User Guide

Web Central v2024.04

Mobile Application

Foreword

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

System Support

If you require assistance to use the mobile application, please contact Ebisusers@ed.ac.uk in the first instance.

More information on EBIS is available at:

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

Logging on to Web Central

Login to the mobile app using your user name and password:

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

The app will download the background data then load in any work allocated to your profile.

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 estates.helpdesk@ed.ac.uk or telephone 0131 650 2494.

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Document Version Control

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

1. Using The Mobile App To View & Maintain A Work Request

1.1. Purpose

This user guide is for members of the Estates maintenance team using a mobile device, and to show the different steps needed to complete the following activities:

- Access the Archibus app on a mobile device
- Retrieve a Work Request
- Place a Work Request on hold
- Update a Work Request to show as completed
- Creating a new Work Request

1.2. Launching The App/ Logging In

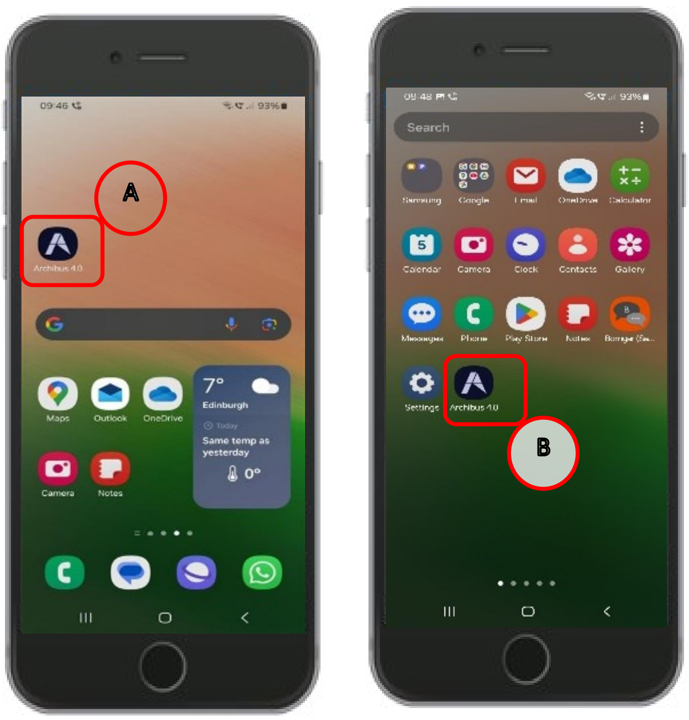
The Archibus Mobile App should be pre-installed on your device.

If this has not been done, contact Estates.IT@ed.ac.uk to arrange for this to be loaded.

The App should be a **(A)Shortcut** on the device home screen.

However, if the shortcut is not available, the App can still be accessed by searching the device apps**,** for the **(C)Archibus** app.

Tapping on the Archibus App Logo will open the App



1.3. Registering the Device/ Logging In

After opening the App for the first time or following a system outage you may be presented with the connect page, or login page, asking you to enter the UoE WebCentral internet address, which is: https://uedinburgh-sc.iwmsapp.com/archibus/

Enter the address and select the **(A) Connect** option

If the device has been used previously, the internet address may have been saved to the memory and can be accessed by selecting the **(B) Previous URL** option.

The system will then display the login page, asking you to enter your **(C) Archibus User Name and Password**.

Enter your details then select the **(D) Register Device** option.

(**NOTE**: It is important you log-on as yourself, as the Archibus WebCentral system will use your details to send your jobs to your device. If the device is logged on as someone else, then you will have access to their Work Request list, not your own).

1.4. Sync Your Job List

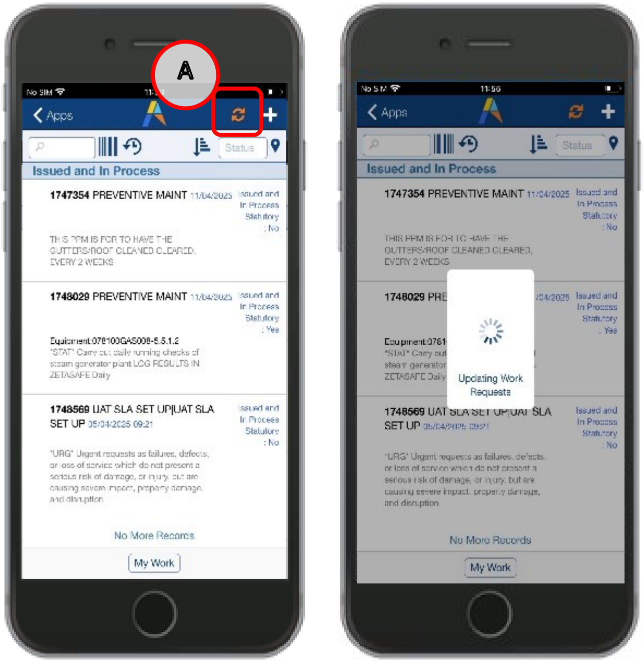
After Logging in, the **My Work** screen will be displayed. There are three key options you should use from this page:

(A) Sync, this option performs an update of your Work Requests by connecting to the main database. It sends your updated work back into the system, and receives new Work Requests issued to you.

The screen will show an update status while the sync is taking place.

You can repeat this action as many times as you need.

If a specific Work Request is not showing on your list, contact your Planner/ATL/Foreman for further advice.

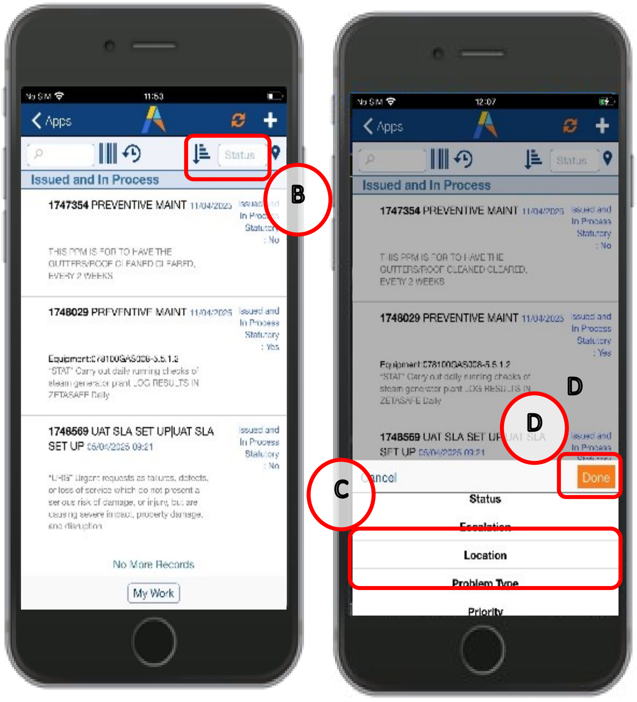


(B) Group By, allows you to change your view of the Work Requests.

Selecting this option will open a list, offering four different ways to view your list of Work Request, grouped by:

- Status
- Escalation
- Location
- Problem type
- Priority
- Work Team

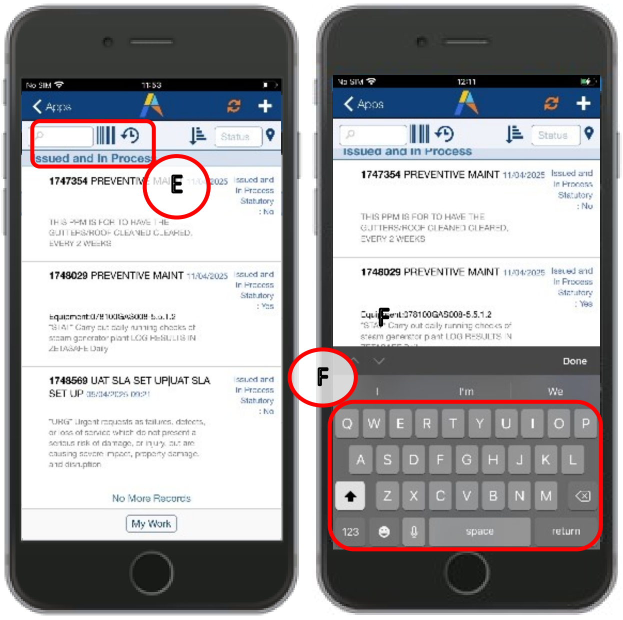
Use your finger to swipe up and down through the list, until the option you require is in the **(C) Highlighted Space**, then tap the **(D) Done** option.



The device will return you to the list of Work Requests and update the view based on your selection. In each view, the requests will also be in date order with oldest at the top. You can repeat this as many times as you wish.

(E) Search, allows you to locate a specific Work Request reference, building or job type.

Selecting this option will open the **(F) Keyboard**.



As you start typing the Work Request, the list in the background will automatically start filtering, depending on the details you enter.

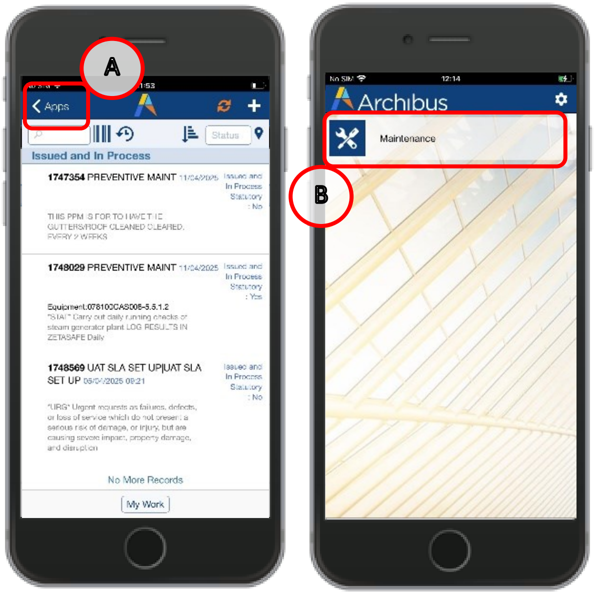
Tapping on an item in the list will open the Work Request screen.

If you are having issues syncing please check trouble-shooting advice in Appx A How to Reset the Background Data Sync Flag on the Mobile Device.

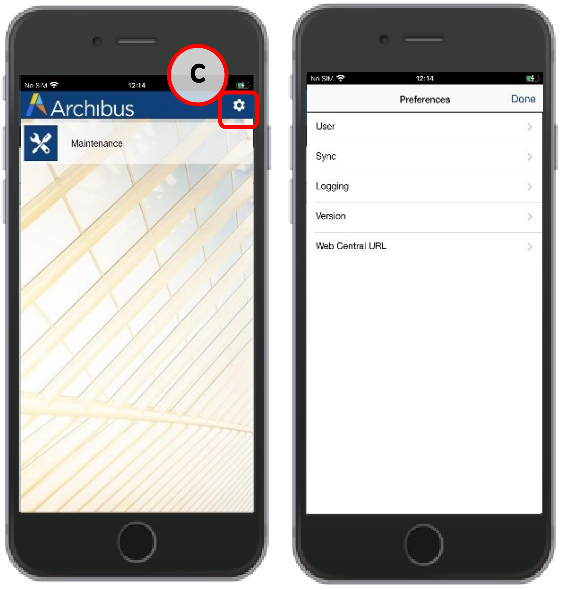
1.5. Navigating To The Application Menu

Selecting the **(A) Apps** will return you to the applications menu, where you can select different actions.

At present, some devices only have the **(B) Maintenance** option activated, though this may change in the future.



Selecting the **(C) Options cog symbol** will take you to a preferences menu.



The various preferences options available are as follows:

User > Allows the user to log in and log out of the app

Sync > Allows the user to reset the background data, and clear the settings data stored on the phone

Logging > Allows data logging of the phone for system diagnostic purposes

Version > Allows the user to view the current version of the app

Web Central URL > Allows the user to view and update the URL the app is connected to

Note: These menu options should not be used unless there is a problem with your phone.

1.6. Retrieving A Work Request

(A) Work request shows a brief description of the Work Request details including WR number, problem type, date requested, current status, if PPM is statutory and the WR description.

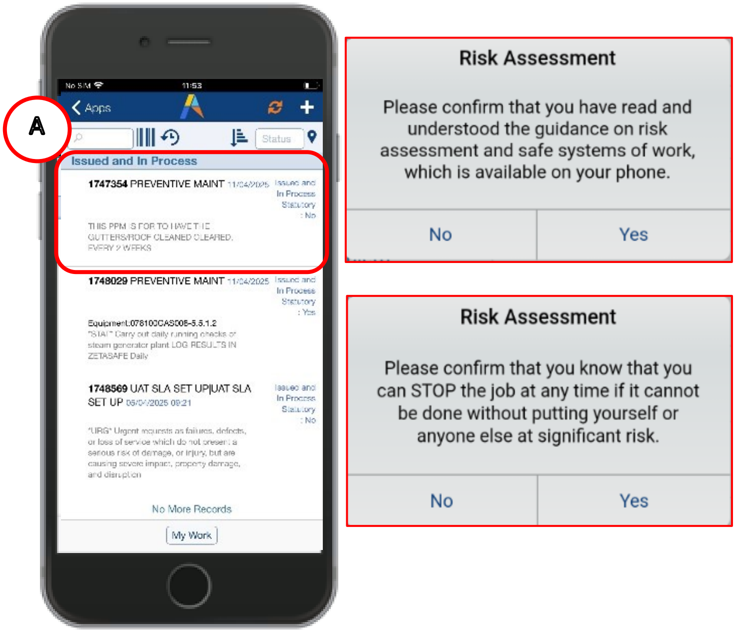
To select just click on a WR in the list, the device will display two risk assessment statements for you to respond to.

Tapping on the **Yes** option will allow you to progress through the two statements and access the Work Request detail screen.

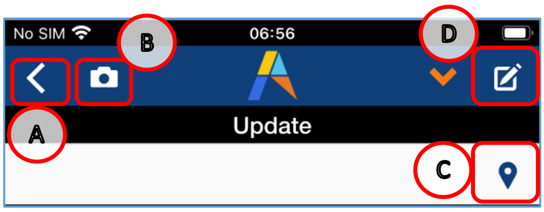
Tapping on the **No** option will return you to the **My Work** screen.

You will need to flag any risks to your ATL/Foreman and ensure safety steps are in place before you can continue with the Work Request.

When you have access to the Work Request, you can scroll the page up and down to view details of the Work Request.



1.7. Navigating A Work Request



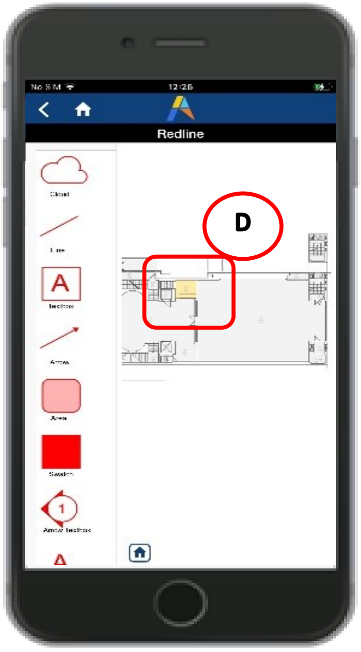
Some of the symbols at the top and bottom of the screen will help you perform different actions within the Work Request:

(A) Back Symbol, will close the Work Request without making any changes to it, and return you to the **My Work** list

(B) Camera Symbol, will allow you to upload a photo as a document. Taking a photo can help support the work you have undertaken or explain why additional work required. (see section 1.8.5 **Adding A Photo To A Work Request**)

(C) Location Symbol, if longitude and latitude have been captured as part of the work request (normally against an asset), the location symbol will become available and open a screen that will display a floor plan to help identify the location assigned to the Work Request.

(D) Drawing Symbol, if a floor and room have been added to the work request selecting this symbol will open the floor plan with the selected room coloured yellow. You can also then redline the plan with notes or markings to further highlight an update or issue with the work.



(E) Work Request Timer, this option will change as used giving options to Start / Stop / Resume the work request timer.

(F) Action Buttons

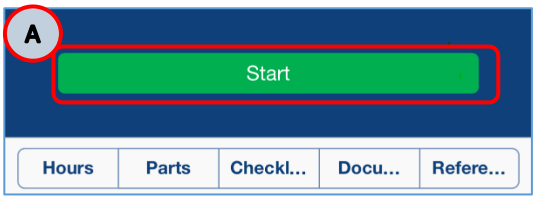
- **Hours,** will show the number of Craftsperson Assignments / Work Logs against the Request
- **Parts, not currently being used until inventory module working with P&M**
- **Checklist,** only applicable on work requests with Problem Type Gas
- **Documents,** the number in the red circle will indicate if any additional information has been attached to the Work Request, such as a photo or explanatory document.
- **References,** materials such as manuals if loaded against specific assets

Tapping on these options will open new screens and display details of the selected action.

1.8. Updating a Work Request

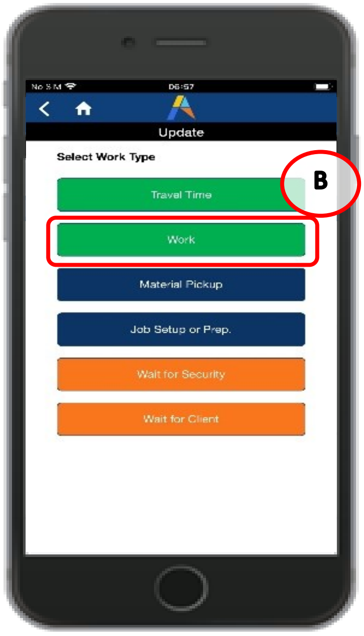
1.8.1. Updating Hours and Comments

Craftspersons should take advantage of the timer to track the time spent on a job using the Start, Stop, and Resume buttons. The timer tracks all the minutes that a craftsperson spends on a job and stores the times and dates. When the craftsperson completes an Assignment and syncs their phone, the system totals the hours worked in the work logs.



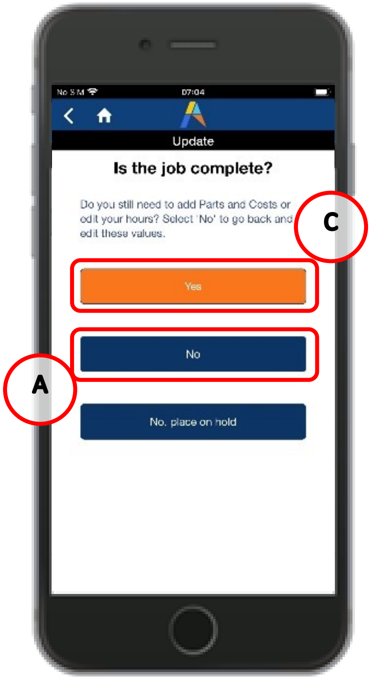
It is more efficient to use the timer buttons rather than manually track and then enter the time spent on a job as with these buttons, Craftspersons can record their hours quickly and accurately with a simple swipe.

Once you have accessed a work request and acknowledged the Risk Assessment questions you will have the option to **(A)Start** the timer. A list of work type options will then be presented. **All** time should be captured under **(B) Work**, this should include the travel time and time spent collecting materials etc so that each attendance has a single record **Total Time Taken**. (Note: Timer can only be running against one WR at a time, if you attempt to start timer on a second WR you will get an error message).

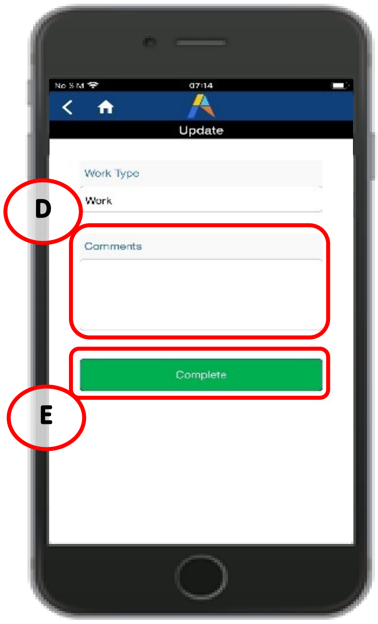


Once the timer is started the option at the bottom of the screen updates to **(C)Stop**. On selecting this you will be prompted to confirm if the job is complete and all parts etc have been captured correctly.

Selecting **(A) No** here will pause the timer and return you to the work request detail screen where you can access the action buttons to check/edit hours, parts etc. Or use the **(B) Resume** option if you were pausing to return later that day (e.g. after lunch or break) or another day. You will not be prompted to add comments, however these can be added by following steps in 1.8.2 Correcting Hours and Comments.



If the work is complete and you are happy all hours, parts etc are correct then select **(C) Yes** to complete the Work Log. At this point you will be prompted to enter **(D) Comments** against this final Work Log (comments field cannot be left empty).

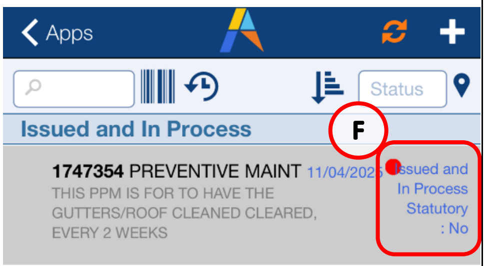


Note: Comments are visible to the initial requester and other Archibus User, they should explain the specifics of the job e.g. what you did, why is it not finished, what is going to happen next.

Any Health and Safety issues should also be captured here. Please ensure to start any comments related to Health and Safety issues clearly with the following prefix 'H&S' (ensure to leave no spaces and use '&' rather than 'and') then add the details of the issue you are reporting

All health and safety issues should be reported directly to your ATL/Foreman, significant issues will be highlighted to the Health and Safety team.

Once comments are entered select **(E) Complete**. This will return you to the My Work screen and a **(F) Red Dot** will appear indicating you have changes ready to be uploaded to the system.



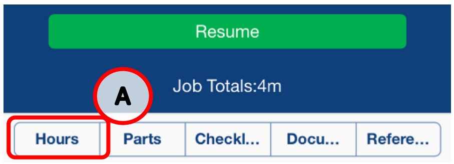
At this point unless there is a second Craftsperson Assigned, syncing your phone now will set the work request status to complete update a total of hours captured on your Work Logs.

If you wish to put the work On Hold, additional steps are required see 1.10 Placing a Work Request on Hold

(Note: Only one timer may be running at any one time, if you have not Stopped a previous timer begore attempting to Start a second, you will receive a message prompting you to return to previous job.)

1.8.2. Correcting Hours and Comments

If any errors are made using the work request timer these can be corrected by either speaking to your Planner/ATL/Foreman who can make corrections directly in the Maintenance Console, or by accessing the Work Log on the Mobile App.



Tapping on the **(A) Hours** will open a screen showing Assignments and Work Logs.

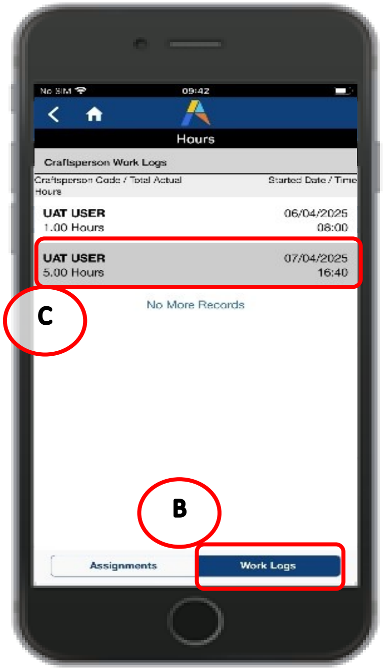
Navigate to **(B) Work Logs** and select the appropriate **(C) Record** to correct, in this example a timer has been started at 16.40 and left running until 21.40 by accident. To correct this, you can click on the **(D) Field** showing incorrect hours and overtype the entry, or you can use the **+/-** icons to alter the time. Ensure hours are captured as decimal eg 1hr 30 mins = 1.50.

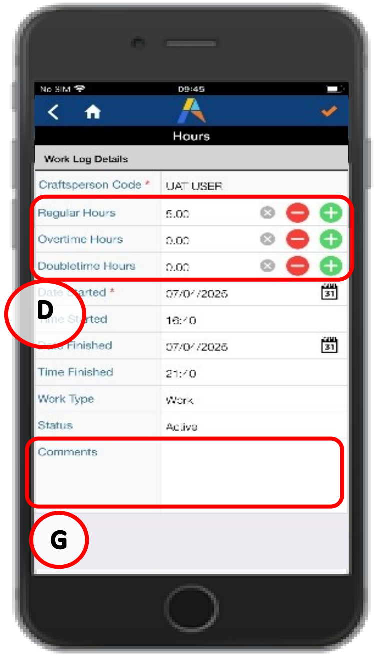
This may also be used if the hours need to be recorded in a different category as per list below:

- Regular Hours – capture of all hours during normal working hours
- Overtime Hours – capture of all hours during planned overtime including call out
- Double Time Hours - capture of all hours during unplanned or short notice overtime

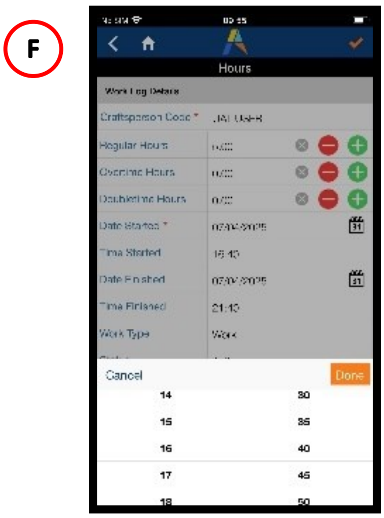
(**Note**: Hours are recorded in decimal format e.g., ½ hour is 0.50)

Start and Finish dates/times can also be corrected from this screen if needed.





- Dates will show a pop up **(E)Calendar** to help with selection
- Times will show with a **(F)scroll option** at the bottom of the screen



Note: Date Started is a mandatory field as should always reflect the correct date of attendance.

(G)Comments can also be added here against each attendance as needed. This is a free text box so click on it and use the keypad to add your notes about the job.

1.8.3. Updating Stock to a Work Request

Parts do not need to be captured against individual work requests at this time.

Section to be updated once Inventory modules working with P&M.

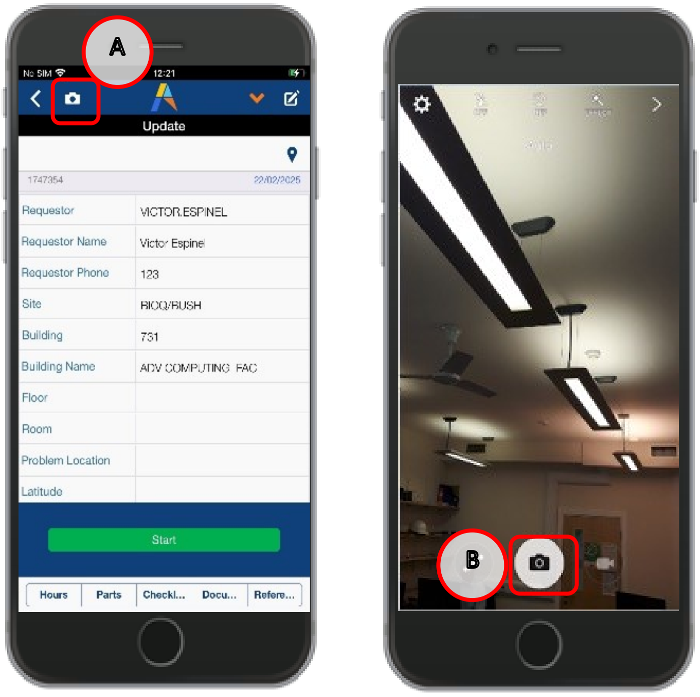
1.8.4. Completing a Checklist

Section to be updated once example available.

1.8.5. Adding A Photo To A Work Request

While performing the work, you may wish to add a photo to the work request, to support the work you have performed.

Selecting the **(A) Photo** will open the mobile devices camera function. Use the **(B) Camera symbol** to take a photo.



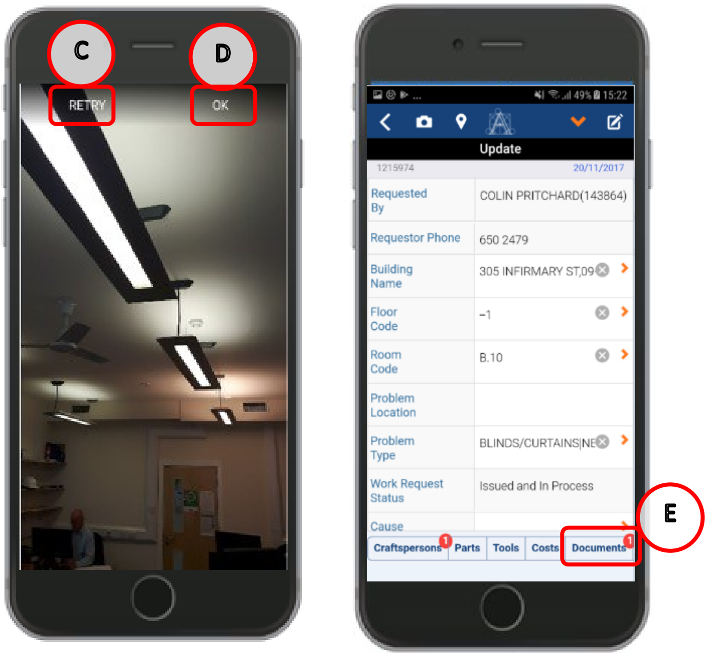
Once you have taken a photo, the mobile device will preview the image and offer two options.

If you are satisfied with the photo, select the **(C) Use Photo** option.

When you select this option, the device will save the image and return you to the work request screen.

The screen will now indicate a document is **(E) attached to the work request**.

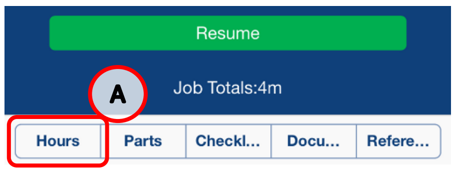
If you are not satisfied with the photo, you can select the **(D) Retake** option, which will return you to the previous step to re-take the photo. You can perform this step as many times as needed, until you are happy with the photo.



1.9. Adding Another Craftsperson To The Work Request

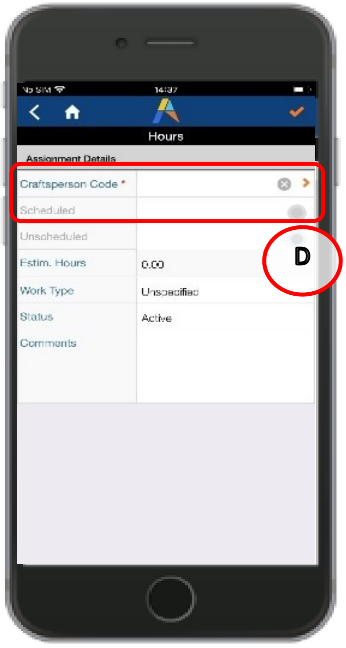
In some instances, you may have need to add another Craftsperson to a Work Request via the mobile App.

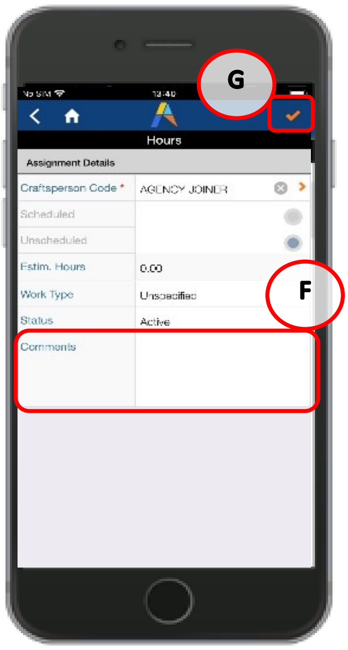
Firstly, access the correct work request from your list of jobs, and navigate to the **(A) Hours**.

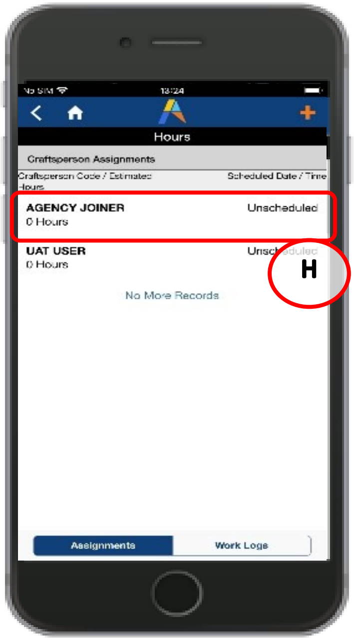


Ensure you are looking at the **(B) Assignments** and select **(C) + symbol.** This will open the Assignment Details page where if you click in the **(D) Craftsperson Code** field you can **(E) Search** for the correct colleague to be added. Once you have clicked on the correct name the screen will jump back to Assignment Details screen and populate the Craftsperson Code field. **(F) Comments** can be added to confirm why the colleague was added. Select **(G) Tick symbol** to confirm and you will be returned to the previous screen where the **(H) Additional entry** will be displayed.

(NOTE: If you add a colleague to the job, this will add the job to their mobile and only they can add time against their entry.)







1.10. Placing A Work Request On Hold/ Resuming A Held Work Request

If you are unable to complete the Work Request because you need to organise either parts, access or additional labour the request can be put On Hold.

As support from Planners/ATL/Foreman will be needed to resolve any issues resulting in a request being put on hold, it is essential that they are aware of the task and that the work request is passed to them to manage further.

To do this follow the steps described in 1.9 above, ensuring that you add the planner for the correct work team location. You should also discuss directly with Planner/ATL/Foreman to ensure issues are resolved promptly, and where parts are required complete the requisition book.

You should also ensure your hours, parts used to date etc are accurately captured. Then use the Stop function of the timer and select **(A) No, place on hold** when prompted. You will now be prompted to update the status and comments. By default the **(B)Update Status** field will be set to On Hold for Parts, however this can be changed by clicking on the field and using the **(C) scroll** options that appear at the bottom of the screen.

- **Parts** – Use this option if parts/materials are not in stock.
- **Labour** – Use this option if an additional trade/additional labour is required.
- **Access** – Use this option if when you attend access arrangements are required to be made via the ATL. If you are given a time/date to return, this option is not necessary.
- **Resume To Issued**, if a job is on hold, this will allow you to resume the job back to Issued and in Process.

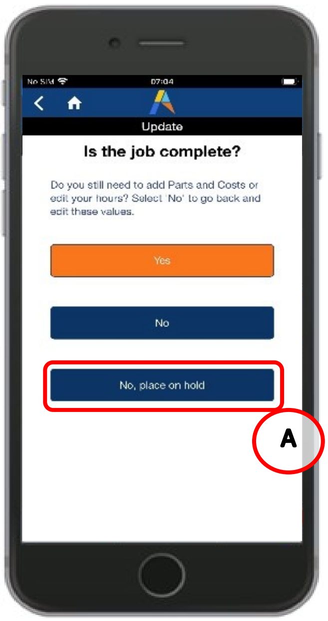
Once you have selected the correct reason you will also need to enter comments as this field cannot be left empty.

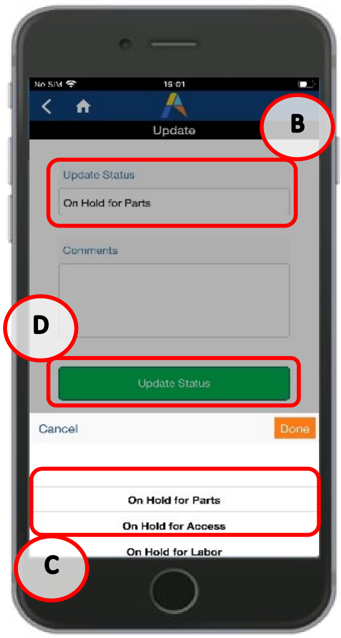
Note: Comments are visible to the initial requester and other Archibus User, they should explain the specifics of the job e.g. what did you do, why is it not finished, what is going to happen next.

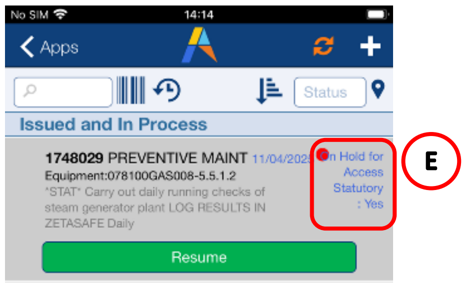
Any Health and Safety issues should also be captured here. Please ensure to start any comments related to Health and Safety issues clearly with the following prefix ‘H&S’ (ensure to leave no spaces and use ‘&’ rather than ‘and’) then add the details of the issue you are reporting

All health and safety issues should also be reported directly to your ATL/Foreman, significant issues will be highlighted to the Health and Safety team.

Once status selected and comments added click **(D) Update Status**. you will be returned to the My Work screen and a **(E) Red Dot** will appear indicating you have data ready to be uploaded to the system.







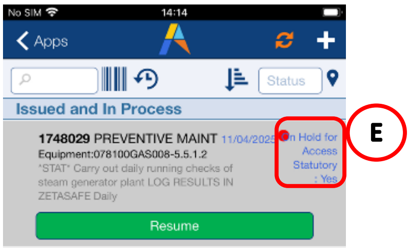
Syncing your phone now will create a new assignment to the Planner, change the work request status, and update a total of hours captured on your Work Logs.

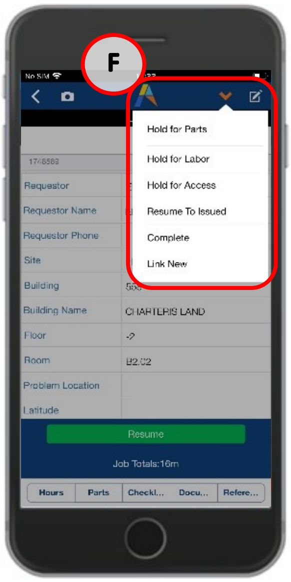
However, the Work Request will still show on your mobile as you have not yet completed your Craftsperson Assignment. Follow steps in 1.10 to complete your part in the work request for now and remove the work request from view on your mobile.

Alternatively, if the timer was previously Stopped you can also update the status using the **(F) Dropdown options**.

You will still have to ensure you have added the Planner assignment as above. Updating this way will not prompt you to add comments so you must ensure your comments are added to the previous work log.

Once you have selected the correct status and returned to the My Work screen a **(E) Red Dot** will appear indicating you have data ready to be uploaded to the system.



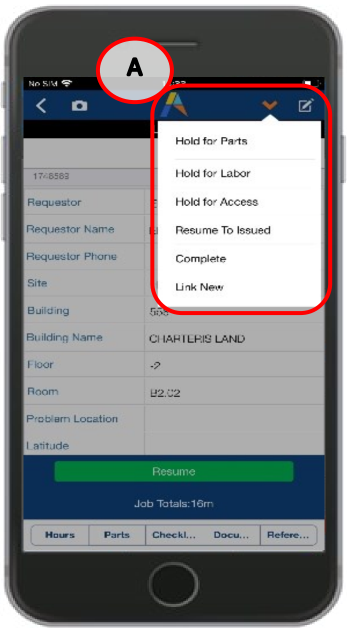


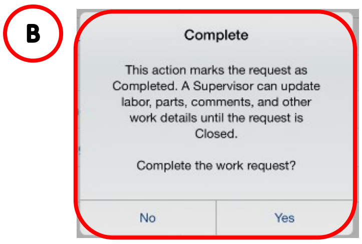
1.11. Completing a Craftsperson Assignment / Work Request

If you need to complete your Craftsperson Assignment outside of using the timer as described in 1.8.1this can be done by using the **(A) Drop Down**.

You can then choose the Complete option from the drop-down menu. A **(B) pop-up message** will appear prompting you to enter the number of hours spent on the job if not already done so.

Syncing the phone now will upload the changes to the server, the sync action stops the timer (if running) and removes the job from their work list.





If there is only one Craftsperson assigned this action will also set the Work Request status to Complete. If more than one Craftsperson is assigned the status remains unchanged until the last Craftsperson carries out this action.

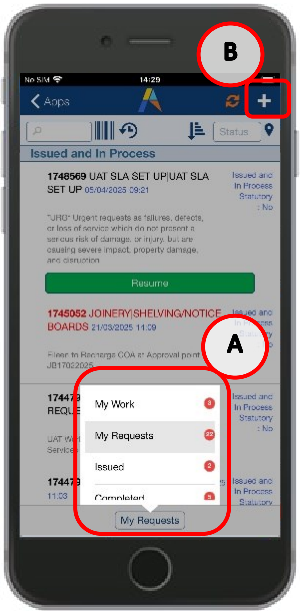
If necessary, Craftspersons can continue to add costs, parts, and labour information to a completed work request until they actually sync and upload the completed work request to the server.

1.12. Creating A Work Request From A Mobile Device

If you notice maintenance work that needs to be undertaken, you can raise a work request from your device.

Firstly, ensure you have changed the **(A) Work type** option to **My Requests** from the menu. If you raise a work request without changing this the work request will bypass normal approval/scheduling steps and issue directly to your phone.

Then select **(B) + symbol**, the device will display the Risk Assessment pop-up statements, select yes to move past these and the Create Work Request screen will appear for you to enter details.



There are a number of key actions you need to perform.

Step 1 is completing the **(C) Building Name, Floor Code & Room Code** fields; select each one in turn by clicking in the field, which will open a selection pop up screen.

Use the **(D) Search** function to limit the list if needed, and tap on the relevant selection. This will select the option, close the pop-up screen and copy the details into the relevant screen.

Then add a **Problem Location**, which allows you to add specific details about where the problem is in free text.

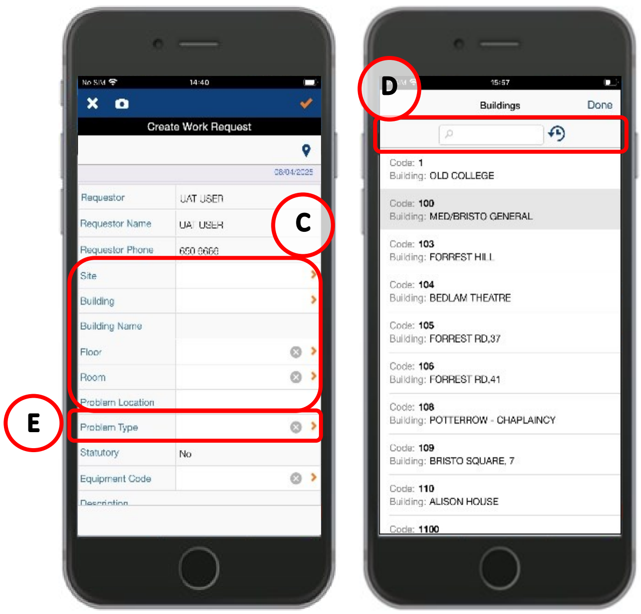
(Note: Selecting the **Red Arrow** to the right, will allow the device to open a screen so you can select the **Relevant Options**.

Selecting the **X** to the right will remove any selected options.

If you select the wrong details, you can repeat these steps a number of times until you have the right information needed.)

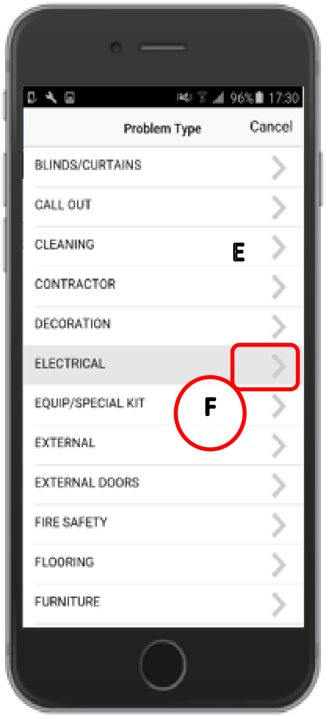
Step 2 is adding the **Problem Type** details

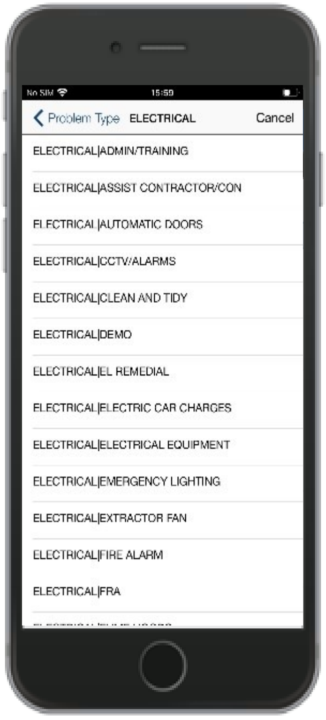
Select the **(E) Problem Type** field which will open the Problem Type pop up screen to select the first part (or tier) to the Problem Type.

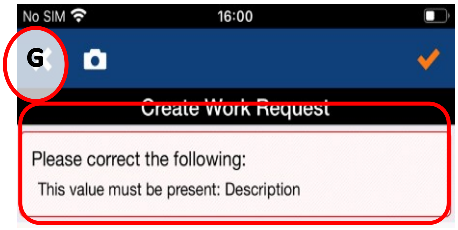


Scroll the screen to review the different first tier problem types, then select the **(F) Grey Arrow** to the right of the item you have selected.

This will open a further problem option screen, to select the second tier of problem type. It is important you select the Grey Arrow when choosing the problem type, otherwise the second tier will not appear, and you cannot create a work request with only a first tier (or Preventive Maint) Problem Type. If you attempt to do so, you will receive an **(G)Error Message**







(See **appendix A** for details of the different problem types available)

Scroll the screen to review the different details, and then select the relevant option.

This will save the problem type and detail selected, close the pop-up screens, and return you to the **Create Work Request screen**.

The two-tier Problem Type will have been saved to the **Problem Type** section on the Create Work Request Screen.

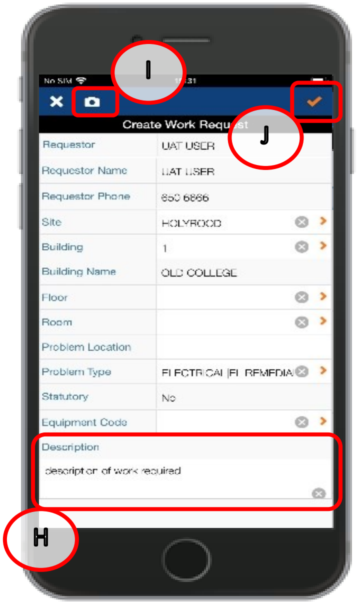
If the screen does not show the 2 pieces of information, repeat step 2, ensuring you select both options.

It is important to add a full **(H) Description.** This will open a text free box and allow you to add specific details about the work request, which will be used by both the Helpdesk to correctly assign the work request to a work team, and by the Planner/ATL/Craftsperson to understand the repair needed.

You can add a photograph to the work request by selecting **(I) Camera symbol.**

The final step when you have the correct details for the work request, is to select the **(J) Tick** option.

This will store the work request on the device and will only upload the next time a sync is carried out.



1.13 Adding a Linked Work Request from a Mobile Device

You can link two or more related work requests together by creating a second new request. Each new request generated follows the normal workflow starting with Helpdesk triage and approval.

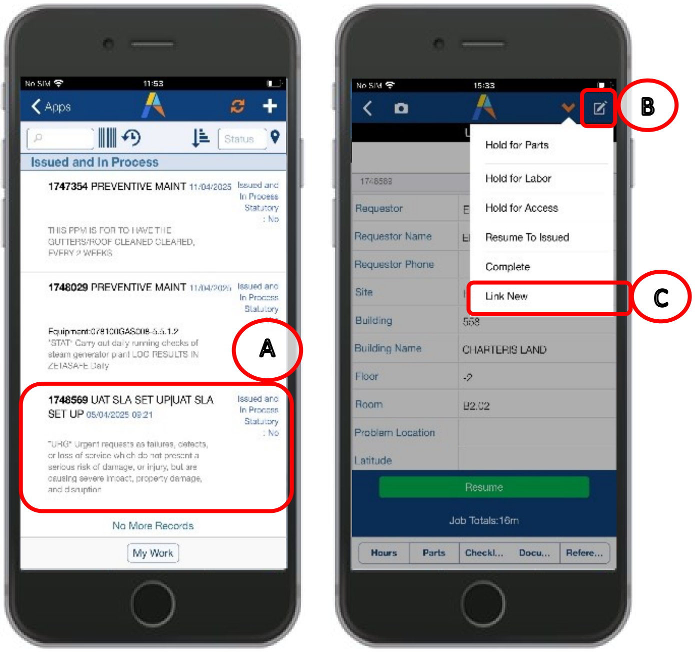
This feature can be used where carrying out a PPM work request identifies remedial actions required.

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

To do this access the original work request from your queue by **(A) Selecting** the request.

Pass through the risk assessment statements, then select **(B) Drop down** to show the update menu.

Select **(C) Link New**.



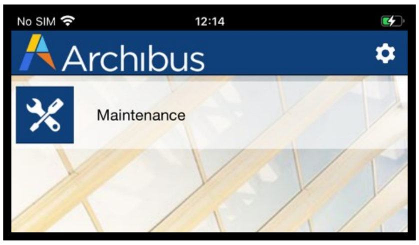
The device will then display the Create Work Request screen for you to enter details in the same way as described in 1.11.

Some fields will be pre-populated with some details when you create a linked request, these can be edited if needed. Please double check all details before submitting.

APPENDIX A

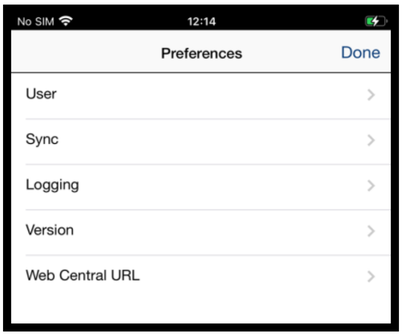
2. Appendix A: How to Reset the Background Data Sync Flag on the Mobile Device

On the mobile device go to the Maintenance Screen Menu then click on the Cog Wheel at the top right-hand corner of the screen (see print below)

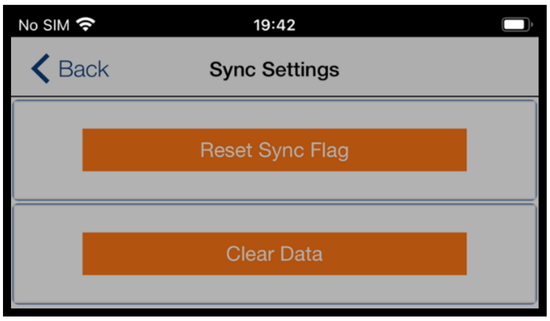


This will take you to the Preferences screen

Click on Sync



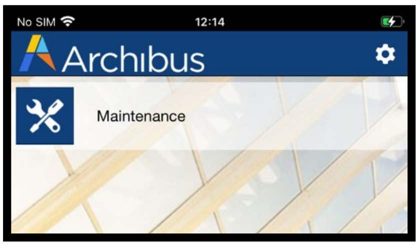
Click on Reset Sync Flag



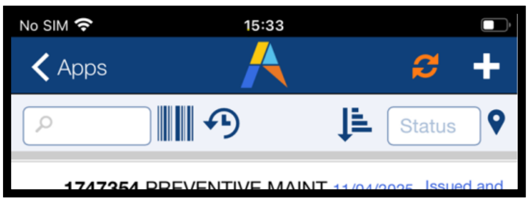
A message will appear asking you if you wish to Continue with the Reset of the Background data.

Click YES

Exit the back to the Maintenance Menus using the Back and then Done buttons



Click on Maintenance then **Sync the mobile device.**



Please note you will also need to clear the cache.

To do this :

Double Click the Home button on your phone then swipe the Archibus Mobile Screen upwards to close it down then restart the Archibus mobile app.