

User Guide

Web Central v2024.04

Supervisor

Reviewing A Team Work Request, Assigning To A Craftsperson, And Completing A Work Request

Foreword

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

System Support

If you require assistance, please contact ebisusers@ed.ac.uk in the first instance.

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

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

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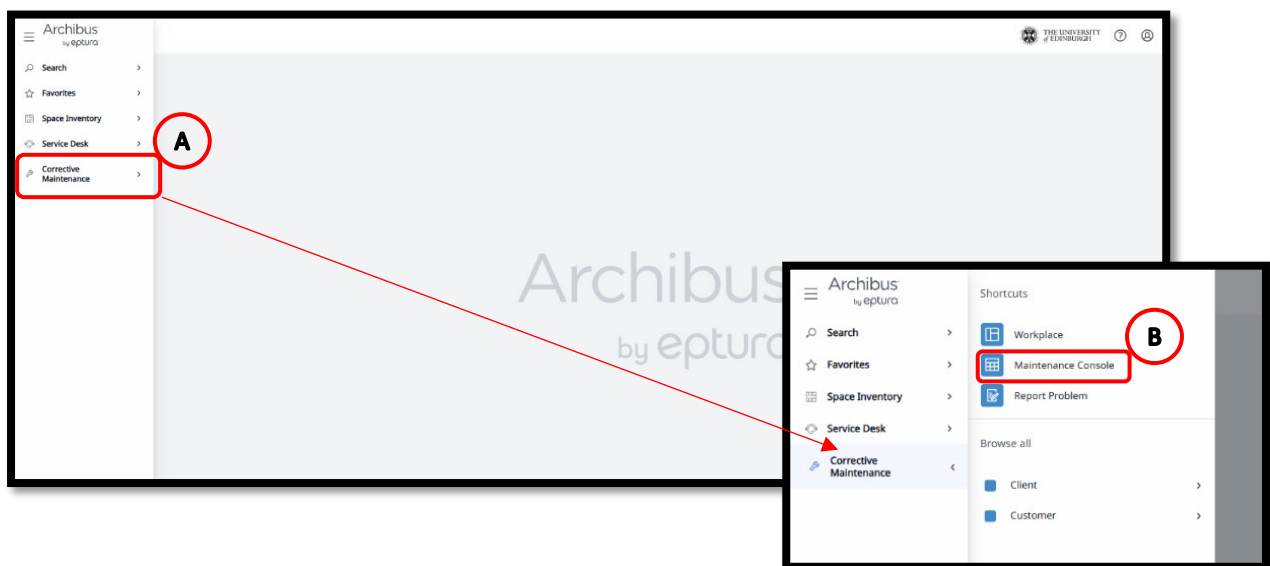
Purpose

This user guide is for Estates Staff with the *Work Team Supervisor* or *Work Team Supervisor - Stop* role and shows the different steps needed to complete the following activities:

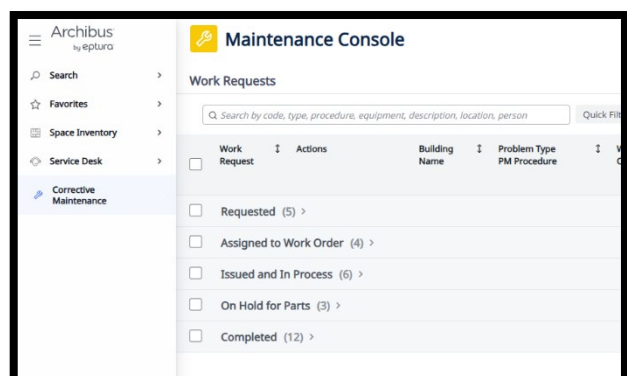
- Access the Maintenance Console to view Work Requests assigned to a specific work team queue
- Creating a Work Request
- Reviewing a Work Request
- Forwarding to another work team queue
- Assigning to a craftsperson(s)
- Completing a Work Request
- Cancelling a Work Request

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**.



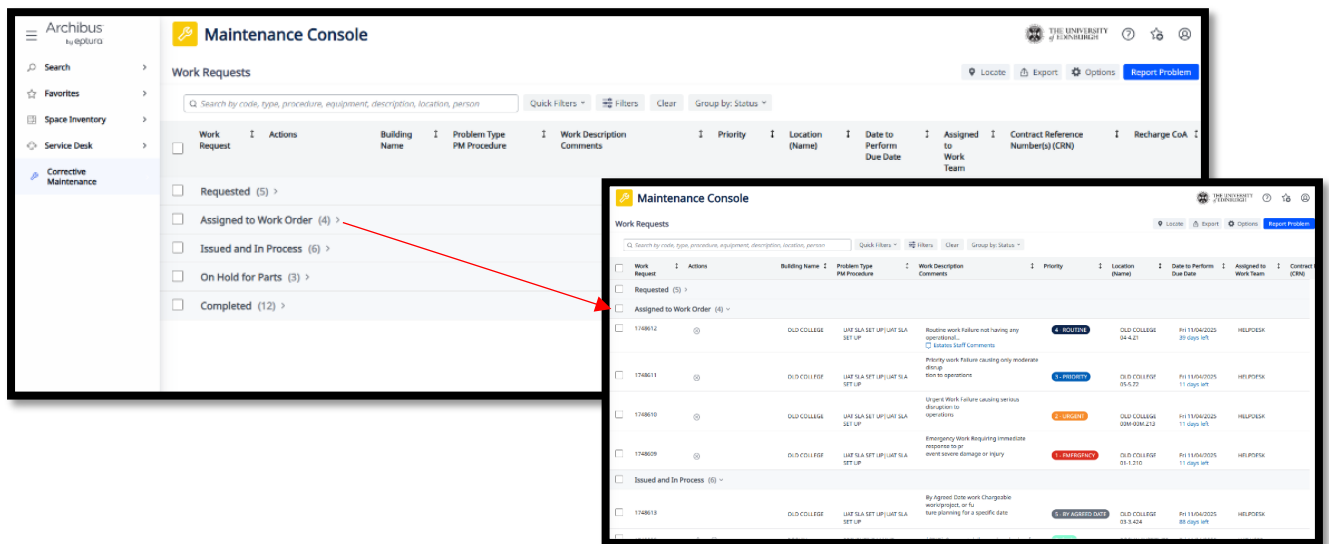
On the following screen, you will see a list of all open and recently completed Work Request assigned to your work team. The Maintenance Console page groups Work Requests by status.



(See [Appx A](#) 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 [Appx B](#) to understand the lifecycle of a work request)

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

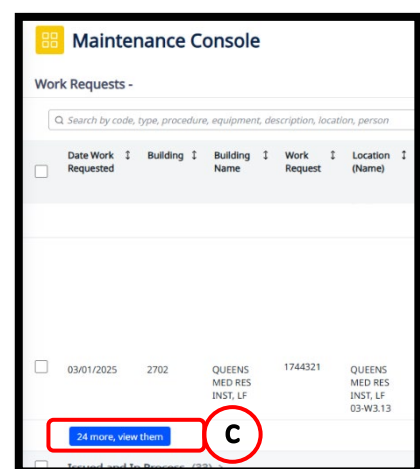


The following options will help to navigate the page:

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

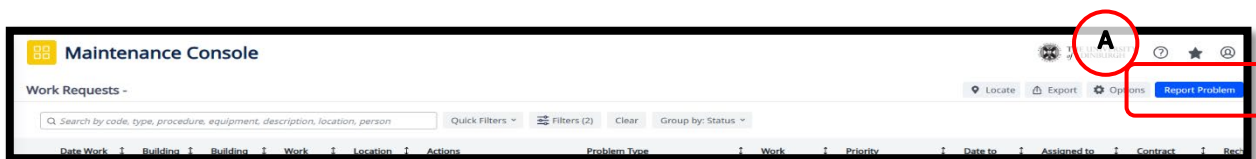
There are **Navigation sliders** to the right and bottom of the screen to scroll to information not on view

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 Them** button.



1.2 Raising A New Work Request

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



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 name and telephone number can be overwritten and changed if required. **(NOTE: You can request your default information to be changed by contacting ebisusers@ed.ac.uk)**

A screenshot of the 'Report Problem' form. The form is divided into four sections: 'Requestor', 'Location', 'Problem', and 'Description'. The 'Requestor' section is highlighted with a red box and labeled with a red 'B' in the top right corner of the image. It contains two input fields: 'Requested By' (populated with 'UAT USER') and 'Requestor Phone' (populated with '650 6666'). The 'Location' section includes a checkbox for 'Use your assigned workspace location' (checked), and input fields for 'Location' (populated with 'HOLYROOD'), 'FLOOR' (populated with '1'), and 'ROOM'. The 'Problem' section has a dropdown menu for 'Type of Problem'. The 'Description' section has a text area for 'Describe the location'.

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.

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.

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**.

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 which can be used to search for building name.

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).

Select Value - Room

Building Code: 1 | All

Building Code	Building Name	Floor Code	Room Code	Room Type
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

Close Add New

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

C ☒ Use your assigned workspace location

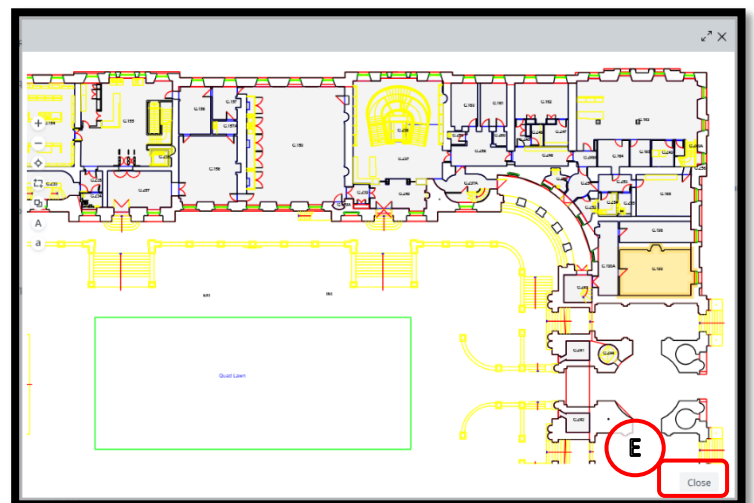
Location HOLYROOD 1 00 ROOM **D** Drawing Map

Describe the location
Enter the location specifically 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.

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.

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

Or

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

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

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

Problem Type Code	Problem Type Description
BLINDS/CURTAINS	BLINDS/CURTAINS
BLINDS/CURTAINS NEW INSTALLATION	NEW INSTALLATION
BLINDS/CURTAINS REPAIR	REPAIR
CALL OUT	CALL OUT
CALL OUT ELECTRICIAN	ELECTRICIAN
CALL OUT HEATING ENGINEER	HEATING ENGINEER
CALL OUT JOINER	JOINER
CALL OUT MANAGEMENT	MANAGEMENT
CALL OUT PLUMBER	PLUMBER
CLEANING	CLEANING
CLEANING BLOOD	BLOOD
CLEANING BROKEN GLASS	BROKEN GLASS

(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 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.

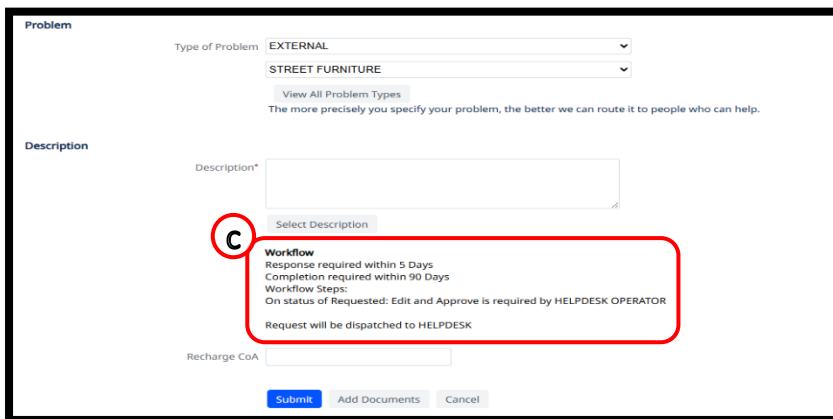
The **(B) Priority** and service level agreements (SLA) available have been pre-agreed.

Depending on the Problem Type selected, you may be given the option to choose from a selection of [priorities](#).

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 **4.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).

(**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).



Problem

Type of Problem: EXTERNAL
STREET FURNITURE

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

Description

Description*

Select Description

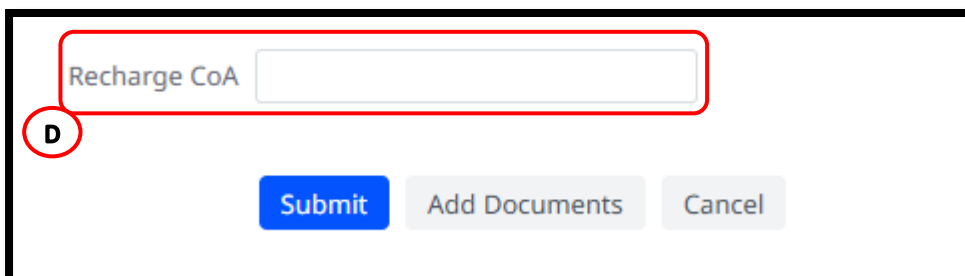
C

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

Recharge CoA

Submit Add Documents Cancel

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



Recharge CoA

D

Submit Add Documents Cancel

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 <http://www.estates.ed.ac.uk/helpdesk>

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.

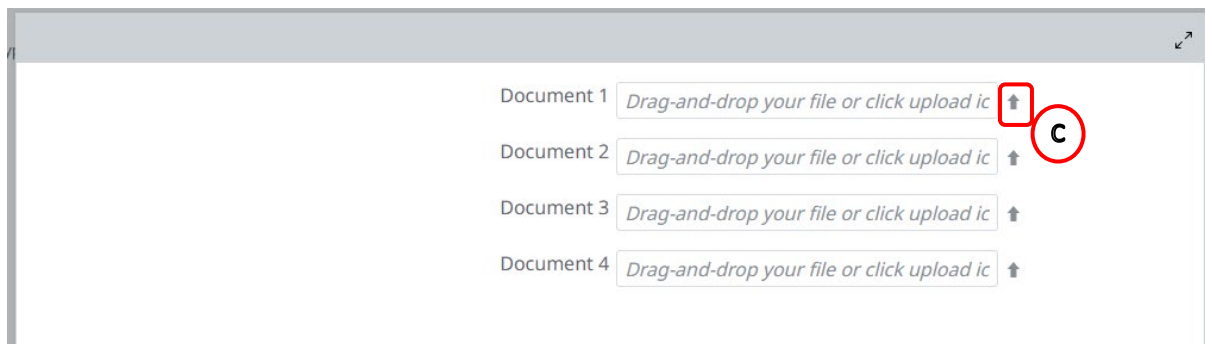
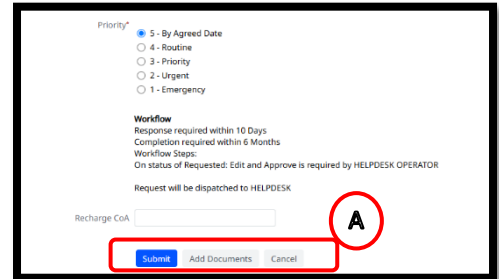
There are also three **(A) Action Buttons** –

- 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

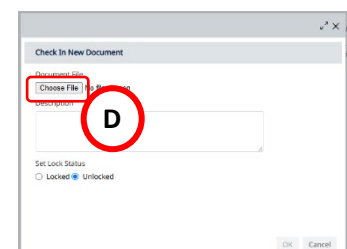


(NOTE: when uploading a document, you will need to have the item saved to a file location you can access)

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

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

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



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

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

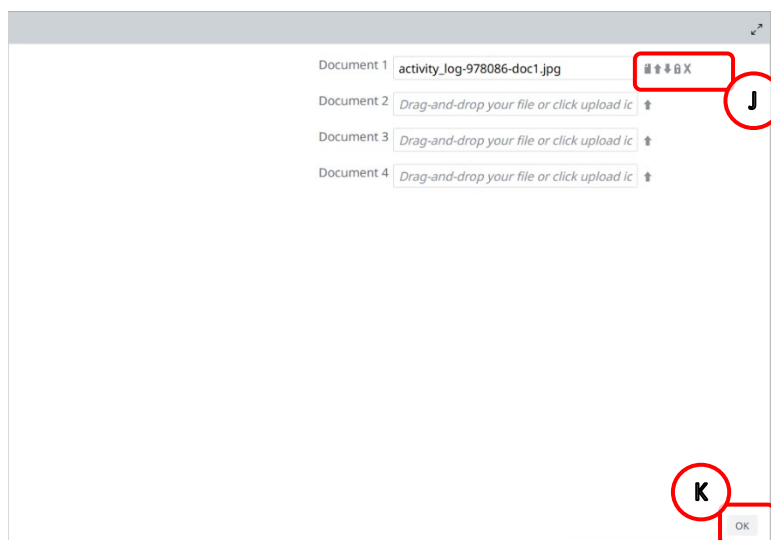
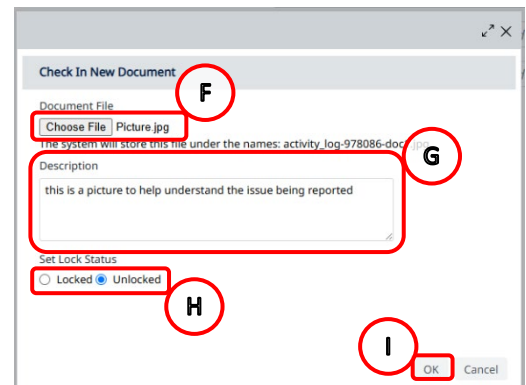
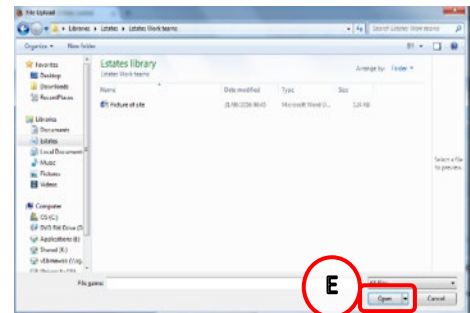
(NOTE: selecting the Close option will close the **Choose File** pop up screen and return you to the **Check in New Document** pop up screen without taking any action)

The **Check In New Document** pop up screen will now **(F) display the file selected for attaching** to the work request. It is important to add **(G) a Description** to help explain the nature of the attached document.

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

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

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



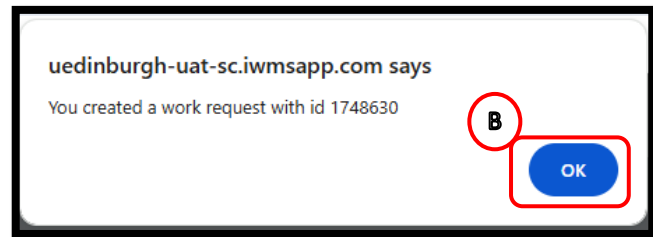
You can now use the **various icons (J)** to manage the attached document/picture. Hover your mouse over each icon to display each action Show/Check In/Check Out/Lock/Delete.

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

Before accepting or assigning a **Work Request**, you will need to review the details. All WRs assigned to your work team will arrive with a status of Assigned to Work Order.

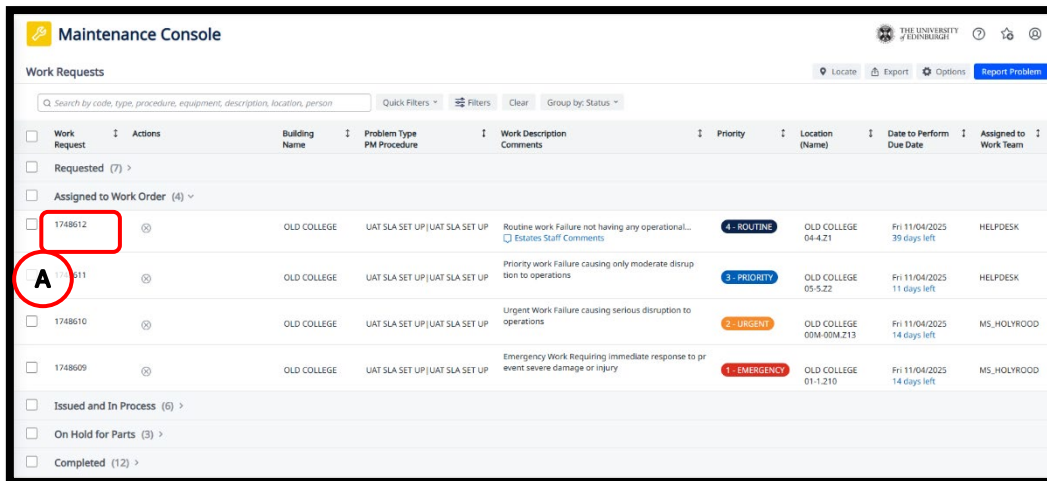
Navigate to the **Maintenance Console** screen and apply any filters, grouping or screen layout to help you locate an individual or selection of work requests as necessary.

(See [Appx A: Using filter & amending columns in the Maintenance Console Screen](#) for help on applying filters and grouping).

You will be able to see certain information on the Maintenance Console screen including the **(A) Work Description | Comments**. This will show the Description plus the last comment added to the WR. Hovering over the description will open up a pop out showing description in full.

<input type="checkbox"/>	Date Work Requested	Site	Building	Building Name	Work Request	Location (Name)	Actions	Problem Type PM Procedure	Work Description Comments	Priority
<input type="checkbox"/>	Assigned to Work Order (1750) v									
<input type="checkbox"/>	15/04/2025	BIOQ/BUSH	719	SMALL ANIMAL RIDDELL SWANN	1748634	SMALL ANIMAL RIDDELL SWANN 01-1.F05		UAT SLA SET UP UAT SLA SET UP	<div> <div>Priority work Failure causing only moderate dis...</div> <div> Estates Comments </div> </div>	3 - PRIORITY

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



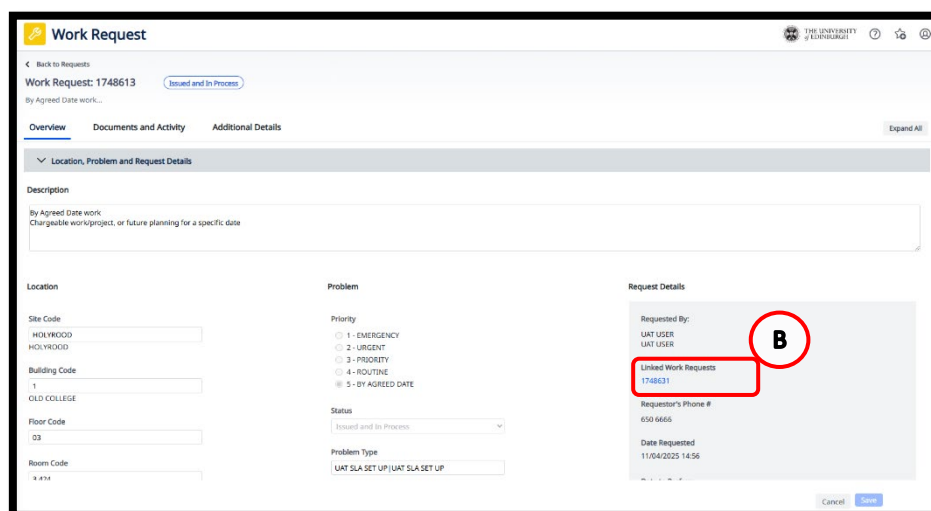
Work Request	Actions	Building Name	Problem Type PM Procedure	Work Description Comments	Priority	Location (Name)	Date to Perform Due Date	Assigned to Work Team
Requested (7) >								
Assigned to Work Order (4) >								
1748612		OLD COLLEGE	UAT SLA SET UP UAT SLA SET UP	Routine work Failure not having any operational... Estates Staff Comments	4 - ROUTINE	OLD COLLEGE 04-4-21	Fri 11/04/2025 39 days left	HELPODESK
1748611		OLD COLLEGE	UAT SLA SET UP UAT SLA SET UP	Priority work Failure causing only moderate disruption to operations	3 - PRIORITY	OLD COLLEGE 05-5-22	Fri 11/04/2025 11 days left	HELPODESK
1748610		OLD COLLEGE	UAT SLA SET UP UAT SLA SET UP	Urgent Work Failure causing serious disruption to operations	2 - URGENT	OLD COLLEGE 00M-00M-213	Fri 11/04/2025 14 days left	MS_HOLYROOD
1748609		OLD COLLEGE	UAT SLA SET UP UAT SLA SET UP	Emergency Work Requiring immediate response to prevent severe damage or injury	1 - EMERGENCY	OLD COLLEGE 01-1-210	Fri 11/04/2025 14 days left	MS_HOLYROOD
Issued and In Process (6) >								
On Hold for Parts (3) >								
Completed (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

Work Request: 1748613 Issued and In Process

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

Site Code
HOLYROOD
HOLYROOD

Building Code
1
OLD COLLEGE

Floor Code
03

Room Code
0-474

Problem

Priority
☐ 1 - EMERGENCY
☐ 2 - URGENT
☐ 3 - PRIORITY
☐ 4 - ROUTINE
☒ 5 - BY AGREED DATE

Status
Issued and In Process

Problem Type
UAT SLA SET UP|UAT SLA SET UP

Request Details

Requested By:
UAT USER
UAT USER

Linked Work Requests
1748631

Requester's Phone #
650 6666

Date Requested
11/04/2025 14:56

Cancel Save

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

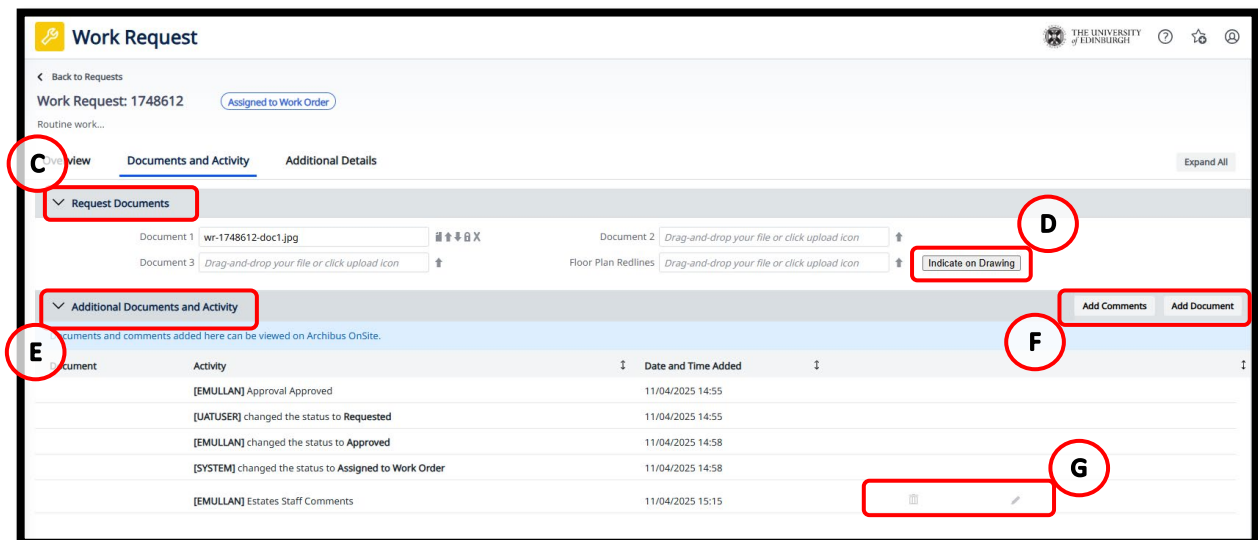
When you select **(B) Related Requests** the **Work Request** pop up screen for the linked request will be displayed.


Trades is currently not used.

Craftsperson Assignments will show details of any Estates staff member scheduled to carry out the work described. (**Note:** staff can be assigned but the work is not considered under way until the work request reaches Issued status).

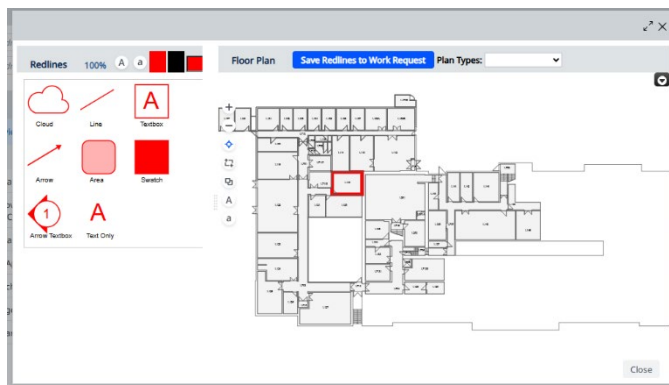
Work Logs are where records of Craftsperson attendance will show, and will include the date attended hours spent and any comments from the Craftsperson (**Note:** this only applies to Maintenance Services staff using Mobile App)

Documents and Activity:



(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** icon. If you wish to upload a new document select the  icon and follow steps described in [1.2.5](#)

You can also use the (D) **Indicate on Drawing** to update floor plans (if floor has been selected as part of location) with redlines in the pop-up screen.



(E) **Additional Documents and Activity** shows a chronological list of actions and comments. You can also (F) **Add Comments** and **Add Documents** from here.

Once a comment has been added you will be able to **(G) 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 to severity or impact of faults.

(F) Add Documents allows you to upload a local file or a weblink. Using **Add Documents** creates a document which is only viewable while the work request is live, these do not archive. Only those added in Request Documents are available once archived.

Additional Details:

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	
EILEEN MULLAN(164640)	11/04/2025 15:15	Comments	Assigned to Work Order	None	Estates Staff Comments

(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.

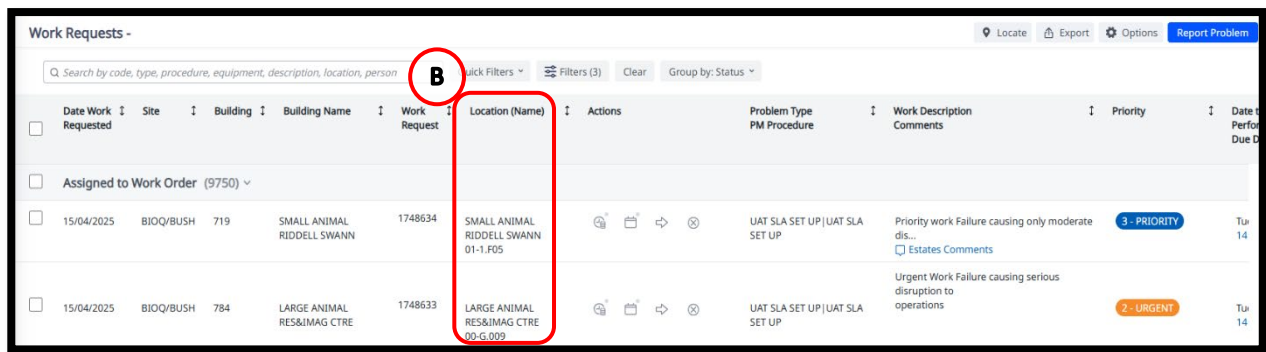
(H) Account Information relates to various cost information captured against the work request for Finance use only.









1.3.1 Viewing a Floor Plan

There is an option that can display the floor plan for the location attached to the work request.

On the Maintenance Console if you have included the column Location (name) in your view, and where this contains a floor code clicking in this will open up a floor plan. Where the Location also contains a room code the room will be highlighted in yellow.






<input type="checkbox"/>	Date Work Requested	Site	Building	Building Name	Work Request	Location (Name)	Actions	Problem Type	Work Description	Comments	Priority	Date Performed	Due Date
<input type="checkbox"/>	Assigned to Work Order (9750) ▾												
<input type="checkbox"/>	15/04/2025	BIOQ/BUSH	719	SMALL ANIMAL RIDDELL SWANN	1748634	SMALL ANIMAL RIDDELL SWANN 01-1.F05	   	UAT SLA SET UP UAT SLA SET UP	Priority work Failure causing only moderate dis...	<input type="checkbox"/> Estates Comments	3 - PRIORITY	Tue 14	
<input type="checkbox"/>	15/04/2025	BIOQ/BUSH	784	LARGE ANIMAL RES&IMAG CTRE	1748633	LARGE ANIMAL RES&IMAG CTRE 00-G.009	   	UAT SLA SET UP UAT SLA SET UP	Urgent Work Failure causing serious disruption to operations		2 - URGENT	Tue 14	

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

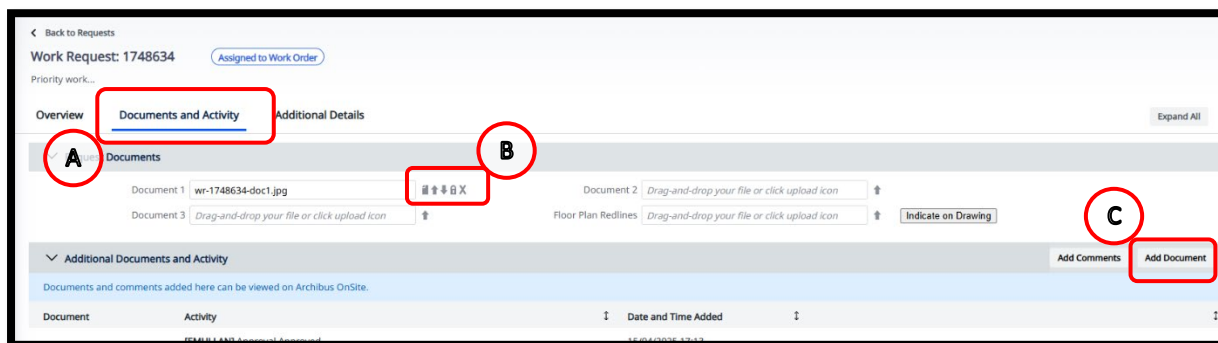
1.3.2 Viewing And Adding Documents / Pictures

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

Attached documents will be visible in the **(A) Documents and Activity** section

Selecting the **(B) Show Document** icon  will allow you to view pictures in a pop-up screen, or download a copy of other document types.

(Note: Check out Document **(down arrow)** can also be used)








Work Request: 1748634 Assigned to Work Order


Priority work...


Overview **Documents and Activity** Additional Details Expand All

A Documents

Document 1    

Document 2 

Document 3 

Floor Plan Redlines  Indicate on Drawing


B

C Add Comments Add Document

Additional Documents and Activity

Documents and comments added here can be viewed on Archibus OnSite.

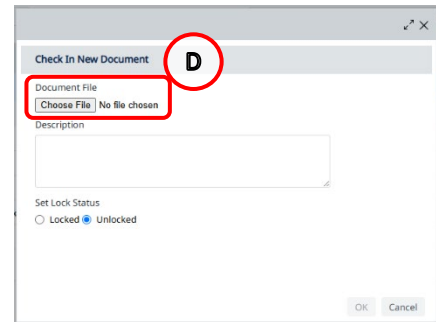
Document	Activity	Date and Time Added
REPAIR AND Approval Approval		15/04/2025 17:12

If you wish to upload a document, find a blank Upload A Document field and either drag and drop a file here or select the  icon.

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

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

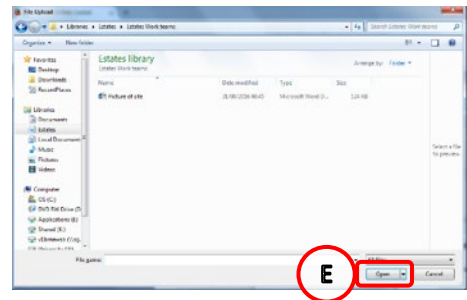
Select the **(D) Choose File** option.



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

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

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



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

The **Check In New Document** pop up screen will now show **(F) display the file selected for attaching** to the work request. The file name will be the same as saved on your device, it will not update to the WR number.

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

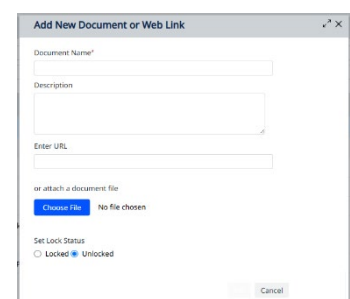
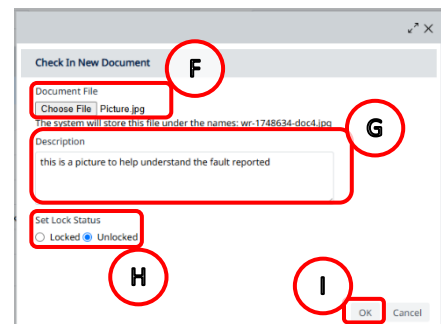
Ensure the set lock status **(H) Unlocked** option has been selected

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

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

(C) Add Documents allows you to upload a local file or a weblink. Using **Add Documents** creates a document which is only viewable while the work request is live, these do not archive. Only those added in Request Documents are available once archived.

(J) Choose File will open the standard Microsoft **File Browser** pop up screen, follow steps above to upload a file. The **(K) Enter Url** can be used to link to a SharePoint file (ensure correct permissions are assigned to file). Any links added will appear in **Additional Documents and Activity** in same way as comments.



1.3.3 Viewing And Adding Comments

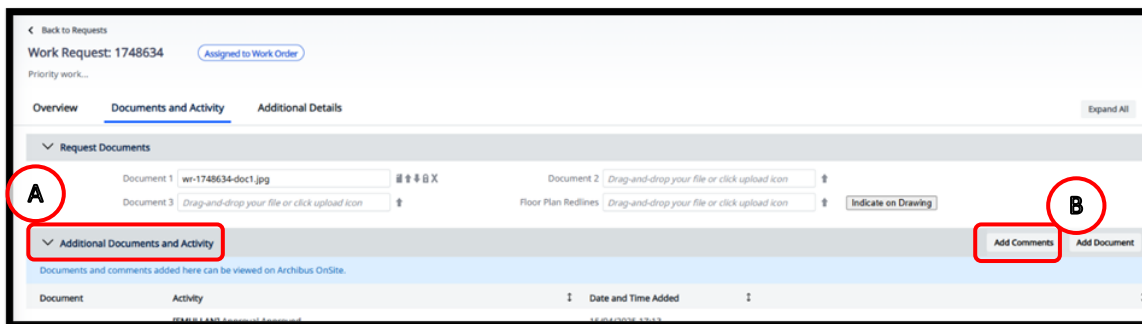
There is an option to view or add any comments for a **Work Request**.

It is important to record comments in order to capture all updates and amendments to a work request, this provides a date & time stamped record of all actions taken. If you are making any amendments to a work request, it is important to add a comment as this will help support why you performed the action.

Navigate to the **(A) Additional Documents and Activity Comments** section under Documents and Activity.

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

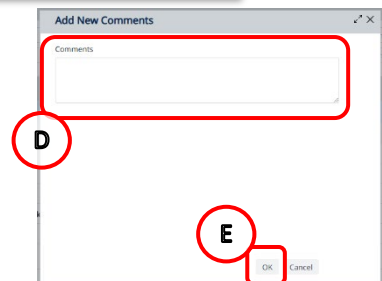
To add any new comments, select the **(B) Add Comment** option.



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

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

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



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

Once your comment has been added you will have the option to edit or delete it if needed, using the icons to the right of the comment. You can only edit or cancel your own comments.



(Note: All comments are visible to the requester and other WebCentral Users)

1.3.4 Rechargeable Work in a Non-Rechargeable Building

If a work request is rechargeable to the customers department, and the customer is not based in a building which is on a rechargeable model, this will need to be captured in the

work request to allow Estates Finance to retrieve the amounts from other Schools/Colleges (previous eIT process).

If the customer knows in advance that they should pay for their request, they can include their P&M **(A) Recharge CoA** code string when raising a work request. This will then be viewable in the **Location, Problem and Request Details** section under Overview.

Work Request: 1748634 (Assigned to Work Order)

Overview Documents and Activity Additional Details

Problem Location

Latitude

Longitude

Contract Reference Number(s) (CRN)

Contract Reference Number(s) (CRN)

Recharge CoA 110.110002.40088023.2954.101421.10000100.000

Statutory PPM

Equipment Code

Equipment Standard

Recharge

Trades

Craftsperson Assignments

The Helpdesk team will attempt to identify any rechargeable work during the approval step. They will then flag this via their approval comments and also via **(C) Works Description** adding the prefix code ***RECHARG*** before passing to the relevant Estates Team to progress.

Date Work Requested	Site	Building	Building Name	Work Request	Location (Name)	Actions	Problem Type PM Procedure	Work Description Comments	Priority	Date Perf Due
15/04/2025	BIOQ/BUSH	781	ROSLIN INSTITUTE	1748635	ROSLIN INSTITUTE 01-1.001A		UAT SLA SET UP UAT SLA SET UP	*RECHARG* By Agreed Date work Chargeable work... *RECHARG*	5 - BY AGREED DATE	Tue 91
15/04/2025	BIOQ/BUSH	719	SMALL ANIMAL RIDDELL SWANN	1748634	SMALL ANIMAL RIDDELL SWANN 01-1.F05		UAT SLA SET UP UAT SLA SET UP	Priority work Failure causing only moderate dis... Estates Comments	3 - PRIORITY	Tue 14

If on review it is agreed by the work team that the work requested is Rechargeable, the customer should be contacted out with the system to agree a cost estimate and timescale, and to confirm they wish to proceed. The customer will then be required to provide their CoA codes (if not already done so) before work can proceed.

The CoA should be entered by the ATL/Supervisor into **(D) Recharge CoA** within the **Location, Problem and Request Details** screen, ensuring the drop down **(E) Recharged** is also set to YES before setting work request to **Issued** status.

Work Request: 1748635 (Assigned to Work Order)

RECHARG ...

Overview Documents and Activity Additional Details

Problem Location

Latitude

Longitude

Contract Reference Number(s) (CRN)

Contract Reference Number(s) (CRN)

Recharge CoA 110.110002.40088023.2954.101421.10000100.000

Statutory PPM

Equipment Code

Equipment Standard

Recharge Yes

Trades

Craftsperson Assignments

15/07/2025

Workflow

Response required within 10 Days

Completion required within 3 Months

Workflow Steps:

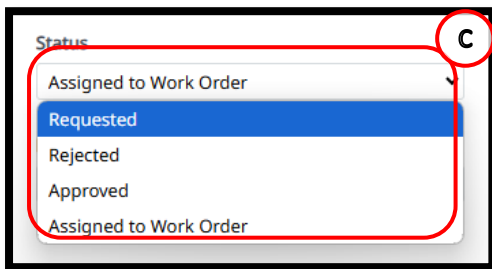
On status of Requested: Edit and Approve is required by HELPDASK OPERATOR

Request will be dispatched to HELPDASK

1.4 Returning a Work Request

If on review of a new work request you find that any of the **Location, Problem and Request Details** are incorrect a Work Request can be Returned to the Helpdesk for editing

Open the Work Request and view the **Location, Problem and Request Details** in Overview. You can now change the **(C) Status** of the work request to **REQUESTED** by selecting the drop-down menu.

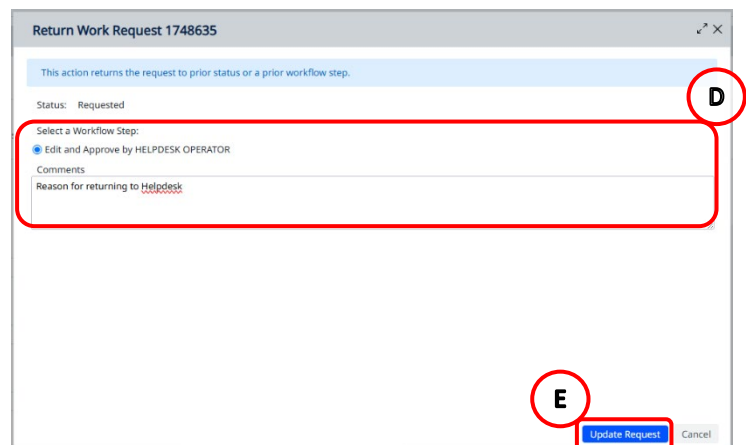


(**Note:** Rejected and Approved should **not** be selected see ([Appx B](#)) for descriptions of each status)

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

You are now required to add **(D) Comments** giving the reason for returning the request, and then select **(E) Update Request** to complete the change in status step.

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



1.5 Forwarding A Work Request to Another Team

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

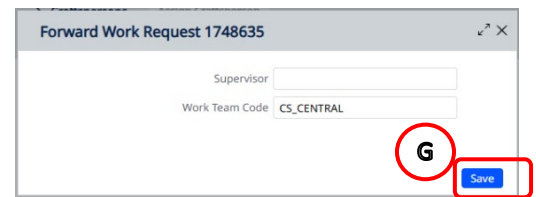
(**NOTE:** before starting this action, see [section 1.3.5 Viewing and Adding Comments](#).)

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

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

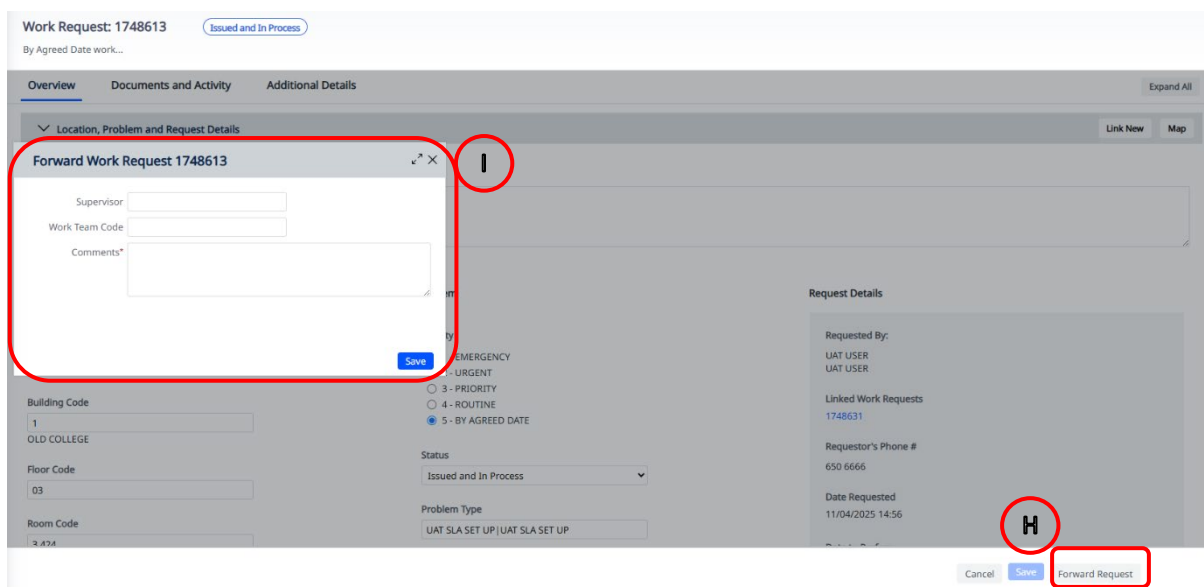
If you select a wrong team, you can repeat these steps until you have the desired team.

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



The Work Request will have disappeared from your Maintenance Console screen and will now be visible to the respective Work Team queue.

While a work request can also be forwarded at status **Issued and in Process** the preferred method for passing work to another team after actions have been taken is via Link New function, see [section 1.10 Linking A Work Request](#)



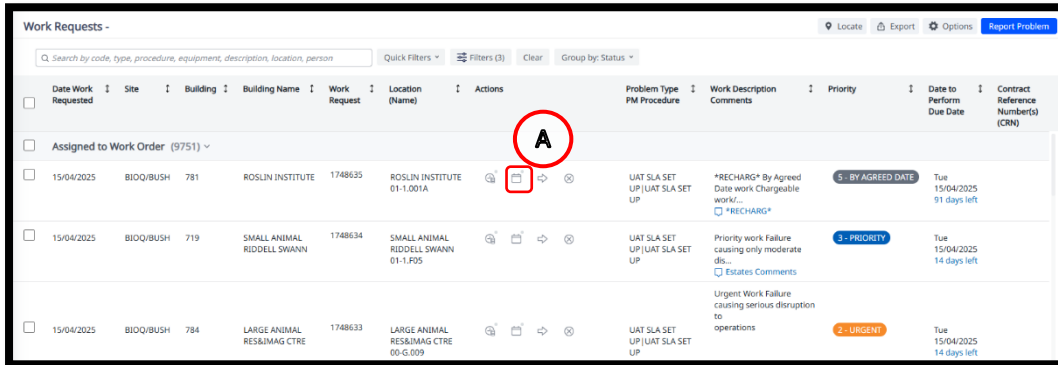
To do this access the **Work Request** pop up screen of the existing request by selecting the **Work Request code**.

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

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

1.6 Assigning A Craftsperson to A Work Request

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

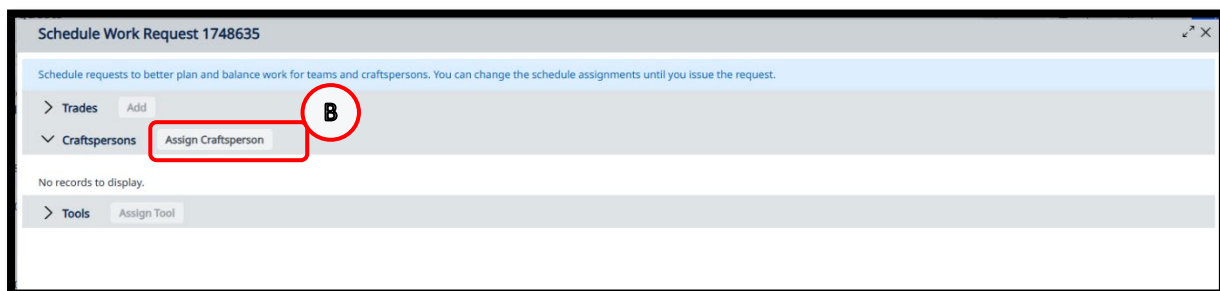


The screenshot shows a table of work requests. The 'Actions' column contains several icons. The icon for scheduling (a calendar with a checkmark) is circled in red and labeled with a red 'A'. The table has columns for Date Work Requested, Site, Building, Building Name, Work Request, Location, Actions, Problem Type, Work Description, Comments, Priority, Date to Perform, Due Date, and Contract Reference Number(s) (CRN).

Date Work Requested	Site	Building	Building Name	Work Request	Location	Actions	Problem Type	Work Description	Comments	Priority	Date to Perform	Due Date	Contract Reference Number(s) (CRN)
Assigned to Work Order (9751) v													
15/04/2025	BIOQ/BU5H	781	ROSILIN INSTITUTE	1748635	ROSILIN INSTITUTE 01-1.001A		UAT SLA SET UP (UAT SLA SET UP)	*RECHARG* By Agreed Date work Chargeable work...		5 - BY AGREED DATE	Tue 15/04/2025	91 days left	
15/04/2025	BIOQ/BU5H	719	SMALL ANIMAL RIDDELL SWANN	1748634	SMALL ANIMAL RIDDELL SWANN 01-1.F05		UAT SLA SET UP (UAT SLA SET UP)	Priority work Failure causing only moderate dis...		3 - PRIORITY	Tue 15/04/2025	14 days left	
15/04/2025	BIOQ/BU5H	784	LARGE ANIMAL RES&IMAG CTRE	1748633	LARGE ANIMAL RES&IMAG CTRE 00-G.009		UAT SLA SET UP (UAT SLA SET UP)	Urgent Work Failure causing serious disruption to operations		2 - URGENT	Tue 15/04/2025	14 days left	

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

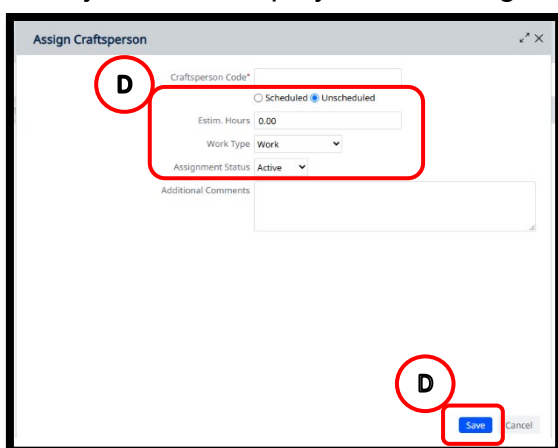
Expand the Craftsperson section and select the **(B) Assign Craftsperson** option.



The screenshot shows the 'Schedule Work Request 1748635' screen. The 'Craftspersons' section is expanded, and the 'Assign Craftsperson' button is circled in red and labeled with a red 'B'. The screen also shows 'Trades' and 'Tools' sections.

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

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



The screenshot shows the 'Assign Craftsperson' pop up screen. The 'Unscheduled' radio button is selected and circled in red, labeled with a red 'D'. The 'Work Type' dropdown is set to 'Work' and circled in red. The 'Assignment Status' is set to 'Active'. The 'Save' button is circled in red and labeled with a red 'D'.

Ensure the **(D) Unscheduled** option is selected, the Work Type is Work and the Assignment Status is Active.

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

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

Or

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

A screenshot of the 'Craftsperson Code' field in a form. The field contains the letter 'A'. A dropdown menu is open, displaying a list of names: AARON WILSON, ABDELKADER BEKKI, AFM, AGA WYSOCKA, AGENCY JOINER, ALAN ANDERSON, ALAN BROWN, ALAN CARRACHER, ALEX LUETCHFORD, and ALEX MCCALLUM.

A screenshot of the 'Craftsperson Code' field. The field is empty. To the right of the field, there is a red circle containing the letter 'E' and a red rectangle containing three dots '...', indicating an additional option or menu.

Selecting **(E)** option will provide a further **Select Value - Craftsperson** pop up screen, with details of all available entries for that field. You can scroll through the options or use the search bars at the top to find the craftsperson you wish to assign.

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

A screenshot of the 'Select Value - Craftsperson' pop-up screen. It shows a table with two columns: 'Craftsperson Code' and 'Primary Trade'. The table lists various craftspersons and their associated trades. At the bottom, there are 'Close' and 'Add New' buttons.

Craftsperson Code	Primary Trade
AARON WILSON	COMPLIANCE GROUP
ABDELKADER BEKKI	SEMI SKILLED
AFM	ADMINISTRATION
AGA WYSOCKA	ADMINISTRATION
AGENCY JOINER	JOINER
ALAN ANDERSON	ELECTRICIAN
ALAN BROWN	JOINER
ALAN CARRACHER	TECHNICAL SERV
ALEX LUETCHFORD	HELPDESK
ALEX MCCALLUM	CONTRACT SERV
ALIQA ZADROGA	ADMINISTRATION
AMY MARTIN	ADMINISTRATION

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

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

A screenshot of the 'Assign Craftsperson' screen. The 'Craftsperson Code' field is populated with 'AGENCY JOINER'. Below it, there are radio buttons for 'Scheduled' and 'Unscheduled', with 'Unscheduled' selected. Other fields include 'Estim. Hours' (0.00), 'Work Type' (Work), 'Assignment Status' (Active), and 'Additional Comments'. At the bottom right, there is a red circle containing the letter 'F' and a red rectangle containing the 'Save' button.

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

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

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

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

Depending on the job type, you may wish to assign more than one person to the work request. Repeat the above steps to add further Craftsperson and the display will add each craftsperson.

Craftsperson	Date Scheduled	Time Scheduled	Estim. Hours	Regular Hours	Doubletime Hours	Overtime Hours	Assignment Status	Additional Comments
AGENCY JOINER			0.00	0.00	0.00	0.00	Active	
UAT USER	15/04/2025	20:46	0.00	0.00	0.00	0.00	Active	

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

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

The system also allows you to assign the same craftspersons to be applied to a group of work requests.

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

Date Work Requested	Site	Building	Building Name	Work Request	Location (Name)	Actions
15/04/2025	BIOQ/BUSH	781	ROSLIN INSTITUTE	1748635	ROSLIN INSTITUTE 01-1.001A	[J] [K] [Icons]
15/04/2025	BIOQ/BUSH	719	SMALL ANIMAL RIDDELL SWANN	1748634	SMALL ANIMAL RIDDELL SWANN 01-1.F05	[Icons]
15/04/2025	BIOQ/BUSH	784	LARGE ANIMAL RES&IMAG CTRE	1748633	LARGE ANIMAL RES&IMAG CTRE 00-G.009	[Icons]

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

The schedule work request pop up screen will appear allowing you to repeat the previous steps to assign a craftsman to all of the selected work requests.

1.7 Issuing The Work Request to The Craftsperson

Once you have assigned the required Craftspeople to a work request, the system will display a **(A) Blue Dot** next to the Scheduled option on the **Maintenance Console screen**.

Date Work Requested	Site	Building	Building Name	Work Request	Location (Name)	Actions
Assigned to Work Order (9751) v						
15/04/2025	BIOQ/BUSH	781	ROSILN INSTITUTE	1748635	ROSILN INSTITUTE 01-1.001A	<div> <div>A</div> <div></div> <div>B</div> </div>

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

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

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

The status of the work request will also update to **Issued and in Progress**.

Issue Work Request 1748635

This action issues the request to the field personnel, at which point it cannot be canceled, only completed, put on hold, or stopped.

C

Yes

No

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

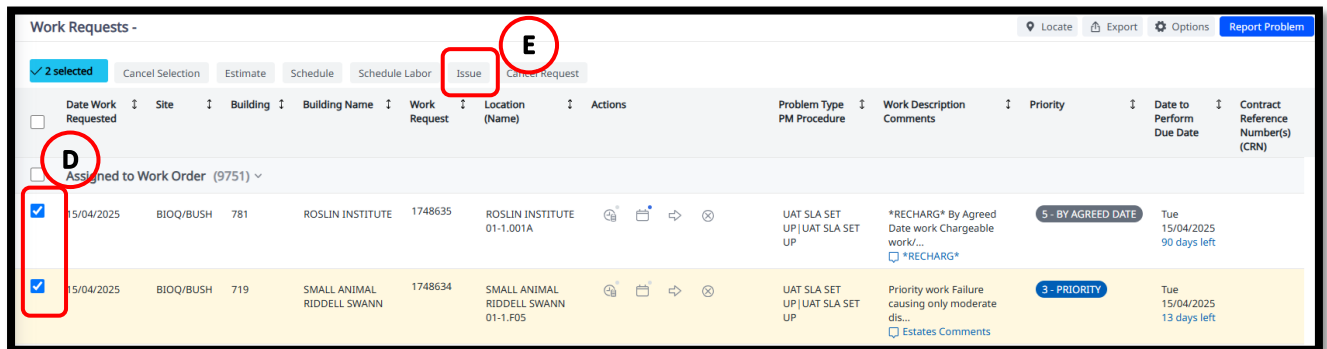
For all other work teams this indicates work is in hand and will now also allow a purchase requisition to be raised against the work request (in People and Money) if required.

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

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

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

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

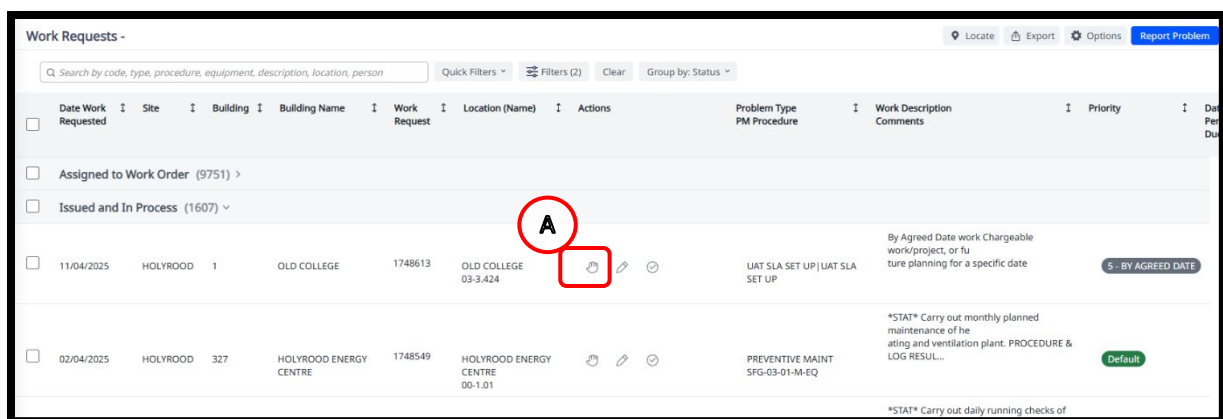


An **(E) Issue** option will appear at the top of the screen, that will allow you to issue the selected group.

1.8 Placing A Work Request On Hold

If you are unable to complete the Work Request, you can select the **(A) Hold** option to place the work on hold. (Note: Comments should be added to explain action **see section 1.3.3 Viewing and Adding Comments**)

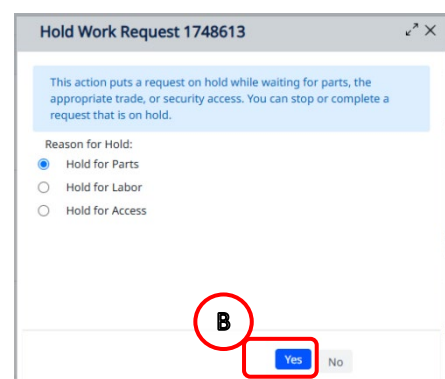
Maintenance Services **MUST** place a request On Hold for Parts before being able to raise a purchase requisition against the work request (in People and Money) if needed.



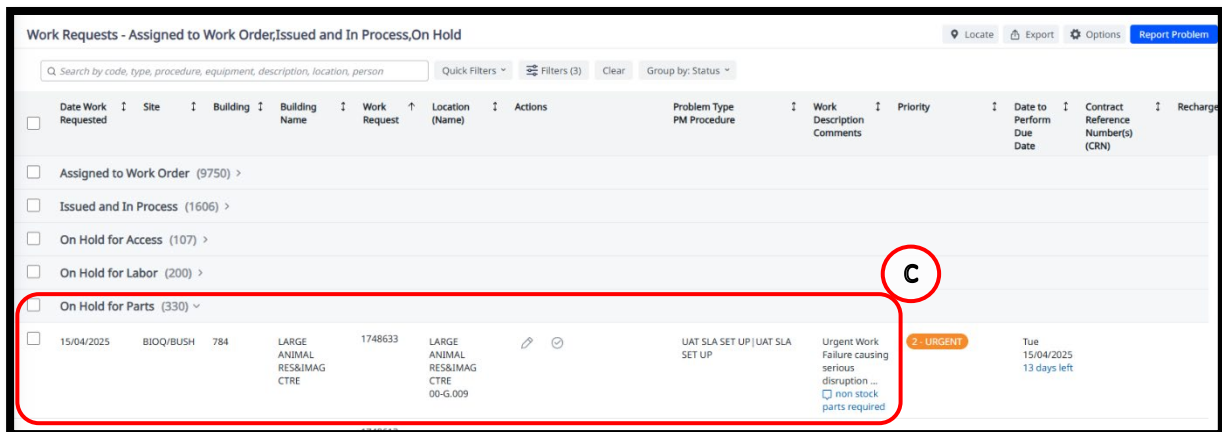
The system will display a Hold Work Request pop up screen, with 3 different options.



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

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



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



Date Work Requested	Site	Building	Building Name	Work Request	Location (Name)	Actions	Problem Type PM Procedure	Work Description Comments	Priority	Date to Perform Due Date	Contract Reference Number(s) (CRN)	Recharge
Assigned to Work Order (9750) >												
Issued and In Process (1606) >												
On Hold for Access (107) >												
On Hold for Labor (200) >												
On Hold for Parts (330) >												
15/04/2025	BIOQ/BUSH	784	LARGE ANIMAL RES&IMAG CTRE	1748633	LARGE ANIMAL RES&IMAG CTRE 00-G.009	 	UAT SLA SET UP UAT SLA SET UP	Urgent Work Failure causing serious disruption ... <input type="checkbox"/> non stock parts required	URGENT	Tue 15/04/2025 13 days left		

1.8.1 Maintenance Services On Hold Process

Maintenance Services require a dedicated process for managing work which cannot be progressed and needs to be placed On Hold. This ensures that updates from Craftspeople via mobile app are picked up by Planner/ATL/Foreman for action (see Mobile App User Guide for full details).

Where a Craftsperson identifies work to be put on hold, using mobile app they will update their work log to ensure hours are correctly captured. They will then create a new craftsperson assignment naming the MS Planner for their area, and set their own assignment record to complete. Steps to put the request On Hold include adding comments which should give clear instruction on what support is needed in order to progress the work.

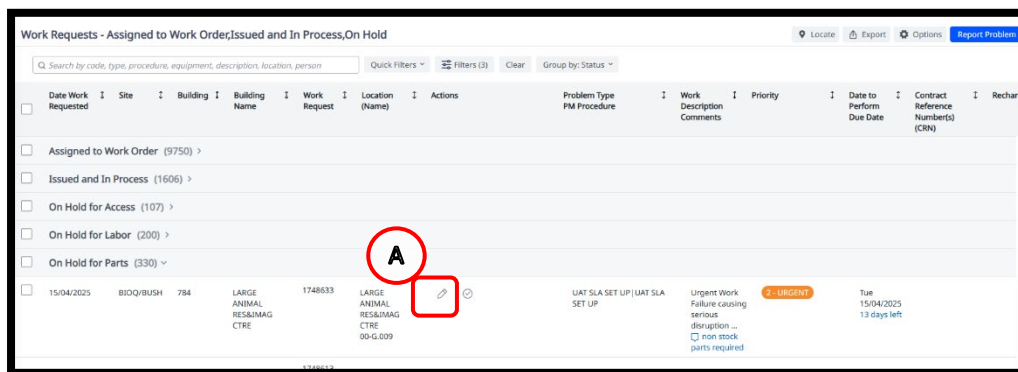
Once they sync the mobile app, these updates will push through to the console, and remove the work request from their mobile app.

The MS Planner will actively search for work requests where they are the assigned Craftsperson using filters (see [Appx A](#)), and review comments in order to take actions required (order parts/arrange access etc).

1.9 Resuming A Held Work Request

From the **Maintenance Console** screen, locate the specific work order you wish to resume. Clicking on the Work Request Reference will display the Work Request screen so you can check details of the work request and confirm it is the one you wish to resume.

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

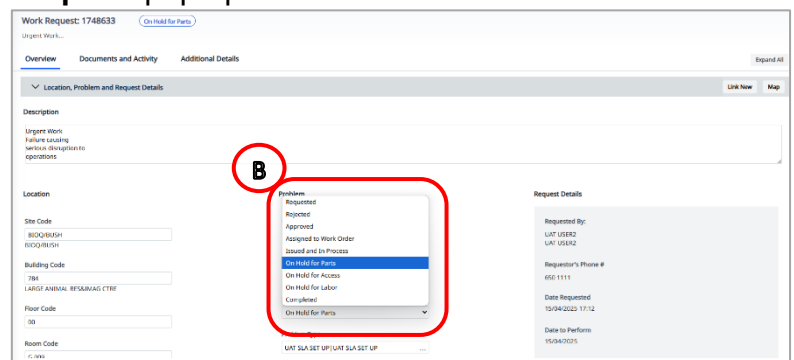


Date Work Requested	Site	Building	Building Name	Work Request	Location (Name)	Actions	Problem Type PM Procedure	Work Description Comments	Priority	Date to Perform Due Date	Contract Reference Number(s) (CRN)	Recharge
Assigned to Work Order (9750) >												
Issued and In Process (1606) >												
On Hold for Access (107) >												
On Hold for Labor (200) >												
On Hold for Parts (330) >												
15/04/2023	BIOQ/BUSH	784	LARGE ANIMAL RESAJMAG CTR	1748633	LARGE ANIMAL RESAJMAG CTR 90-G-009	A	UAT SLA SET UP UAT SLA SET UP	Urgent Work Failure causing serious disruption ... non stock parts required	2 - URGENT	Tue 15/04/2023 13 days left		

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

On the **Location, Problem and Request Details** section under **Overview**, the **(B) Status** will show the current hold option. Click on this drop-down and select the **Issued and In Progress** option.

When you are satisfied with the selected option **Save** changes.



Work Request: 1748633 [On Hold for Parts](#)

Urgent Work...

Overview Documents and Activity Additional Details [Request ID](#)

Location, Problem and Request Details [Link New](#) [Map](#)

Description
Urgent Work Failure causing serious disruption to operations

Location
Site Code: BIOQ/BUSH
Building Code: 784
Floor Code: 90
Room Code: 90-G-009

Problem
Request
Approved
Assigned to Work Order
Issued and In Progress
B On Hold for Parts
On Hold for Access
On Hold for Labor
Completed
On Hold for Parts

Request Details
Requested By: UAT USER2
Requester's Phone #: 650 1111
Date Requested: 15/04/2023 17:12
Date to Perform: 15/04/2023

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

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

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

1.9.1 Maintenance Services Resuming a Held WR Process

Maintenance Services also need to ensure the work request is again visible to Craftspeople via the mobile app, so will need to repeat steps to Assign and Issue. Adding the Craftsperson to progress work, while also removing the MS Planner assignment.

1.10 Linking A Work Request (Follow on Work)

You can connect two or more related work requests together, by creating a second or third new Linked Request.

This feature can be used where a work request needs to be progressed by a different work team (e.g. Maintenance Services > Contract Services). This might be because the work cannot be completed by the original team (scale/expertise/complexity), or if there is an additional or consequential piece of work required which would be undertaken by another work team (e.g. Controls > Maintenance Services).

By creating a Linked Request from an existing work request, you can set a new priority timescale and/or problem type as needed.

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

Work Requests - Assigned to Work Order, Issued and In Process, On Hold

Q

Search by code, type, procedure, equipment, description, location, person

Quick Filters

Filters (3)

Clear

Group by: Status

Date Work Requested

Site

Building

Building Name

Work Request

Location (Name)

Actions

Problem Type PM Procedure

Work Description Comments

Priority

Date Per Du

Assigned to Work Order (9750)

Issued and In Process (1606)

02/04/2025

HOLYROOD

327

HOLYROOD ENERGY CENTRE

1748549

A

HOLYROOD ENERGY CENTRE 00-1.01

PREVENTIVE MAINT SFG-03-01-M-EQ

STAT Carry out monthly planned maintenance of heating and ventilation plant. PROCEDURE & LOG RESUL...

Default

29/03/2025

CENTRAL

210

ROBSON BUILDING

1748508

ROBSON BUILDING 06-

PREVENTIVE MAINT HE-D-001

STAT Carry out daily running checks of steam generator plant LOG RESULTS IN ZETASAFE Daily

Default

28/03/2025

BLOO/BUSH

781

ROSLIN INSTITUTE

1748029

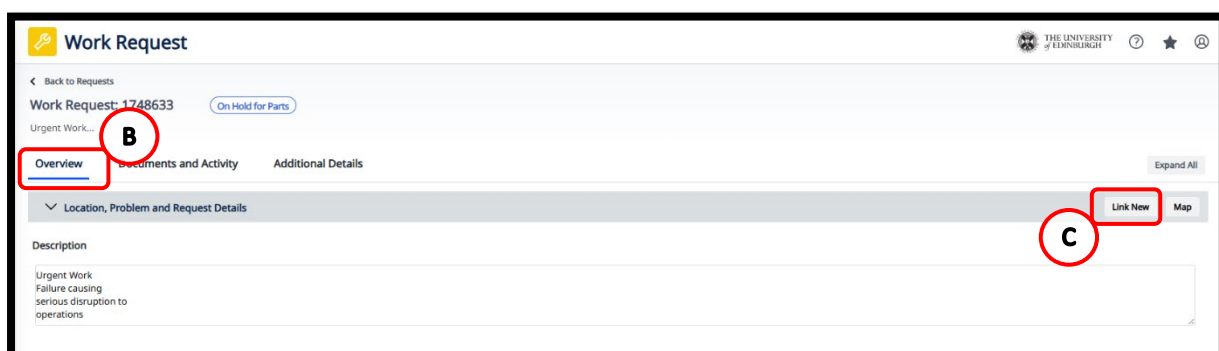
ROSLIN INSTITUTE

PREVENTIVE MAINT

STAT Carry out daily running checks of

Default

From **Overview** select **(C) Link New**.



Work Request

Work Request: 1748633 On Hold for Parts

Urgent Work...

Overview Documents and Activity Additional Details

Location, Problem and Request Details

Description

Urgent Work Failure causing serious disruption to operations

Link New Map

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

The parameters of the existing work request **Location** and **Problem Type** will pre-populate, however these can be changed if required. A full description of work required should be included, this should include what steps have already been taken along with any pictures to provide additional context.

Complete all details in same way as ([1.2 Raising a New Work Request](#)). Once you have finished completing the **Report Related Problem** form you should submit the request. The request will then arrive with the Estates Helpdesk for triage and approval and follow the normal workflow.

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

You can view a linked work request by selecting the work request code in the **(D) Linked Work Requests** field in the **Location, Problem and Request Details** section of the **Work Request** screen.

1.11 Updating a Work Request (Maintenance Services)

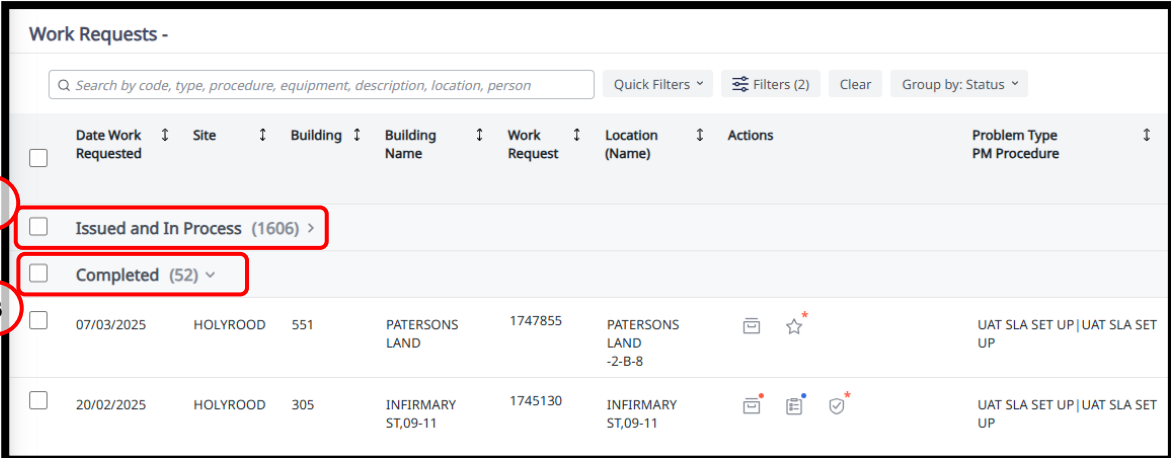
On occasion it will be necessary to update a work request on behalf of a craftsperson via the Maintenance Console. This may be due to issues encountered using the Mobile App.

Craftspeople are asked to update key information when using the Mobile App including Hours, parts and comments, if updating on behalf of a Craftsperson via the console it is important to still capture these.

1.11.1 Updating Attendance Details

When the craftsperson has undertaken the required work, they will normally complete the work request through the mobile application, recording their hours, stock parts used and comments.

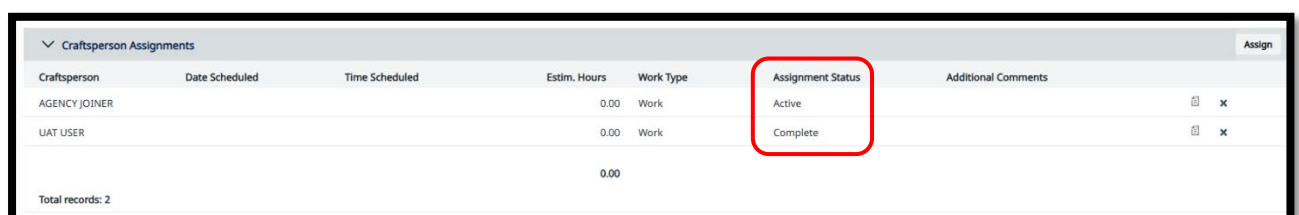
They will then sync their device to update the Maintenance Console. This step will move the work request from **(A) Issued and in Process** to status step **(B) Complete**



The screenshot shows the 'Work Requests' interface. At the top, there is a search bar and filter options. Below, a table lists work requests. Two status filters are highlighted with red circles and letters: (A) 'Issued and In Process (1606)' and (B) 'Completed (52)'. The table below shows two rows of work requests with columns for Date Work Requested, Site, Building, Building Name, Work Request, Location (Name), Actions, and Problem Type PM Procedure.

	Date Work Requested	Site	Building	Building Name	Work Request	Location (Name)	Actions	Problem Type PM Procedure
(A)	Issued and In Process (1606) >							
(B)	Completed (52) v							
	07/03/2025	HOLYROOD	551	PATERSONS LAND	1747855	PATERSONS LAND -2-B-8	[Icons]	UAT SLA SET UP UAT SLA SET UP
	20/02/2025	HOLYROOD	305	INFIRMARY ST,09-11	1745130	INFIRMARY ST,09-11	[Icons]	UAT SLA SET UP UAT SLA SET UP

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



The screenshot shows the 'Craftsperson Assignments' table. It has columns for Craftsperson, Date Scheduled, Time Scheduled, Estim. Hours, Work Type, Assignment Status, and Additional Comments. Two rows are shown: 'AGENCY JOINER' and 'UAT USER'. The 'Assignment Status' column for 'UAT USER' is highlighted with a red box, showing 'Active' and 'Complete' options.

Craftsperson	Date Scheduled	Time Scheduled	Estim. Hours	Work Type	Assignment Status	Additional Comments
AGENCY JOINER			0.00	Work	Active	[Icons]
UAT USER			0.00	Work	Complete	[Icons]

Total records: 2

To review/update details of the work request in order to complete on behalf of a craftsperson, access the **Work Request** screen.

The hours and date started are recorded in the **(C) Work Log** section under **Overview**. A new Log can be created by selecting the **(D) Add** option, this will open the **Log Work** screen and allow you to update relevant fields (craftsperson code, date started, hours**, and additional comments). You can also correct an existing work log by clicking on the record.

Work Request: 1747855
Completed

Overview Documents and Activity Additional Details

> Location, Problem and Request Details Link New Map

> Trades Add

> Craftsperson Assignments Assign

Craftsperson	Date Scheduled	Time Scheduled	Enter Hours	Work Type	Assignment Status	Additional Comments
AGENCY EDITOR			0.00	Work	Active	
UNIT USER			0.00	Work	Complete	
Total records: 2			0.00			

> Work Logs

Craftsperson	Date/Time Started	Date/Time Finished	Regular Hours	Overtime Hours	Doubletime Hours	Work Type	Additional Comments
UNIT USER	16/04/2025 08:00	16/04/2025 18:00	1.00	0.00	0.00	Work	Craftsperson comments on findings/action taken
Total records: 1			1.00	0.00	0.00		

Cancel Save

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

****Definition of hours:**

Regular Hours – time spent during normal working hours

Overtime Hours – time spent during agreed overtime or on call

Doubletime Hours – time spent during late notice overtime or in exceptional circumstances

(E)Additional Comments should be used to capture a brief description of findings/work carried out per attendance.

(Note: All comments are visible to the Requester and other Archibus users, and can be a valuable source of information)

Log Work

Craftsperson Code*

Date Started

Time Started

Date Finished

Time Finished

Regular Hours 0.00

Overtime Hours 0.00

Doubletime Hours 0.00

Work Type Work

Assignment Status Active

Additional Comments

Save Cancel


1.11.2 Updating Parts

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.

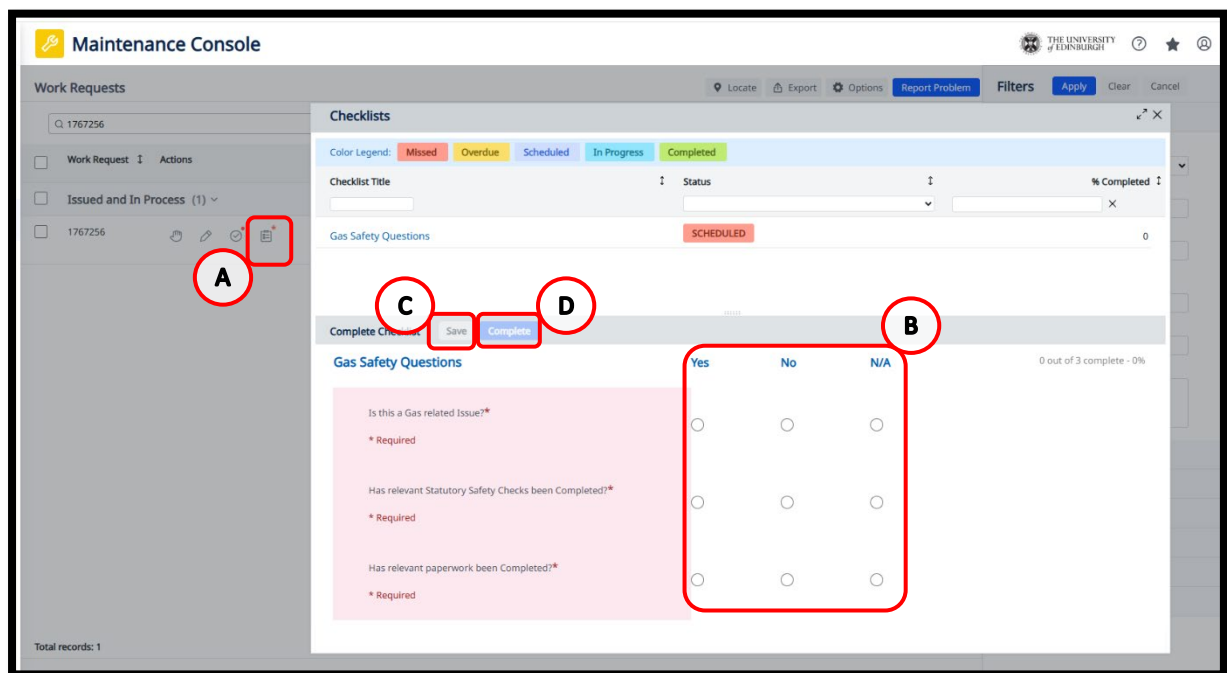
1.11.3 Checklists

In some instances, there will be a checklist to complete before the work request can be completed. These are currently limited to HEATING ENGINEER | GAS problem types.

Checklists are mandatory and therefor must be completed before the work request can be set to Completed status, and identifiable by the  icon.

To complete a checklist, click on the **(A) icon** which will open the checklist question box.

Capture responses to each question by selecting the **(B) radio button** under the required response, if you are unable to fully complete the form you can **(C) Save** and return later to finish. Once all questions have been answered you will be able to **(D) Complete**.



The screenshot shows the 'Maintenance Console' interface. On the left, the 'Work Requests' sidebar lists a request with ID 1767256. A red box labeled 'A' highlights the checklist icon next to this request. The main panel displays a 'Checklists' pop-up window. At the top of the pop-up is a 'Color Legend' with categories: Missed (red), Overdue (orange), Scheduled (yellow), In Progress (blue), and Completed (green). Below this is a 'Checklist Title' field and a 'Status' dropdown menu. The main content area of the pop-up is titled 'Gas Safety Questions' and shows a table with three columns: 'Yes', 'No', and 'N/A'. The table contains three rows of questions, each with a radio button for 'Yes', 'No', or 'N/A'. The 'Complete' button is circled in red, and the 'Save' button is also circled in red. The 'Work Requests' sidebar shows a list of requests, with the first one circled in red.

This will close the Checklist pop-up, store your responses and allow the work request to be completed.

1.12 Completing a Work Request

From the **Maintenance Console** screen, locate the specific work request you wish to complete. See [Appx A](#) for how to use filters.

It is recommended that you review the details of the work request and update comments and upload any relevant documents before completing.

There are two ways to complete a work request

- i) Open the Work Request screen by clicking on the work request number. On the **Location, Problem and Request Details** section use the **Status** drop down to select **(A) Complete**. Then select **(B) Save**.

Work Request: 1747909 Issued and In Process

22/03/25 UAT EM

Overview Documents and Activity Additional Details Expand All

Location, Problem and Request Details Link New Map

Description

22/03/25 UAT EM

Location

Site Code
HOLYROOD
HOLYROOD

Building Code
305
INFIRMARY ST,09-11

Floor Code
00

Room Code
00/00/00

Problem

- Requested
- Rejected
- Approved
- Assigned to Work Order
- Issued and In Process
- On Hold for Parts
- On Hold for Access
- On Hold for Labor
- Completed**
- Issued and In Process

Problem Type
UAT SLA SET UP | UAT SLA SET UP

Request Details

Requested By:
FIONA ADAMS(171387)
CARR, FIONA

Date Requested
22/03/2025 9:29

Date to Perform
22/03/2025 9:29

Due Date
27/06/2025

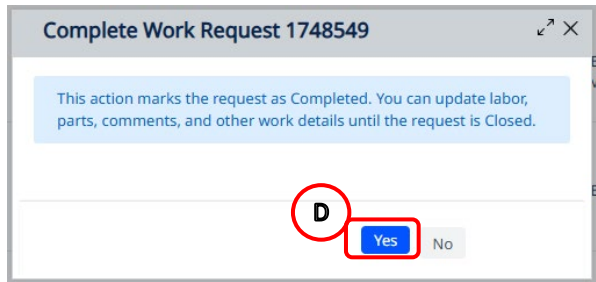
Cancel **Save** Forward Request

Or

- ii) Use the **(C) Complete** icon on the Maintenance Console

<input type="checkbox"/>	Issued and In Process (1606) ▾								
<input type="checkbox"/>	02/04/2025	HOLYROOD	327	HOLYROOD ENERGY CENTRE	1748549	HOLYROOD ENERGY CENTRE 00-1.01			
<input type="checkbox"/>	29/03/2025	CENTRAL	210	ROBSON BUILDING	1748508	ROBSON BUILDING 06-			
<input type="checkbox"/>	28/03/2025	BICO/BUSH	781	ROSLIN INSTITUTE	1748029	ROSLIN INSTITUTE			

The system will display a warning pop up screen. Labour hours are only captured by Maintenance Craftspeople, if you are happy that no hours are needed, select the **(D) Yes** option.



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

The system will complete the Work Request and move it to the **Completed** status section on the Maintenance Console screen pending **(E) Verification**. Note PPM work requests do not require verification.

Completed (51) ▾							
<input type="checkbox"/>	02/04/2025	HOLYROOD	327	HOLYROOD ENERGY CENTRE	1748549	HOLYROOD ENERGY CENTRE 00-1.01	PREVENTIVE MAINT SFG-03-01-M-EQ
<input type="checkbox"/>	07/03/2025	HOLYROOD	551	PATERSONS LAND	1747855	PATERSONS LAND -2-B-8	UAT SLA SET UP UAT SLA SET UP

1.13 Verifying a WR

When satisfied the Work Request has been completed with the correct information recorded, you need to complete the **Verify** step.

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

Completed (51) ▾							
<input type="checkbox"/>	02/04/2025	HOLYROOD	327	HOLYROOD ENERGY CENTRE	1748549	HOLYROOD ENERGY CENTRE 00-1.01	PREVENTIVE MAINT SFG-03-01-M-EQ
<input type="checkbox"/>	07/03/2025	HOLYROOD	551	PATERSONS LAND	1747855	PATERSONS LAND -2-B-8	UAT SLA SET UP UAT SLA SET UP

Select **(A) Verify** icon and the **Verify Work Request** pop up screen displays.

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

If the information is incomplete or the job has not been finished you can select **(D) Return Incomplete**.

This will change work request status back to Issued, you should then confirm the Craftperson assignment status is active.

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

1.14 Cancelling a Reactive Work Request

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

However, if a request has been issued and any actions taken it is important to Complete these so that the effort is correctly captured.

Date Work Requested	Site	Building	Building Name	Work Request	Location (Name)	Actions	Problem Type
15/04/2025	BIOQ/BUSH	781	ROSLIN INSTITUTE	1748635	ROSLIN INSTITUTE 01-1.001A	[Cancel] [Assign] [Move] [Archive]	UAT SLA SET UP UAT SLA SET UP
15/04/2025	BIOQ/BUSH	719	SMALL ANIMAL RIDDELL SWANN	1748634	SMALL ANIMAL RIDDELL SWANN 01-1.F05	[Cancel] [Assign] [Move] [Archive]	UAT SLA SET UP UAT SLA SET UP

Once the WR is at Assigned Status clicking on **(A) CANCEL** will present the Cancel Work Request pop up screen. This is asking for confirmation that you wish to cancel the request. Selecting **(B) Yes** will cancel the request and immediately archives it, so it is important to ensure **all comments** are updated **before** cancelling.

(NOTE: Selecting **(C) No** will return you to the Maintenance Console with no changes made.)

1.14.1 Maintenance Services Stopping a PPM Work Request

In some circumstances PPM Work Requests also need to be cancelled, however the reasons why also need to be captured for reporting purposes. This is done by adding a Cause Code. The option to add a **Cause Code** is only available once a request has reached the Issued and in Progress status, therefore some Maintenance staff (Area Team Leader/Maintenance Planner/Foreman) will have the **Work Team Supervisor-Stop** Role which will allow them to Stop a work request from Issued status.

The screenshot shows the 'Work Request: 1748632' screen in the 'Requested' state. The 'Overview' tab is active, showing fields for Site Code, Building Code, Floor Code, Room Code, Problem Location, Latitude, Longitude, and Contract Reference Number(s) (CRN). The 'Priority' section has radio buttons for 1 - EMERGENCY, 2 - URGENT, 3 - PRIORITY, 4 - ROUTINE, and 5 - BY AGREED DATE. The 'Status' dropdown is set to 'Requested'. The 'Problem Type' is 'UAT SLA SET UP | UAT SLA SET UP'. The 'Cause Code' field is highlighted with a red box and a circled 'A'. Below it is the 'Craftsperson's Note' section with an 'Add Problem Resolution Code' button. The 'Equipment Code' field is at the bottom. The right sidebar shows 'Requested By: UAT USER', 'Requestor's Phone #: 650 6666', 'Date Requested: 15/04/2025 7:46', 'Date to Perform: 15/04/2025 7:46', 'Due Date: 27/05/2025', and 'Workflow' information.

To add a **(A) Cause Code**, open the Work Request screen. The Cause Code field is found in **Location, Problem and Request Details** section under **Overview**. Click on the icon to open the Select Value screen and select the appropriate code. This will return you to the Work Request screen, select Save.

Once you have updated the Cause Code and any comments, you can now select the Stop icon on the Maintenance Console screen. This will stop the work request which cannot be reversed and will archive overnight.

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

1. Work Request requires to be Issued (in order that the Cause Code is available for selection)
2. Select Cause Code for reason WR has been Stopped – see below for list of Cause Codes
3. Stop Work Request

Work Requests already at Issued status which have to be cancelled should be checked to see if there are any Craftspersons Assignments and Work Logs.

For Work Requests which have Craftsperson assigned but no Work Log these can be Stopped as above.

For Work Requests which have Craftsperson assigned, and activity captured in a Work Log, these should **not be stopped** but instead completed so that the effort is correctly reflected in reporting.

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

Reactive Work Requests should not be cancelled after being issued.

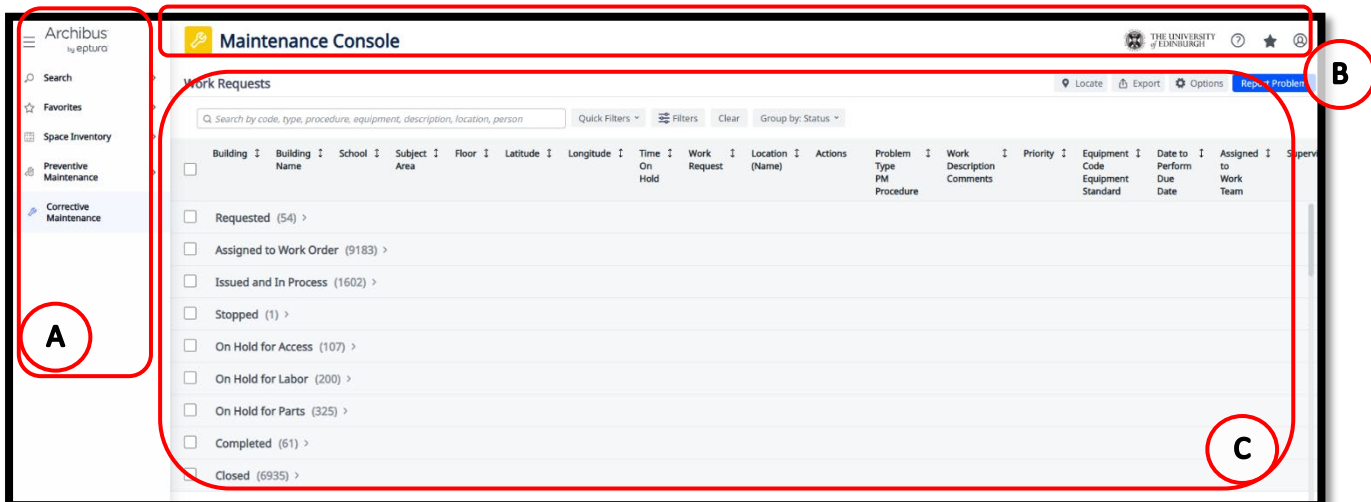
1.15 Preventative Maintenance Work Requests

PM work requests are scheduled maintenance activities designed to prevent equipment failures and ensure optimal performance. These requests are generated based on predefined schedules and specifications and bypass the Approval step by Estates Helpdesk routing directly to the Work Teams responsible for completion.

APPENDIX A**2.0 Appx A: Navigating the Maintenance Console Screen****2.1 Maintenance Console Screen**

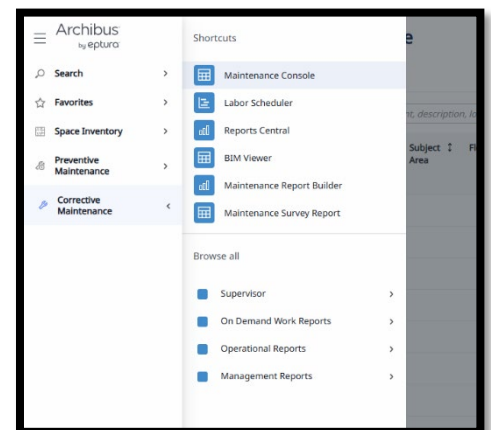
The Maintenance Console screen is split into three main sections:

- (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.

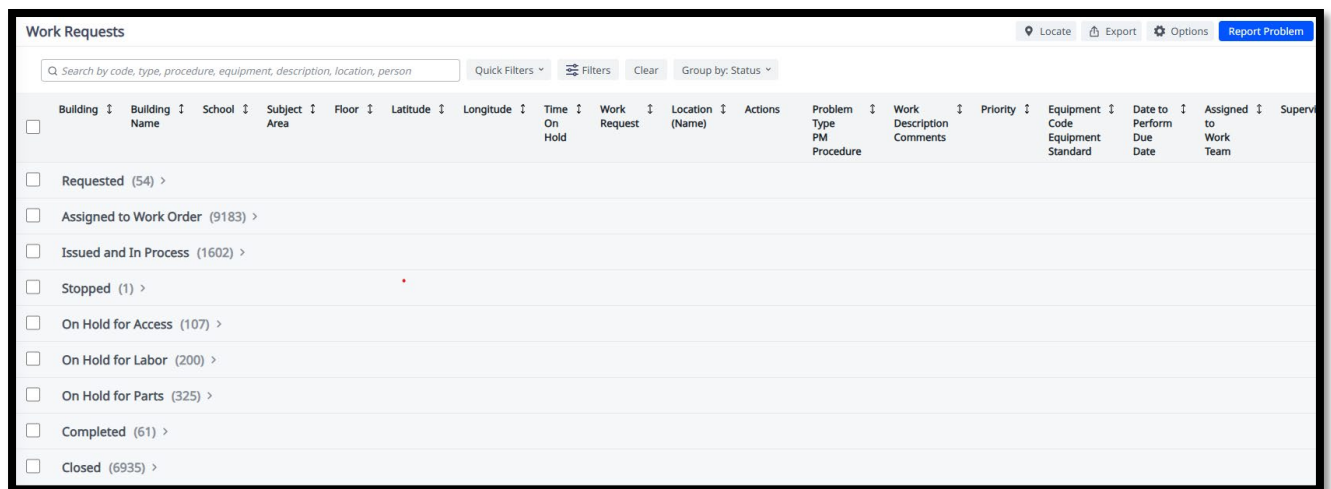


The work space will display a list of work requests available to you in line with your access role.

- 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.

Groups can be collapsed or opened by selecting the > icon.



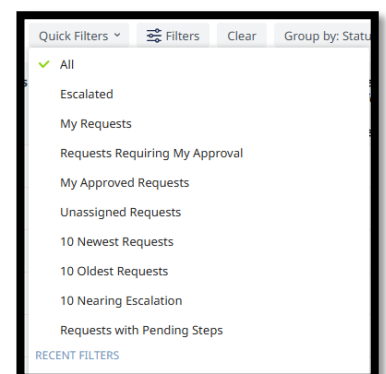
2.2 Using filters

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.



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.

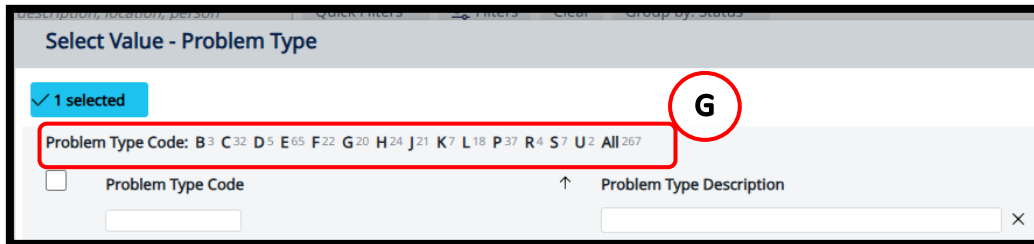
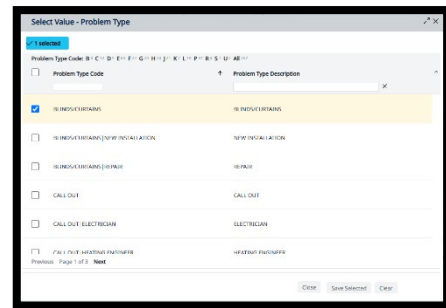
Selecting that option will provide a further **Select Value** pop up screen, with details of all available entries for that field.

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.

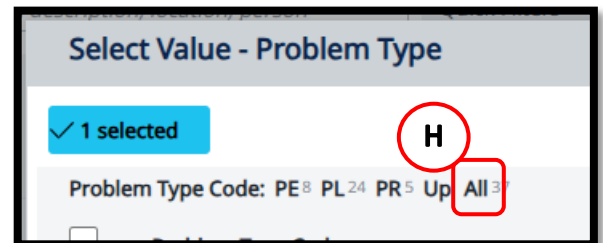
You can search on more than 1 item, by selecting one or more of the tick boxes to the left of an option.

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.



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

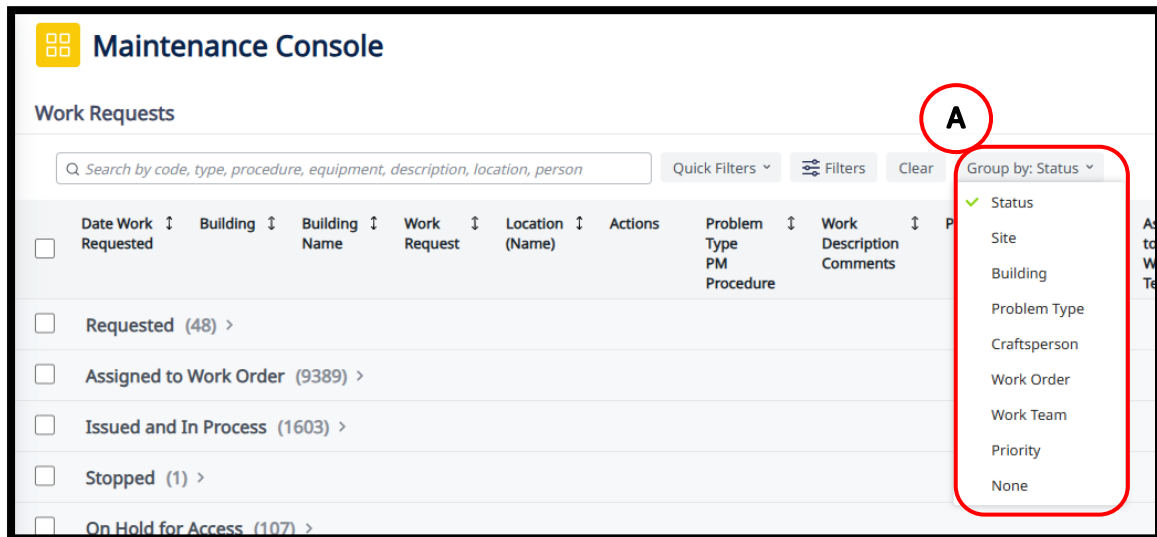


2.3 Using the Group By Option

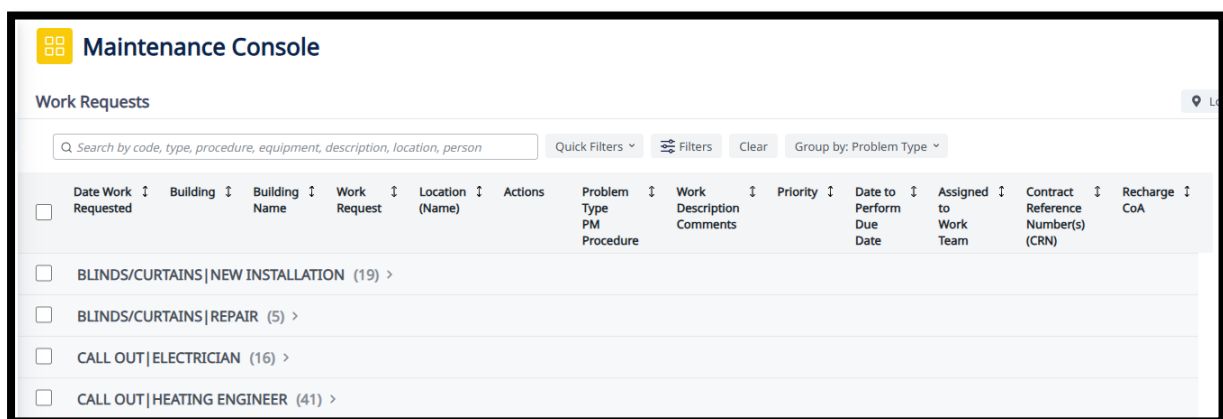
Having applied the necessary filters and the system has displayed the relevant work requests, you can also amend how the records are grouped.

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.



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

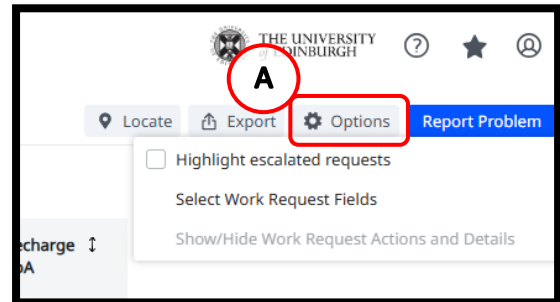


2.4 Amending Columns - Maintenances Console

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.

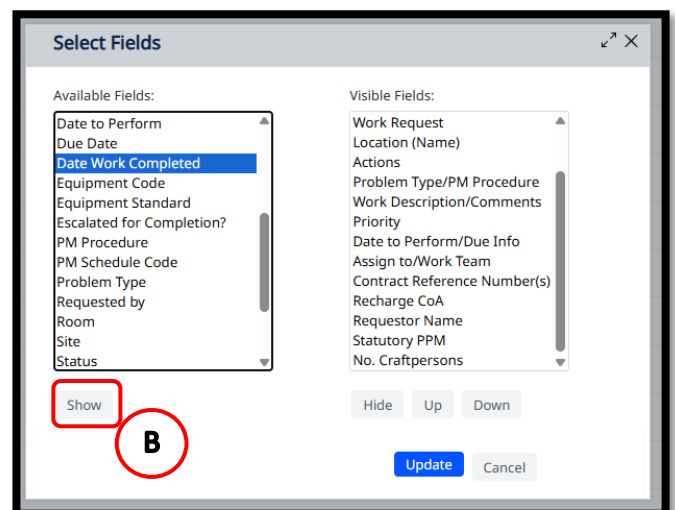
Selecting the **(A) Options** icon will display an option list, choose the **Select Work Request Fields** option.



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.

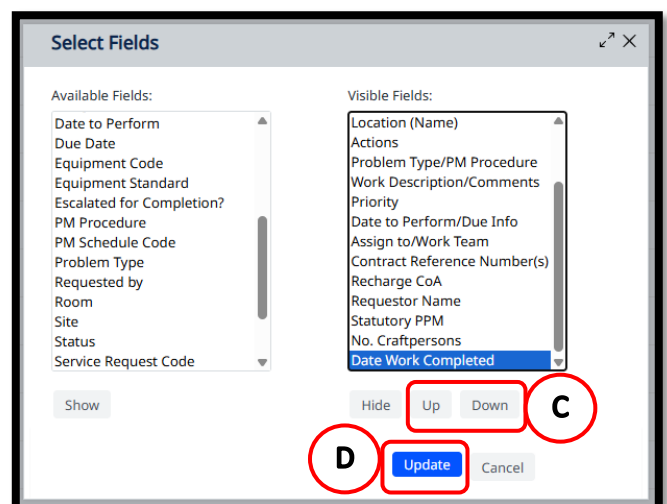
To add an item to your display, highlight it, then select the **(B) Show** option.



The selected item will move from the left-hand 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.



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 style="list-style-type: none">• Date Work Requested• Building Name• Work Request Code• Problem Type• Work Description• Priority• Due Date• Action buttons 1 – 5• Work Team Code• Requested By	<ul style="list-style-type: none">• Building Name• Work Request Code• Problem Type• Requested By• Work Description• Assigned To• Due Date• Action buttons 1 – 5• Escalated for Completion	<ul style="list-style-type: none">• Building Name• Work Request Code• Problem Type• Floor• Work Team Code• Assigned To• Date Work Requested• Due Date• Action buttons 1 – 5• Escalated for Completion

2.5 Processing Batched Work Requests

The system also allows the management of work requests to be carried out in batches or groups of work requests.

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

Maintenance Console

Work Requests

✓ 2 selected | Cancel Selection | Estimate | Schedule | Schedule Labor | Issue | Cancel Request

	Date Work Requested	Building	Building Name	Work Request	Location (Name)	Actions	Problem Type PM Procedure	Work Description Comments	Priority
<input type="checkbox"/>	Requested (48) >								
<input type="checkbox"/>	Assigned to Work Order (9751) v								
<input checked="" type="checkbox"/>	29/03/2025	795	EASTER BUSH ENERGY CENTRE	1748510	EASTER BUSH ENERGY CENTRE		PREVENTIVE MAINT C-HV-0001	*STAT* MONTHLY HV SUBSTATION INSPECTION PROCEDURE AND LOG RESULTS IN ZETASAFE	Default
<input checked="" type="checkbox"/>	29/03/2025	2715	IRR SOUTH	1748509	IRR SOUTH		PREVENTIVE MAINT HE-D-001	*STAT* Carry out daily running checks of steam generator plant LOG RESULTS IN ZETASAFE Daily	Default
<input type="checkbox"/>	29/03/2025	210	ROBSON BUILDING	1748508	ROBSON BUILDING 06-		PREVENTIVE MAINT HE-D-001	*STAT* Carry out daily running checks of steam generator plant LOG RESULTS IN ZETASAFE Daily	Default

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.

APPENDIX B**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 resolved	→	Issued	If completed in error/hold reason
Issued	→	Assigned	If issued in error
Assigned	→ amended	Requested	If priority/location/problem type needs

3.2 Useful 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 *H&V*	Work Request requires Fume Hood Maintenance attendance – arranged by 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

APPENDIX C**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.

On Demand Work Request Priority options:

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

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

APPENDIX D**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 ebisusers@ed.ac.uk 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 ebisusers@ed.ac.uk
- Help & Support with System issues (inc Mobile App)
 - Please contact Archibus System Support ebisusers@ed.ac.uk
- Help & Support with How to use
 - Fault Reporting - Contact Estates Helpdesk estates.helpdesk@ed.ac.uk or 0131 650 2494
 - Space – Contact Richard Mann Richard.Mann@ed.ac.uk
- Help & Support with Estates issues
 - Please contact Estates Helpdesk – estates.helpdesk@ed.ac.uk or 0131 650 2494