER
HEATING	RADIATORS

HEATING	WATER
HEATING	METER READINGS
HEATING	HEATING TIMES
HEATING	CHP
HEATING	ATTEND DEMO
HEATING	ASSIST CONTRACTOR/CONSULTANT/OTHER TRADE
HEATING	CLEAN AND TIDY PLANT ROOM STORE
HEATING	BMS
HEATING	GAS
HEATING	FUME CUPBOARDS
PLUMBING	PLUMBING
PLUMBING	TAPS
PLUMBING	SHOWERS
PLUMBING	WASH BASINS/SINKS
PLUMBING	TOILETS
PLUMBING	BATHS
PLUMBING	STORAGE TANKS
PLUMBING	NEW INSTALLATION
PLUMBING	HEATING/RADIATORS
PLUMBING	INVESTIGATE SMELL
PLUMBING	FLOOD
PLUMBING	EXTERNAL DRAINAGE
PLUMBING	ATTEND DEMO
PLUMBING	METER READINGS
PLUMBING	INVESTIGATE DAMP
PLUMBING	WATER
JOINERY	JOINERY
JOINERY	DOORS & LOCKS
JOINERY	WINDOWS
JOINERY	FLOORS/SKIRTING/STAIRS
JOINERY	SHELVING/NOTICE BOARDS
JOINERY	FURNITURE REPAIRS
JOINERY	FIXTURES & FITTINGS
JOINERY	PIPE BOXING
JOINERY	CEILINGS
JOINERY	KITCHENS
JOINERY	SIGNAGE
GLAZING	GLAZING
GLAZING	GLAZING REPAIR
GLAZING	GLAZING FILM
GLAZING	MIRROR
GLAZING	HEALTH & SAFETY
GLAZING	SUPPLY GLAZING
KEYS	KEYS
KEYS	SUPPLY NEW KEYS
KEYS	SUPPLY NEW LOCK/CYLINDER
PROJECT	PROJECT
PROJECT	PROJECT REQUEST>£50K

PROJECT	PROJECT REQUEST<£50K
PEST CONTROL	PEST CONTROL
PEST CONTROL	RODENTS/MICE
PEST CONTROL	BIRDS/NESTS
PEST CONTROL	WASPS
PEST CONTROL	ANTS
PEST CONTROL	SQUIRRELS
PEST CONTROL	INSECTS
PEST CONTROL	OTHER
LANDSCAPE	LANDSCAPE
LANDSCAPE	WEEDS
LANDSCAPE	TREE DAMAGE
LANDSCAPE	SNOW/GRITTING
LANDSCAPE	TREES IN HIGH WINDS
LANDSCAPE	SLABS/FOOTPATH
LANDSCAPE	ROAD SURFACE
GRAFFITI	GRAFFITI
GRAFFITI	STICKERS/POSTERS
GRAFFITI	SPRAY
GRAFFITI	CHALK
GRAFFITI	PAINT
FURNITURE	FURNITURE
FURNITURE	UPHOLSTERY
FURNITURE	BROKEN LOCK
FURNITURE	MISSING PART
FURNITURE	REPAIR
FURNITURE	MISC REQUEST
EXTERNAL	EXTERNAL
EXTERNAL	ROOFS
EXTERNAL	HEALTH & SAFETY
EXTERNAL	WALLS
EXTERNAL	SLABS/SURFACE
EXTERNAL	STREET FURNITURE
EXTERNAL	PIPES
DECORATION	DECORATION
DECORATION	PAINTING REQUEST
DECORATION	DAMAGED AREA/WALL
DECORATION	MISC REQUESTS
DECORATION	EXTERNAL
BLINDS/CURTAINS	BLINDS/CURTAINS
BLINDS/CURTAINS	REPAIR
BLINDS/CURTAINS	NEW INSTALLATION
EQUIP/SPECIAL KIT	EQUIP/SPECIAL KIT
EQUIP/SPECIAL KIT	SMART BOARDS
EQUIP/SPECIAL KIT	SPEED LANES
EQUIP/SPECIAL KIT	WATER COOLERS

EQUIP/SPECIAL KIT	HYDROBOILS
EQUIP/SPECIAL KIT	CLOCKS
EQUIP/SPECIAL KIT	TANOY SYSTEMS
EQUIP/SPECIAL KIT	MISCELLANEOUS
EQUIP/SPECIAL KIT	CATERING EQUIPMENT
FLOORING	FLOORING
FLOORING	CARPET
FLOORING	LINO
FLOORING	DOOR MATS
FLOORING	TIMBER FLOORING
FLOORING	QUARY TILES
FLOORING	STAIR TREDS
FLOORING	H&S ISSIUE
EXTERNAL DOORS	EXTERNAL DOORS
EXTERNAL DOORS	AUTO DOORS
EXTERNAL DOORS	ROLLER DOORS
EXTERNAL DOORS	SPEICALIST LOCKS
EXTERNAL DOORS	GATES
EXTERNAL DOORS	BARRIERS
EXTERNAL DOORS	UNSECURE
EXTERNAL DOORS	MISCELLANEOUS
CLEANING	CLEANING
CLEANING	WINDOWS
CLEANING	CIG BINS
CLEANING	VENTS
CLEANING	GENERAL LITTER
CLEANING	CHALK
CLEANING	POSTERS
CLEANING	ENTRANCE/FIRE EXIT
CLEANING	MISC SPILAGE
CLEANING	GENERAL CLEAN UP
CLEANING	BROKEN GLASS
CLEANING	DEEP CLEAN
CLEANING	SUPPLY NEW DISPENSERS
CLEANING	BLOOD
CLEANING	NEEDLES
CLEANING	DOG WASTE
CLEANING	CARPET SHAMPOO

CLEANING	MISCELLANEOUS
FIRE SAFETY	FIRE SAFETY
FIRE SAFETY	EVAC SIGNAGE
FIRE SAFETY	FIRE BLANKET
FIRE SAFETY	EXTINGUISHER