# User Guide

# Web Central v2024.04

# Customer

Report a Fault/Request Small Works, Review a Work Request, Complete Customer Survey

#### 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 <u>ebisusers@ed.ac.uk</u> in the first instance.

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:

https://uedinburgh.iwmsapp.com/archibus/

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

www.estates.ed.ac.uk/estates-helpdesk-services

#### Accessibility

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

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#### **Document Version Control**

Date	Owner	Version	Update
May 2025	Eileen Mullan	V2.0	Initial Version for Archibus 2024.04

#### Purpose

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

- Raising a Work Request
- Adding requestor details, location, problem and description details
- Reviewing a Work Request
- Completing a Customer Survey

#### 1.1. Accessing the Maintenance Console

After logging onto the WebCentral system, you will see the following screen (menu option may vary depending on your access type), select the **(A) Corrective Maintenance** option which will allow you to choose **(B) Maintenance Console**.



When you see the following screen, you will see a list of all open and recently completed Work Request which you have created. The Maintenance Console page groups Work Requests by status.

≡ Archibus ⊌eptura		Alintenance Console
,○ Search	>	Work Requests 🕹 Locate 🖄 Export 🗘 Options Report Problem
☆ Favorites	>	Q. Search by code, type, procedure, equipment, description, location, person Quick Filters 🗸 😤 Filters Clear Group by: Status >
Space Inventory  Service Desk	> >	Work         I         Actions         Building         I         Problem Type         I         Work Description         I         Priority         I         Location         I         Date to         I         Assigned         I         Contract Reference         I         Recharge CoA         I           Request         Name         PM Procedure         Comments         I         Perform         to         Number(5) (CRN)         I         Recharge CoA         I           Due Date         Work         Nor         Due Date         Work         I<
Corrective Maintenance		Team Team
		Assigned to Work Order (4) >
		□ Issued and In Process (6) >
		On Hold for Parts (3) >
		Completed (12) >
	_	

(See <u>Appx A</u> to review the filters and column setup for the Maintenance Console page. Setting a filter to return a limited number of work requests will enhance the speed of the system)

(See <u>Appx B</u> to understand the lifecycle of a work request)

The page will load with the status bands collapsed, but indicating how many requests are at each status by the number shown in brackets.



The following options will help to navigate the page:

The **Expand / collapse >** icon to the right of the titles to hide or show information of work requests under each grouping (work status).

There are **Navigation sliders** to the right and bottom of the screen to scroll to information not on view

Expanding each section will show up to 25 WRs initially. If there are more than 25, you will be asked if you want to load more requests into the status band by the **(C) More, View Next 25** button.

Work Requ Q. Search Work Reque Reque Assig	uests they code, type, p est A uested (5) > gned to Work 612	pracedure, equipment, de actions Order (4) ~	scription, location, person Building Name 1	Quick Filters × == Problem Type : PM Procedure	Hiters Deer Group by Status * Work Description \$	Priority 1	Q I Location I Name)	Locate 🚖 Export 1 Date to Perform 1 Due Date	Options Re Assigned to Work Team	Contract ( (CRN)
C. Search Reque Reque Assig	th by code, type, p est A uested (5) > gned to Work 612	eracedure, equipment, de ectons Order (4) v	scription, location, person Building Name 1	Quick Filters ~ == Problem Type PM Procedure	Hiters Clear Group by Status * Work Description Comments	Priority \$	Location 1 Name)	Date to Perform 1 Due Date	Assigned to Work Team	Contract ( (CRN)
Work Reque Reque Assig	est A uested (5) > gned to Work	order (4) v	Building Name 1	Problem Type : PM Procedure	Work Description 1	Priority 1	Location 1 (Name)	Date to Perform 1 Due Date	Assigned to Work Team	Contract ( (CRN)
<ul><li>Requi</li><li>Assig</li><li>17486</li></ul>	uested (5) > gned to Work	Order (4) ~								
Assig	gned to Work	Order (4) ~								
17486	612	8								
			OLD COLLEGE	UAT SLA SET UP   UAT SLA SET UP	Routine work Failure not having any operational	4 ROUTINE	OLD COLLEGE 04-4.21	Fri 11/04/2025 39 days left	HELPDESK	
17486	611	0	OLD COLLEGE	UAT SLA SET UP JUAT SLA SET UP	Priority work Failure causing only moderate disrup tion to operations	3 - PRIORITY	OLD COLLEGE 05-5.72	Fri 11/04/2025 11 days left	HELPDESK	
17486	610	0	OLD COLLEGE	UAT SLA SET UP UAT SLA SET UP	Urgent Work Failure causing serious disruption to operations	2-URGENT	OLD COLLEGE 03M-03M.213	Fri 11/04/2025 11 days left	HELPDESK	
17486	609	0	OLD COLLEGE	UAT SLA SET UP LUAT SLA SET UP	Emergency Work Requiring immediate response to pr event severe damage or injury	1 - EMERGENCY	OLD COLLEGE 01-1.210	Fri 11/04/2025 11 days left	HELPDESK	
Issue	ed and In Proc	cess (6) ~								
17486	613		OLD COLLEGE	UAT SLA SET UP   UAT SLA SET UP	By Agreed Date work Changeable work/project, or fu ture planning for a specific date	S - BY AGREED DATE	OLD COLLEGE 03-3.424	Fri 11/04/2025 88 days left	HELPDESK	
C										

Wor	k Requests	enance	Consol	e at description l	ocation person	
	Date Work Requested	‡ Building	Building Name	1 Work Request	Location (Name)	1
	03/01/2025	2702	QUEENS MED RES INST, LF	1744321	QUEENS MED RES INST, LF 03-W3.13	

#### 1.2. Raising A New Work Request

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

B Maintenance Console							<b>88</b> 1	E UNBURGH	0	<b>*</b> @
Vork Requests -						♥ Loo	ate 🛆 Expor	t 🛱 Opto	ns Repor	t Proble
Q Search by code, type, procedure, equipment, description, location, person	Quick Filters ~	式 Filters (2)	Clear	Group by: Status *						

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

#### 1.2.1. Requester Details

The **(B) Requester** section will be automatically populated with your name and contact number held in the system.

The telephone number can be overwritten and changed if required. (NOTE: You can request your default information to be changed, by contacting <u>ebisusers@ed.ac.uk</u>)

Report Problem									Ľ
Requestor					В				
Requested By*	UAT USER UAT USER								
Requestor Phone	650 6666								
Location									
	Use your assigned v	workspace location							
Location	HOLYROOD	1	FLOOR	ROOM		Мар			
	Enter in as much of th	e location information a	s you know. After se	lecting a floor, y	ou may click	the Drawi	ng button to	select the roor	m from a 1
Describe the location									
	Enter the location spe	cifically enough that mai	ntenance can find it	, such as "Prob	lem is on bac	k wall, bel	ow window.".		
Problem									
Type of Problem				~					
				~					
	View All Problem Ty	pes							
	The more precisely yo	u specify your problem,	the better we can ro	ute it to people	who can he	p.			

#### 1.2.2. Location Details

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 code held for you.

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.

Report Problem						
Requestor						
Requested By*	UAT USER					
	UAT USER					
Requestor Phone	650 6665					
Location	Use your assign	ed workspace location				
Location	HOLYROOD	1	FLOOR	ROOM	Мар	
	Enter in as much o	the location informati	on as you know. After	selecting a floor, you ma	y click the Drawing button to s	select the room from a floor plan drawing.
Describe the location						
	Enter the location s	pecifically enough that	t maintenance can fin	d it, such as "Problem is o	on back wall, below window.".	

You will need to ensure the **Site**, **Building**, **Floor** and **Room** details are completed when you are raising a new request (**NOTE**: adding a valid building code will automatically backfill the site).

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.

Location									
		Use your assigned	workspace location						
	Location	HOLYROOD	1	00	G	Drawing	Мар		
	Describe the location	Enter in as much of th	he location information	n as you know. After selectin	G.100 - OLD COLLEGE	1-00	) button to select the room from a floor plan drawing.		
Describ					G.102 - OLD COLLEGE				
		Enter the location specifically enough that maintenance can find it, suc			G.103 - OLD COLLEGE	1 - 00	/ window.".		
The sector					G.104 - OLD COLLEGE	1-00			
Problem					G.105 - OLD COLLEGE	1-00			
Туг	pe of Problem	~			G 108 - OLD COLLEGE	LEGE 1-00			
				~	G.111 - OLD COLLEGE	1-00			
		11			G.113 - OLD COLLEGE	1 - 00			
		View All Problem Types The more precisely you specify your problem, the better we can route i			G.114 - OLD COLLEGE	1 - 00	*		

For example, adding a building code, starting to type "1" will provide a list of all building codes that start with that, 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.** 

	🗹 Use your assig	ned w	orkspace location				$\square$	B
ocation	HOLYROOD		1	00		ROOM		
	Enter in as much	of the	location information as	s you know. At	fter selecting	g a floor, you n	ev click the	Dr

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 populating any details).

Building Code: 11 A	11								
Building Code	$\uparrow$	Building Name	$\uparrow$	Floor Code	$\uparrow$	Room Code	$\uparrow$	Room Type	
°1°				"00"					×
1		OLD COLLEGE		00		G.100		01	
1		OLD COLLEGE		00		G.102		01	
1		OLD COLLEGE		00		G.103		06	
1		OLD COLLEGE		00		G.104		01	
1		OLD COLLEGE		00		G.105		01	
1		OLD COLLEGE		00		G.107B		10	
1		OLD COLLEGE		00		G.108		10	
1		OLD COLLEGE		00		G.111		06	
1		OLD COLLEGE		00		G.113		06	
1		OLD COLLEGE		00		G.114		06	
1		OLD COLLEGE		00		G.115		06	
1		OLD COLLEGE		00		G.116		06	
1		OLD COLLEGE		00		G.117		06	

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

Report Problem						
Requestor						
Requested By*	UAT USER					
	UAT USER					
Requestor Phone	650 6665					
Location	Use your assigne	d workspace location		~		D
Location	HOLYROOD	1	00	ROOM	Drawing	Мар
	Enter in as much of	the location information	<del>on as you know. After sele</del>	eting a floor, you may o	lick the Drawing	outton to select the room from a floor plan drawing.
Describe the location	Enter the location s	pecifically enough that	maintenance can find it,	such as "Problem is on	back wall, below	window.".

Selecting the Drawing option will open a new pop-up screen displaying relevant floor plan allowing you to select directly from the floor plan. Clicking on the room code in 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, clicking on the drawing option 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.



The free text box **(F) Describe the location** option can be used to provide additional location details, such as a specific desk, window or light fitting, although this should also be captured in the description.

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

Report Problem								
Requestor								
Requested By*	UAT USER							
	UAT USER							
Requestor Phone	650 6665							
Location								
	Use your assigned v	vorkspace location						
Location	HOLYROOD	1	00	ROOM	Drawing	Мар		
	Enter in as much of the	location information a	s you know. After selecti	ng a floor, you may click t	the Drawing	button to select	t the room from a floor	r plan drawing.
Describe the location								
	Enter the location spec	ifically enough that ma	intenance can find it, sue	ch as "Problem is on back	wall, below	window.".		

#### 1.2.3 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 problem types. The option you select here will determine the list of options available in the **(B) Field Below.** 

Select the most appropriate problem option for both fields.

Problem	
	Type of Problem
	Ň Ň Ň Ň Ň Ň Ň Ň Ň Ň Ň Ň Ň Ň Ň Ň Ň Ň Ň
	View All Problem Types C 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 ProblemType 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.

Problem Type Code: B 3 C 32 D 5 E 65 F 22 G 20 H 24 J 2	1 K7 L18 P37 R4 S	7 U 2 All 267	
Problem Type Code	$\uparrow$	Problem Type Description	
			×
3LINDS/CURTAINS		BLINDS/CURTAINS	
SLINDS/CURTAINS   NEW INSTALLATION		NEW INSTALLATION	
SLINDS/CURTAINS   REPAIR		REPAIR	
CALL OUT		CALL OUT	
CALL OUT   ELECTRICIAN		ELECTRICIAN	
CALL OUT   HEATING ENGINEER		HEATING ENGINEER	
CALL OUT   JOINER		JOINER	
ALL OUT   MANAGEMENT		MANAGEMENT	
CALL OUT   PLUMBER		PLUMBER	
LEANING		CLEANING	
CLEANING   BLOOD		BLOOD	
LEANING BROKEN GLASS		BROKEN GLASS	
and the second of a line			

(**NOTE**: selecting the Close option will close the Select Value screen without taking any action).

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

#### 1.2.4 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.

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 choose from a selection of priorities (see <u>Appx C</u>).

Select the radio button for the priority you feel best suits the problem being reported, please remember to add reasons in the **Description** field if opting for anything other than Routine Priority. All work request will be reviewed and triaged by Estates Helpdesk where they may amend this choice to ensure consistent service delivery, the reasons noted will form part of that triage.

(**NOTE**: the description field is mandatory, you will be unable to submit a new Work Request with this section blank).

Description	Description*	
B	Priority*	Select Description
)		Workflow Response required within 10 Days Completion required within 6 Months Workflow Steps: On status of Requested: Edit and Approve is required by HELPDESK OPERATOR Request will be dispatched to HELPDESK
	Recharge CoA	Submit Add Documents Cancel

(**NOTE:** See (**C**) **example below**, the problem type selected is External – Street Furniture. In this instance, the SLA is fixed and you are unable to choose a priority).



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, or 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 <a href="http://www.estates.ed.ac.uk/helpdesk">http://www.estates.ed.ac.uk/helpdesk</a>

#### 1.2.5 Submitting A 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.

Recharge CoA				
٦	Submit	Add Documents	Cancel	

There are three (A) buttons -

- 1 Cancel
- 2 Add Documents
- 3 Submit a Work Request
- 1 If you no longer wish to proceed with the work request select the **(A) Cancel** button. You will then find yourself returned to the Maintenance Console, without raising a new request.
- 2 If you also wish to attach a document/picture to the work request, select (A) Attached **Document** button and the system will continue to the Add Document pop up screen.

From here select the (C) Upload Arrow icon

		1
Document 1	<i>Drag-and-drop your file or click upload ic</i>	
Document 2	Drag-and-drop your file or click upload ic	C
Document 3	Drag-and-drop your file or click upload ic	5
Document 4	Drag-and-drop your file or click upload ic	

(**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.

	~
Check In New Document	
Document Sile	
Choose File I to file and	
Description	
Test Lock Pathor	
Locked      Unlocked	

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.

		×2
Document 1	activity_log-978086-doc1.jpg	副事业 B X
Document 2	Drag-and-drop your file or click upload ic	1 J
Document 3	Drag-and-drop your file or click upload ic	1
Document 4	Drag-and-drop your file or click upload ic	t
		$\sim$
		(к)

Organica + Nam la	like .				H - D B
* Favoritzs Dostop Dostop Dostop Dostop Disconfluon Disconfluon	Estates library Lester Roo tarre Nors Et House of ste	Determedified (1.16-236-8645	Type Microsoft Week ()	Average by Fer State 125.48	**
Consument Consu					Select + 1 to preve
Computer Computer CS(C) CP DVD THE Drive (D) CP Denvel (K)					

Check In New Document	2 <sup>2</sup> >
Document File	
Choose File Picture.jpg The system will store this file under the names: activity_li	og-978086-doc
Description	
this is a picture to help understand the issue being repo	prted
Set Lock Status	le la
Set Lock Status C Locked  Unlocked	i.
Set Lock Status O Locked  Unlocked	
Set Lock Status	

You can now use the **various icons (J)** 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.

3 Once you are satisfied with the details entered for the new work request and have added all documents/pictures, 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 Maintenance Console and your new work request should show at Requested status.



#### 1.3 Reviewing a work request

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

Navigate to the **Maintenance Console** screen and apply any filters, grouping or screen layout needed to help you locate an individual or selection of work requests as necessary.

(See <u>Appx A</u>: Using filter & amending columns in the Maintenance 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.

ß	Maint	tenance Console						G THE UNIVERSITY	0 6 @
Wor	k Request	S					• Locate	🗄 Export 🗳 Options	Report Problem
0	Q Search by co	ode, type, procedure, equipment, o	description, location, person	Quick Filters 👻 😅 Filters	Clear Group by: Status *				
	Work Request	1 Actions	Building 1 Name	Problem Type 1 PM Procedure	Work Description \$\$ Comments	Priority 1	Location (Name)	1 Date to Perform 1 Due Date	Assigned to 3 Work Team
	Requester	d (7) >							
	Assigned	to Work Order (4) ~							
	1748612	8	OLD COLLEGE	UAT SLA SET UP UAT SLA SET UP	Routine work Failure not having any operational Estates Staff Comments	4 - ROUTINE	OLD COLLEGE 04-4.Z1	Fri 11/04/2025 39 days left	HELPDESK
A	174/611	8	OLD COLLEGE	UAT SLA SET UP UAT SLA SET UP	Priority work Fallure causing only moderate disrup tion to operations	3 - PRIORITY	OLD COLLEGE 05-5.Z2	Fri 11/04/2025 11 days left	HELPDESK
	1748610	8	OLD COLLEGE	UAT SLA SET UP   UAT SLA SET UP	Urgent Work Failure causing serious disruption to operations	2-URGENT	OLD COLLEGE 00M-00M.Z13	Fri 11/04/2025 14 days left	MS_HOLYROOD
	1748609	$\otimes$	OLD COLLEGE	UAT SLA SET UP JUAT SLA SET UP	Emergency Work Requiring immediate response to pr event severe damage or injury	1 - EMERGENCY	OLD COLLEGE 01-1.210	Fri 11/04/2025 14 days left	MS_HOLYROOD
	Issued an	d In Process (6) >							
	On Hold f	or Parts (3) >							
	Complete	d (12) >							

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

Selecting the **(B) Icon** next to each section will expand/collapse the section allowing you to review the details.

This screen contains three sections:

#### Overview:

🤌 Work Request		THE UNIVERSITY (7) To (2)
Back to Requests Work Request: 1748613 By Agreed Date work		
Overview Documents and Activity Additional	Details	Expand All
✓ Location, Problem and Request Details		
Description		
By Agreed Date work Chargeable work/project, or future planning for a specific date		
Location	Problem	Request Details
Site Code	Priority	Requested By:
HOLYROOD	1 - EMERGENCY	UAT USER B
HOLYROOD	2 - URGENT 3 - PRIORITY	UNIUSER
Building Code	G 4-ROUTINE	Linked Work Requests
1	5 - BY AGREED DATE	1748631
OLD COLLEGE	Chabur	Requestor's Phone #
Floor Code	Irrued and In Process	650 6666
03		Date Baruested
	Problem Type	11/04/2025 14:56
Room Code	UAT SLA SET UP   UAT SLA SET UP	
9,494		D D .

Shows details of the work request captured on the **Report a Problem** screen including location, problem and requester details. You can also review (**B**) **Related Work Requests** if applicable. 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 create a link work request to generate a new work request, for example where a piece of work escalates from Maintenance Services to Contract Services. You can now view both requests using this link.

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

#### **Documents and Activity:**

🖉 Work Request							THE UNIVERSITY	0 to 0
K Back to Requests								
Work Request: 1748612	Assigned to Work Order							
Routine work								
Coverview Documents an	nd Activity Additional Details							Expand All
✓ Request Documents								
Document 1	wr-1748612-doc1.jpg	il t # B X	Document 2	Drag-and-drop your file of	r click upload icon	+	-	
Document 3	Drag-and-drop your file or click upload icon	t	Floor Plan Redline	Drag-and-drop your file of	r click upload icon	1 Indicate on Drawi	<sup>ng</sup> D	
✓ Additional Documents and	Activity						Add Comments	Add Document
cuments and comments added	d here can be viewed on Archibus OnSite.							
Cument A	Activity		‡ D	ate and Time Added	1			
D	EMULLAN] Approval Approved		1	/04/2025 14:55				
0	UATUSER] changed the status to Requested		1	/04/2025 14:55				
D	EMULLAN] changed the status to Approved		1	/04/2025 14:58			$\frown$	
0	SYSTEM] changed the status to Assigned to Work Or	rder	1	/04/2025 14:58			<u>    (</u> F )	
D	EMULLAN] Estates Staff Comments		1	/04/2025 15:15		۵.		

(C)Request Documents is where you can review any documents/pictures attached to the work request. These could be uploaded by the requester or Estates staff carrying out the work. To open a document, click on the Show Document i cicon. If you wish to upload a new document, select the (D) Add Documents option and follow steps described in 1.2.5

(E) Additional Documents and Activity shows a chronological list of actions and comments. You can also add (D) Add Comments, once added you will be able to (F) Delete/Edit your own comments only. While Estates staff will be able to view these comments adding them does not give any push notification so we would encourage you to continue to contact Estates Helpdesk with any changes made including to highlight any escalation to severity or impact of faults.

#### Additional Details:

	🤌 Work Request					G THE UNIVERSITY C	D 6	0			
	Back to Requests Work Request: 1748612 Assigned to Work Order Routine work										
(	Overview Documents and Activity	Additional Details					Expa	nd All			
	✓ Work Request History										
	Step Responded By	On	Workflow Step	Status	Step Status After	Comments					
	UAT USER	11/04/2025 14:55	Basic	Requested	None						
	EMULLAN	11/04/2025 14:57	Edit and Approve	Requested	Approved						
	EILEEN MULLAN(164640)	11/04/2025 14:58	Basic	Approved	None						
	SYSTEM	11/04/2025 14:58	Basic	Assigned to Work Order	None						
	ILEEN MULLAN(164640)	11/04/2025 15:15	Comments	Assigned to Work Order	None	Estates Staff Comments					
ľ	> Account Information										

**(G) Work Request History** shows a chronological list similar to Additional Documents and Activity described above but is limited to the actions taken to progress the work request and the comments added at each step.

**(H) Account Information** relates to various cost information captured against the work request.

#### 1.4 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 **(A) Rejected.** 

Work 1 Actions Request	Building Name 🇘	Problem Type PM Procedure	t Work Description 1 Comments
Rejected (1) ~			
1748632 C B	OLD COLLEGE	UAT SLA SET UP UAT SLA SET UP	Routine work Failure not having any operational C incomplete location, please update floor and room
Requested (7) >			

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

If selecting Update the Work Request screen will appear

Overview	Documents and Activity Additional Details								Expand All			
∨ Request	✓ Request Documents											
	Document 1 wr-1767247-doc1.jpg Document 3 Drag-and-drop your file or click upload icon	il±∓⊖X ±	Document 2	Drag-and-drop your file o Drag-and-drop your file o	or click upload icon or click upload icon	1 1	Indicate on Drawing					
✓ Addition	V Additional Documents and Activity Add Documents											
Documents an	nd comments added here can be viewed on Archibus OnSite.											
Document	Activity		1 Dat	te and Time Added	I				1			
	[CUSTOMER] changed the status to Requested		18/	04/2025 18:08								
	[EMULLAN] Approval Rejected rejected		18/	04/2025 18:08								
	[CUSTOMER] changed the status to Rejected		21/	04/2025 09:03								

You can view the Helpdesk team (D) Comments by opening the Documents and Activity section.

You can add further detail to the fields including location and description, and resubmit the work request to Estates Helpdesk team by selecting the **(E) Submit** options. The work

Back to Requests		
Work Request: 1767247 (Rejected)		
Priority work		
Overview Documents and Activity Addi	tional Details	Expand All
✓ Location. Problem and Request Details		
Description		
Priority work		
Failure causing only moderate disruption to operations		
		ĥ
location	Problem	Request Details
Location -	rionen	request secons
Site Code	Priority	Requested By:
HOLYROOD	5 - By Agreed Date	CUSTOMER
HOLYROOD	4 - Routine	A CUSTOMER
	③ 3 - Priority	
Building Code	2 - Urgent	Requestor's Phone #
1	1 - Emergency	650 4567
OLD COLLEGE	Factor	Date Requested
Floor Code	Status	18/04/2025 18:08
02	Rejected Y	
	Problem Type	Date to Perform
Room Code	ELECTRICAL LIGHTING	18/04/2025 18:08
7 245	ELECTRICALITION	(E)
		Cancel Save Submit

request will then arrive back with the Estates Helpdesk and follow the normal approval process.

If you solely wish to record an update to the work request before cancelling the job, then select the **(E) Save** option. This will save any update made and return to the Maintenance Console where you can cancel.

#### 1.5 Cancelling a Work Request Raised in Error

If you have raised a work request in error, you can cancel the request from the Maintenance Console. This option is only available when at the **Requested or Assigned to Work Order** status, awaiting issuing to Craftsperson.

Work \$ Request	Actions	Building Name	1	Problem Type PM Procedure	1	Work Description Comments	1	Priority	ţ	Location (Name)
Rejected (1) >										
Requested (7) >										
Assigned to Wor	k Order (4) ~									
1748612	8	OLD COLLEGE		UAT SLA SET UP UAT SLA SET U	JP	Routine work Failure not having any operational Estates Staff Comments		4 - ROUTINE		OLD COLLEGE 04-4.Z1
1748611	⊗ C	OLD COLLEGE		UAT SLA SET UP   UAT SLA SET U	JP	Priority work Failure causing only moderate disruption to operations	2	3 - PRIORITY		OLD COLLEGE 05-5.Z2

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

If you wish to cancel a Work Request which is at Issued and In Process or one of the On Hold status's please contact <u>Estates.Heldpesk@ed.ac.uk</u> with details and we will arrange work to be Stopped.

#### 1.6 Customer Survey

When the work requests status is set to Complete and has been verified for any additional costs, the system will send you an e-mail from <u>noreply-archibus@ed.ac.uk</u> asking you to complete a **Customer Survey**.

These are important to Estates, as they allow us to monitor the level of service we provide, and take steps to improve.

To complete a survey, please **DO NOT** reply to the e-mail notification, instead either click on the link provided or navigate to the **Maintenance Console**.

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

Completed (12) $\vee$		
1745129	OLD COLLEGE	UAT SLA SET UP UAT SLA SET UP
1745071	OLD COLLEGE	HEATING ENGINEER HEATING/VENT
1745070	OLD COLLEGE	FLOORING CARPET

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	1745129	×^ ×
Satisfaction Rating	No Rating 🗸	
Satisfaction Notes*	No Rating	
	Exceptional	
	Above Average	le le
	Average	
	Below Average C	
	Poor	
		Save

#### **APPENDIX A**

#### 2.0. Appx A: Navigating the Maintenance Console Screen

#### 2.1 Maintenance Console Screen

The Maintenance Console screen is split into three main sections:

- (A) Side bar navigation panel on the left, from which you select the content you wish to see. The content displays in the workspace on the right.
- (B) View Header, from left to right, the components of the view header are
  - Application icon and View Name When Archibus loads the task you selected from sidebar, it displays the view title here
  - UoE Logo
  - Archibus User Help icon
  - Favourites Adds or removes the current view to or from the Favourites menu
  - User Menu This menu holds My Profile information
- (C)Workspace When you make a selection from the sidebar, Archibus displays the content in this space



The sidebar navigation panel is the area on the left side of the screen which holds a list of views. These will vary depending on the role and access type you are assigned.

Selecting a menu category will open up a list of views available to select.

	e	uts		Archibus	≡
☆ Favorites       >       E       Labor Schieduler         □ Space Inventory       >       all Reports Central          □ Preventive       >       BM Wiever          □ Corrective       all Maintenance Report Builder           ○ Corrective        Maintenance Survey Report          Browze all        Supervisor       >         □ On Demand Work Reports       >        Operational Reports       >		Maintenance Console	>	Search	Q
Space Inventory  Preventive  Preventive  Corrective	nt description	Labor Scheduler	>	Favorites	슈
Preventive      Maintenance Report Builder     Corrective      Corrective      Power      Maintenance Report Builder     Maintenance Survey Report     Browse all     Supervisor      On Demand Work Reports      Operational Reports      Operational Reports      Supervisor      Super	in occorrector	Reports Central	>	Space Inventory	
Corrective Maintenance Mainte	Subject \$ Area	BIM Viewer	>	Preventive	8
Corrective Corrective Maintenance Survey Report Browse all Supervisor On Demand Work Reports Operational Reports >		Maintenance Report Builder		Maintenance	
Browse all Supervisor On Demand Work Reports Operational Reports >		Maintenance Survey Report	٢	Maintenance	8
Supervisor > On Demand Work Reports > Operational Reports >		e all			
On Demand Work Reports >     Operational Reports >	,	Supervisor			
Operational Reports >	>	On Demand Work Reports			
	·	Operational Reports			
Management Reports >	>	Management Reports			

The work space will display a list of work requests available to you in line with your access role.

- Customer: will see only work requests they have created
- Work Team Supervisor: will see work requests assigned to work teams they are part of, as well as any requests they have created
- Helpdesk: will see work requests regardless of who created them or which work team they have been assigned to.

The list will be Grouped by Status as a default, but this can be changed using the drop down (2.3).

Groups can be collapsed or opened by selecting the  $\sum$  icon.

Wo	k Requests		♥ Locate 🏠 Export 🗘 Options Report Problem
	Search by code, type, procedure, equipment, description, location, person	Quick Filters * 😴 Filters Clear Group by: Status *	
	Building I Building I School I Subject I Floor I Latitude I Name Area	Longitude I Time I Work I Location I Actions On Request (Name) Hold	Problem I Work I Priority Equipment I Date to I Assigned I Superv Type Description Code Perform to PM Comments Equipment Due Work Procedure Standard Date Team
	Requested (54) >		
	Assigned to Work Order (9183) >		
	Issued and In Process (1602) >		
	Stopped (1) > •		
	On Hold for Access (107) >		
	On Hold for Labor (200) >		
	On Hold for Parts (325) >		
	Completed (61) >		
	Closed (6935) >		

## 2.1 Using filters

There are a range of filter options available to you, through the Maintenance Console.

You may know the exact work request or characteristics of work requests (such as location, problem type, or equipment) that you want to find. In these cases, you can directly type into the **(A) Search Bar**, use key words/numbers to search for work requests which match the value you enter in the box. The search is not case-sensitive.

Maintenance Console     Work Requests	B C Quick Filters V 😂 Fil
Q Search by code, type, procedure, equipment, description, location, p	Quick Filters V S Filters My Requests
	Requests Requiring 1
	My Approved Reques

Use the **(B) Quick Filters** button to display a list of commonly accessed pre-defined filters. The "All" entry displays all work requests; no filter is active. This option also displays a list of recently used filters.



There are a range of advanced filters by which can be accessed by selecting the **(C) Filters** option. This presents a side panel with the various fields by which you can filter.

Expand each panel (by selecting the > icon) to see its fields and complete the desired fields with your search criteria. You can combine as many criteria as you need, however you cannot combine Quick Filters and Advanced Filters together. Once you have your filter settings use the **(D) Action** buttons

- If you are happy with your filter settings click **Apply** option, and the Console page will show the Work Requests that fall within the selected criteria.
- If you are completing the filter and want to start over, click **Clear** to remove your current entries.
- If you decide you do not want to work with the Filters panel, click **Cancel**.

If you need to adjust the filter, click Filters again. The Filters side panel opens and displays your current settings, which you can adjust as necessary.

When entering your desired criteria, you can select information for the different fields in 2 different ways:

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

Or

ii) Hovering your mouse over either field will provide an additional **(E) Option.** In the case of Date Filters this will be a (F) Calendar icon.

Page	24	of	35	

Filters	Apply Clear Cancel
✓ Gen	eral
	Work Type
	Both 🗸
	Problem Type
	Priority
	Work Request Code
	Wark Order Code
	work order code
	Description
> Equ	ipment & PM Details
>	
	ation & Organization
> Peo	ple
> Req	uest Status
> Date	e Range



Problem Type	E	
V Date Range	F	
Date Requested From	Y	
		Ö

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.

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

Selecting one of the **(G) 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.

Select Value - Problem Type	cical droup by, status
✓ 1 selected	G
Problem Type Code: B3 C32 D5 E65 F22 G20 H24 J21 K7 L18 P37	R4 S7 U2 All 267
Problem Type Code	↑ Problem Type Description
	×

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

Select Value - Problem Type		
✓ 1 selected	H	
Problem Type Code: PE	8 PL24 PR5 Up All3	

Sele	ct Value - Problem Type		~*×
v 1 se	lected		
Probi	em Type Code: B + C = D + E = F = G = H = J = K + L = P = R + S + U	D ALCO	_
	Problem Type Code	Problem Type Description	^
	ILIN25CURANS	RUNDS/CURDANS	
	IN INDUCTION IN A INVESTIGATION	NEW INVERTIGATION	_
	IN THE SECURITARIES   IN TARK	(d.)Walk	_ 1
	CALLOUT	CALLOUT	
	CALLOUT ELECTRICIAN	ELECTRICIAN	
Previ	CALLOUT HEATING FIGURER NS Page 1 073 NMT	HEATING PRICINEER	
		Okse Save Selected Clear	

#### 2.2Using 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.

You will be able to group the records by a variety of options including the Work Request Status, Location or by Problem Type.

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

Maintenance Console	
Work Requests	A)
Q. Search by code, type, procedure, equipment, description, location, person Quick Filters 🗸 😤 Filters Clear	Group by: Status ¥
Date Work I Building I Building I Work I Location I Actions Problem I Work I P Requested Name Request (Name) Type Description PM Comments Procedure	<ul> <li>✓ Status</li> <li>Site</li> <li>Building</li> <li>Te</li> </ul>
Requested (48) >	Problem Type
Assigned to Work Order (9389) >	Work Order
□ Issued and In Process (1603) >	Work Team
Stopped (1) >	Priority None
On Hold for Access (107) >	

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

88	Maintenance Console	
Wo	rk Requests	♥ Lo
	Q. Search by code, type, procedure, equipment, description, location, person Quick Filters 🗸 😂 Filters Clear Group by: Problem Type 🗸	
	Date Work 1       Building 1       Building 1       Work 1       Location 1       Actions       Problem 1       Work 1       Priority 1       Date to 1       Assigned 1       Contract 1       Recharge         Requested       Name       Request       (Name)       Problem 1       Work 1       Priority 1       Date to 1       Assigned 1       Contract 1       Recharge         PM       Comments       Due       Work       Number(s)       Procedure       Date       Team (CRN)	1
	BLINDS/CURTAINS   NEW INSTALLATION (19) >	
	BLINDS/CURTAINS   REPAIR (5) >	
	CALL OUT ELECTRICIAN (16) >	
	CALL OUT   HEATING ENGINEER (41) >	

#### 2.3 Amending Columns - Maintenances 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) Options** 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 lefthand column into the right-hand column.

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

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

Select Fields	u <sup>2</sup> ×
Available Fields:	Visible Fields:
Date to Perform Due Date Date Vork Completed Equipment Code Equipment Standard Escalated for Completion? PM Procedure PM Schedule Code Problem Type Requested by Room Site	Vork Request Location (Name) Actions Problem Type/PM Procedure Work Description/Comments Priority Date to Perform/Due Info Assign to/Work Team Contract Reference Number(s) Recharge CoA Requestor Name Statutory PPM
Show B	Hide Up Down

Select Fields	« <sup>۲</sup> >	×
Available Fields: Date to Perform Due Date Equipment Code	Visible Fields: Location (Name) Actions Problem Type/PM Procedure	
Equipment Standard Escalated for Completion? PM Procedure PM Schedule Code Problem Type Requested by Broom	Work Description/Comments Priority Date to Perform/Due Info Assign to/Work Team Contract Reference Number(s) Recharge CoA Requestor Name	
Site Status Service Request Code	Statutory PPM No. Craftpersons Date Work Completed	
	D Update Cancel	

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 Maintenance Console screen.

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

The following tables provide a recommended Maintenance Console screen layout:

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

#### 2.4 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 Maintenance Console screen, select the **(A) Tick Boxes** next to the work requests that you wish to apply the same action to.

	B Maintenance Console											
Wor	k Requests							(	в			<b>\$</b>
√2 s	selected Car	cel Selection	Estimate Schedul	e Schedule	Labor Issue Ca	incel Reque	est	$\mathbb{N}$	2			
	Date Work 1 Requested	Building ↓	Building Name 🇘	Work 1 Request	Location (Name) 1	Actions				Problem Type PM Procedure	Work Description Comments	Priority 1
	Requested	(48) >										
	Assigned to	Work Order	(9751) ~									
	21/03/2025	795	EASTER BUSH ENERGY CENTRE	1748510	EASTER BUSH ENERGY CENTRE	e	Ë	⇔	$\otimes$	PREVENTIVE MAINT C-HV-0001	*STAT* MONTHLY HV SUBSTATION INSPECTION PROCEDURE AND LOG RESULTS IN ZETASAFE	Default
	29/03/2025	2715	IRR SOUTH	1748509	IRR SOUTH	e"	Ċ,	Ŷ	$\otimes$	PREVENTIVE MAINT HE-D-001	*STAT* Carry out daily running checks of steam gen erator plant LOG RESULTS IN ZETASAFE Daily	Default
	29/03/2025	210	ROBSON BUILDING	1748508	ROBSON BUILDING 06-	e •	Ë	⇔	8	PREVENTIVE MAINT HE-D-001	*STAT* Carry out daily running checks of steam gen erator plant LOG RESULTS IN ZETASAFE Daily	Default
							_	_			*STAT* Carry out daily running checks of steam gen	

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.

#### 3.0 Appx B: Work Request Life Cycle

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

There are 6 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 be reassigned to another Work Team while at this status)

- 3. **Issued and in Process:** The Work Request is now with a Craftsperson and ready to attend.
- 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. There is a step to verify Completed work requests. Once verified 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. Archiving is run daily and looks to any Work Requests which have been Completed and Verified for 60 days prior to today's date.

Other optional statuses outside of the standard workflow

- 1. **Rejected:** A work request may be rejected by Estates Helpdesk if they are unable to triage due to lack of information. They will always attempt to contact the request to discuss before using this option.
- 2. **Stopped:** This should apply to PPM work requests only, where Maintenance Services need to cancel a PPM request.

#### 3.1 Valid Moves & Reasons to Change Work Request Status

Valid Status Changes					
Complete/On Hold	>	Issued	If completed in error/hold reason resolved		
Issued	>	Assigned	If issued in error		
Assigned		Requested	If priority/location/problem type needs amended		

#### 3.2Useful Prefixes

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

Prefix	Detail
*EMERG*	Highlights the priority of Work Request as Emergency
*URG*	Highlights the priority of Work Request as Urgent
*PRIOR*	Highlights the priority of Work Request as Priority
**PRIOR*	Highlights the priority of Work Request as Priority – priority changed at triage
*ROUT*	Highlights the priority of Work Request as Routine
*dd/mm/yy*	Highlights a specific date Work Request required to be completed by
*CS*	Work Request FAO Contract Services
*FMS*	Work Request requires FMS attendance – arranged by Helpdesk
*001LIFT1*	Work Request requires Lift Maintenance attendance – arranged by
	Helpdesk (example)
*PEST*	Work Request requires Pest Control attendance – arranged by Helpdesk
*GRAFF*	Work Request requires CEC attendance – arranged by Helpdesk
*LSS* or	Work Request requires Fume Hood Maintenance attendance – arranged by
*H&V*	Helpdesk
*BS*	Work Request FAO Building Services
*KEYS*	Work Request FAO Keys Department
*FEST*	Work Request FAO Festivals Team
*SS*	Work Request FAO Soft Services
*RECHARG*	Highlights possible rechargeable work, MS/CS to review and make decision
*DM*	Work Request which has been identified as Deferred Maintenance
*GESP*	Work Requests which are linked to heating set back activity

#### 4.0 Appx C: Priority Options

In some instances, the Problem Type selected will have a predefined (default) priority, however most cases you will be able to choose a priority from the lists below. These will be reviewed by Estates Helpdesk at the approval stage and may be amended to better suit the fault where needed. **4.Routine** should be selected unless there is a specific risk or impact to justify an escalated response.

1.Emergency	2.Urgent	3.Priority	4.Routine	5.By Agreed date
Requiring immediate response to prevent severe damage or injury	Failure causing serious disruption to operations	Failure causing moderate disruption to operations	Failure not having an operational impact	Rechargeable works, and by agreed date
Respond within 2 hours / Complete within 10 working days	Respond within 1 day / Complete within 10 working days	Respond within 5 working days / Complete within 10 working days	Respond within working 15 days / Complete within 30 days	Respond within 10 working days / Complete within 6 months

On Demand Work Request Priority options:

#### Fire Risk Assessment Priority options:

1.Immediate	2.1 Month	3.3-6 Month	4.6-12 Months	5.1-3Years
Imminent risk of significant harm. Immediate action required.	Considerable resources might have to be allocated to reduce the risk. Improvements should be undertaken urgently.	Essential action must be made to reduce the risk. Risk reduction measures should be implemented within a defined time period.	No major additional controls required. However, there might be a need for some improvements	Limited action is required, review FRA as recommended; existing controls are generally satisfactory
Respond within 1 day / Complete within 10 working days	Respond within 15 day / Complete within 30 days	Respond within 15 day / Complete within 3 months	Respond within 30 days / Complete within 12 months	Respond within 30 days / Complete within 36 months

## 5.0 Appx D: Reports

Archibus V2024.04 offers various reports across different modules. This will vary depending on your Role and access type. These can be found by either navigating through the side menus or searching for key words.

Some which are available to all users include

Report Title	Details
Building Postcodes	List of Buildings which includes postal codes
Building Occupants	List of Buildings showing occupancy filterable by School or Subject Area.
Building Occupants by School	List of Buildings showing occupancy filterable by building code
Estates Operational Report	Report of all work requests both live and archived, filterable by variety of criteria

#### APPENDIX E

#### 6.0 Appx E: Troubleshooting

Some issues can be resolved by ensuring the browser you are using to access is working correctly.

Archibus v2024.04 is optimised for use on either Chrome or Edge, using any other browser can cause issues in performance and functionality.

If you experience issues whilst using Chrome or Edge, we recommend resetting your browser before contacting <u>ebisusers@ed.ac.uk</u> for further assistance. To do this you would close all tabs open with Archibus open and clearing cache.

Cache is a type of temporary storage that web browsers and other applications use to save information or data from previously accessed resources, such as websites. When a user visits Archibus website, elements like console view set up, filter history and favourites are stored in the cache. This storage allows the browser to retrieve and load these files locally the next time the user visits the site, rather than downloading them all over again from the web server.

# 6.1 Clearing Cache

The cache can hold a variety of data types and contents that help improve performance but may also need to be cleared periodically to prevent issues like outdated data being displayed, increased storage space usage, and potential privacy concerns.

#### How to Clear Cache in Google Chrome

- Step 1: Open Chrome Menu
  - Open Google Chrome.
  - Locate the three dots in the upper-right corner of the browser window to open the main menu.
- Step 2: Access the Settings
  - Click on "Settings" from the dropdown menu.
- Step 3: Privacy and Security
  - In the Settings menu, scroll down to "Privacy and security" and click on it.
- Step 4: Clear Browsing Data
  - Within the "Privacy and security" section, click on "Clear browsing data." A new tab or window will open.
- Step 5: Choose What to Clear
  - You will see three tabs: Basic, Advanced, and On Device.
  - In the "Basic" tab, select "Cookies and other site data" and "Cached images and files." You can also select the time range, which defaults to "Last hour." For a complete clear-out, select "All time."
- Step 6: Clear the Data
  - Click on the "Clear data" button.
  - Wait for Chrome to finish clearing the cache which can take a few seconds or minutes depending on the volume of data.
- Step 7: Close the Settings Tab
  - Once the cache has been cleared, you can close the settings tab and continue browsing.

#### How to Clear Cache in Microsoft Edge

- Step 1: Open Edge Menu
  - Open Microsoft Edge.
  - Click on the three dots located in the upper-right corner to open the menu.
- Step 2: Settings
  - Select "Settings" from the dropdown menu.
- Step 3: Privacy, Search, and Services
  - On the sidebar of the Settings page, find and click on "Privacy, search, and services."
- Step 4: Clear Browsing Data
  - Under the "Clear browsing data" section, click on "Choose what to clear."

- Step 5: Choose What to Clear
  - In the "Clear browsing data" menu, you have the option to select what type of data to clear. For cache, ensure "Cached images and files" is checked. Again, you can select the time range to clear, from "Last hour" to "All time."
- Step 6: Clear the Data
  - Click on the "Clear now" button to clear the selected data.
- Step 7: Close Settings
  - After clearing the cache, you can close the settings tab.

#### Tips for Both Browsers

- Clearing your cache does not log you out from sites you are signed into, but it does remove cookies that could keep you logged into sites. Be sure to know your passwords or have them stored safely elsewhere if needed.
- For both browsers, using shortcut keys can speed up the process. For instance, on Windows, pressing `Ctrl` + `Shift` + `Delete` will immediately take you to the "Clear browsing data" window in both Chrome and Edge.
- Regularly clearing your cache can help keep your browser working efficiently and protect your privacy.

By following these steps, you can effectively clear the cache in both Google Chrome and Microsoft Edge, helping to ensure a smoother and more secure browsing experience.

## 6.2 Contacts for Help and Support

There are various options open to provide support around specific issues encountered when trying to access/use Archibus v2024.04

- Management of user profile and access type (inc changes to contact information)
  - Please contact Archibus System Support <a href="mailto:ebisusers@ed.ac.uk">ebisusers@ed.ac.uk</a>
- Help & Support with System issues (inc Mobile App)
  - Please contact Archibus System Support <a href="mailto:ebisusers@ed.ac.uk">ebisusers@ed.ac.uk</a>
- Help & Support with How to use
  - Fault Reporting Contact Estates Helpdesk <u>estates.helpdesk@ed.ac.uk</u> or 0131 650 2494
  - Space Contact Richard Mann <u>Richard.Mann@ed.ac.uk</u>
- Help & Support with Estates issues
  - Please contact Estates Helpdesk <u>estates.helpdesk@ed.ac.uk</u> or 0131 650 2494