

User Guide

Web Central v2024.04

Customer

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

Foreword

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

System Support

If you require assistance to use the system, please contact Archibus.Support@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/schema/ab-core/views/navigator/ab-navigator.axvw>

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

Alternatively, you can navigate via MyEd >Staff Resources > Archibus Web Central

Estates Helpdesk

The Estates Helpdesk is open 8am – 6pm Monday-Friday, with Security dealing with emergencies out-with these times.

Contact details are as follows, telephone 0131 650 2494 or by email

estates.helpdesk@ed.ac.uk

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

Accessibility

If you require this document in an alternative format, please contact

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

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Document Version Control

Date	Owner	Version	Update
May 2025	Eileen Mullan	V2.0	Initial Version for Archibus 2024.04
July 2025	Eileen Mullan	V2.1	User feedback following Go Live
Aug 2025	Eileen Mullan	V2.2	Added section on exporting WRs
Oct 2025	Eileen Mullan	V2.3	Updated Contacts for Help and Support

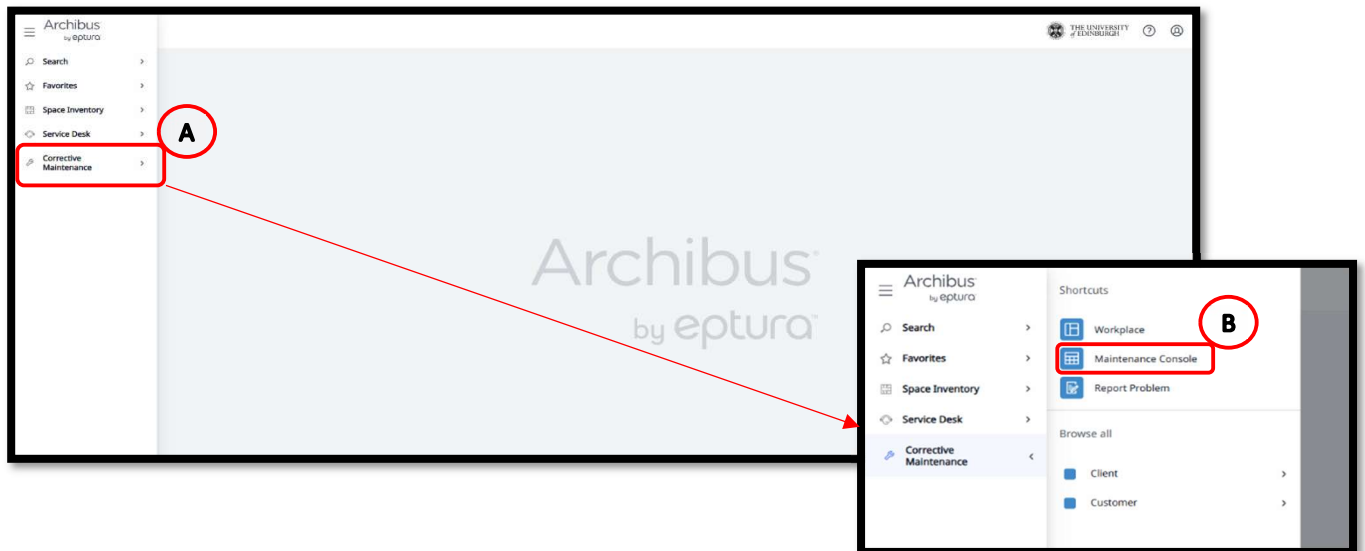
Purpose

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

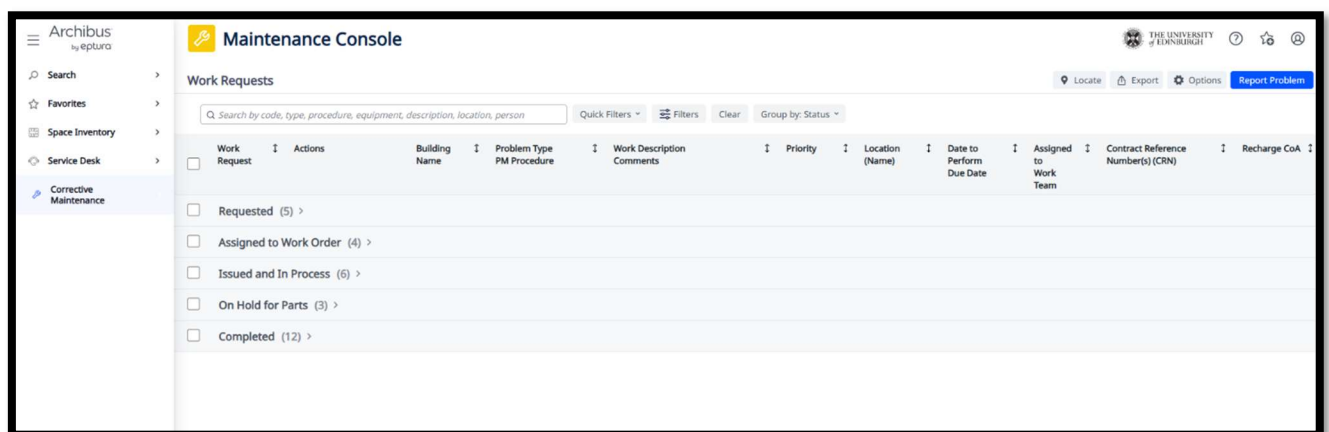
- Raising a Work Request
- Adding requestor details, location, problem and description details
- Reviewing a Work Request
- Completing a Customer Survey

Accessing the Maintenance Console

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



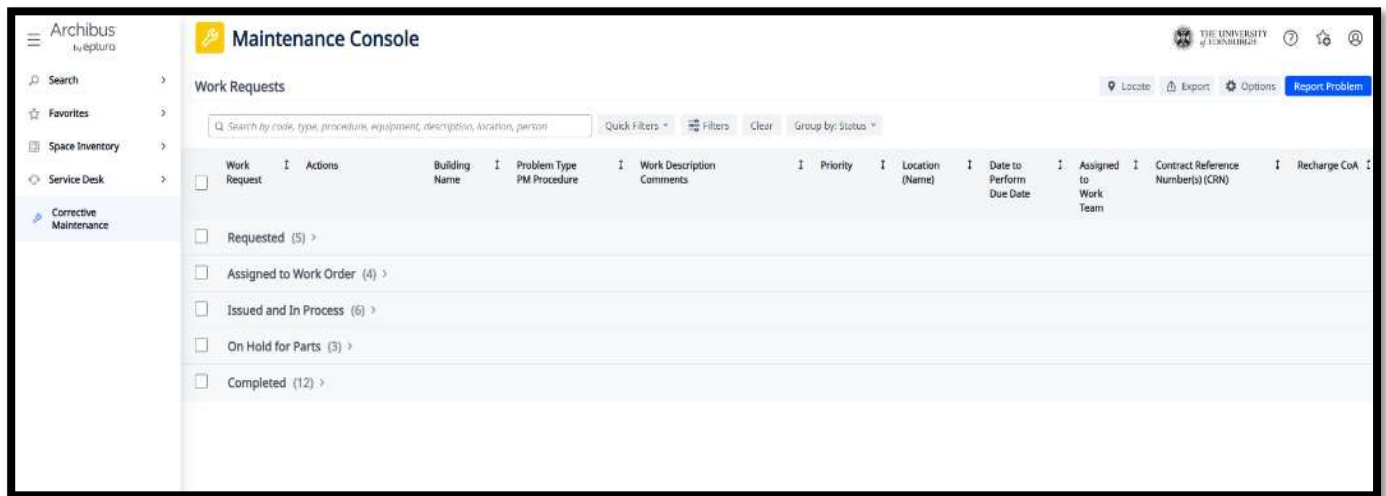
When you see the following screen, you will see a list of all open and recently completed Work Request which you have created. The Maintenance Console page groups Work Requests by status.



(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.

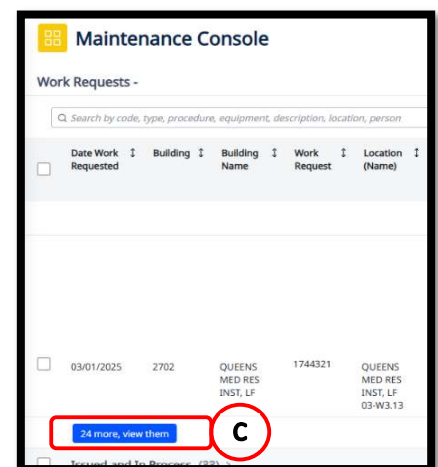
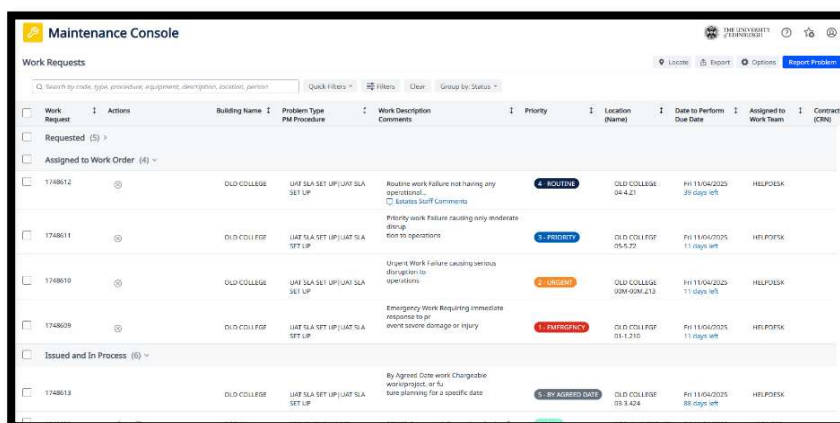


The following options will help to navigate the page:

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 Next 25** button.



1.1. 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

1.1.1. Requester Details

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

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

The screenshot shows the 'Report Problem' form. The 'Requestor' section is highlighted with a red box and labeled 'B'. It contains fields for 'Requested By*' (populated with 'UAT USER'), 'Requestor Phone' (populated with '650 6666'), and a 'Map' button. Below this is the 'Location' section with a checkbox 'Use your assigned workspace location' (checked), and fields for 'Location' (populated with 'HOLYROOD'), 'FLOOR' (populated with '1'), and 'ROOM'. There is also a 'Describe the location' field. The 'Problem' section has a 'Type of Problem' dropdown menu and a 'View All Problem Types' button. A note at the bottom states: 'The more precisely you specify your problem, the better we can route it to people who can help.'

1.1.2. 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.

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

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).

Report Problem

Requestor

Requested By* UAT USER
UAT USER

Requestor Phone 650 6665

Location

C ☒ Use your assigned workspace location

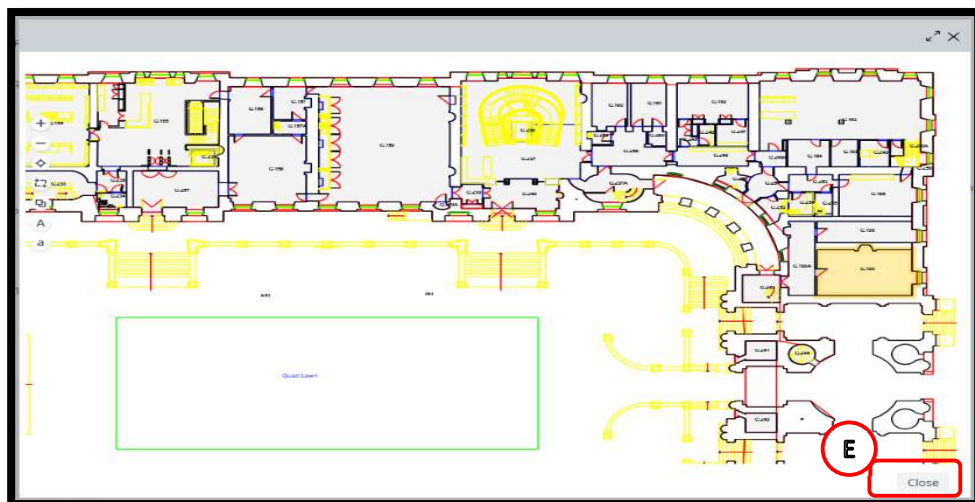
Location HOLYROOD 1 00 ROOM Drawing **D** Map

Describe the location

Enter in as much of the location information as you know. After selecting a floor, you may click the Drawing button to select the room from a floor plan drawing.

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

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



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 should **not** be used to provide additional location details; this should instead be captured in the description.

Details entered here will not show to Helpdesk staff Approving the work request, and as a result may be lost.

Report Problem

Requestor

Requested By* UAT USER
UAT USER

Requestor Phone 650 6665

Location

☒ Use your assigned workspace location

Location HOLYROOD 1 00 ROOM Drawing Map

F Describe the location
Enter in as much of the location information as you know. After selecting a floor, you may click the Drawing button to select the room from a floor plan drawing.
Enter the location specifically enough that maintenance can find it, such as "Problem is on back wall, below window."

1.2.3 Problem Details

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

There are 2 ways to add these details.

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

Select the most appropriate problem option for both fields.

The screenshot shows a form titled "Problem". It contains two dropdown menus. The first dropdown is labeled "A" and has the text "Type of Problem" next to it. The second dropdown is labeled "B" and is empty. Below the second dropdown is a button labeled "C" with the text "View All Problem Types". Below the button is a note: "The more precisely you specify your problem, the better we can route it to people who can help."

Or

The screenshot shows a pop-up window titled "Select Value - Problem Type". At the top, there is a search bar with the text "Problem Type Code: B 3 C 32 D 5 E 65 F 22 G 20 H 24 J 21 K 7 L 18 P 37 R 4 S 7 U 2 All 267". Below the search bar is a table with two columns: "Problem Type Code" and "Problem Type Description". The table lists various problem types, including "BLINDS/CURTAINS", "BLINDS/CURTAINS|NEW INSTALLATION", "BLINDS/CURTAINS|REPAIR", "CALL OUT", "CALL OUT|ELECTRICIAN", "CALL OUT|HEATING ENGINEER", "CALL OUT|JOINER", "CALL OUT|MANAGEMENT", "CALL OUT|PLUMBER", "CLEANING", "CLEANING|BLOOD", and "CLEANING|BROKEN GLASS". At the bottom of the table, there are navigation buttons: "Previous", "Page 1 of 3", and "Next". At the bottom right of the pop-up, there are "Close" and "Add New" buttons.

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

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

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

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

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

1.2.4 Description Details

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

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

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

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

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

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

Description

A

Description*

Select Description

B

Priority*

☒ 5 - By Agreed Date

☐ 4 - Routine

☐ 3 - Priority

☐ 2 - Urgent

☐ 1 - Emergency

Workflow

Response required within 10 Days

Completion required within 6 Months

Workflow Steps:

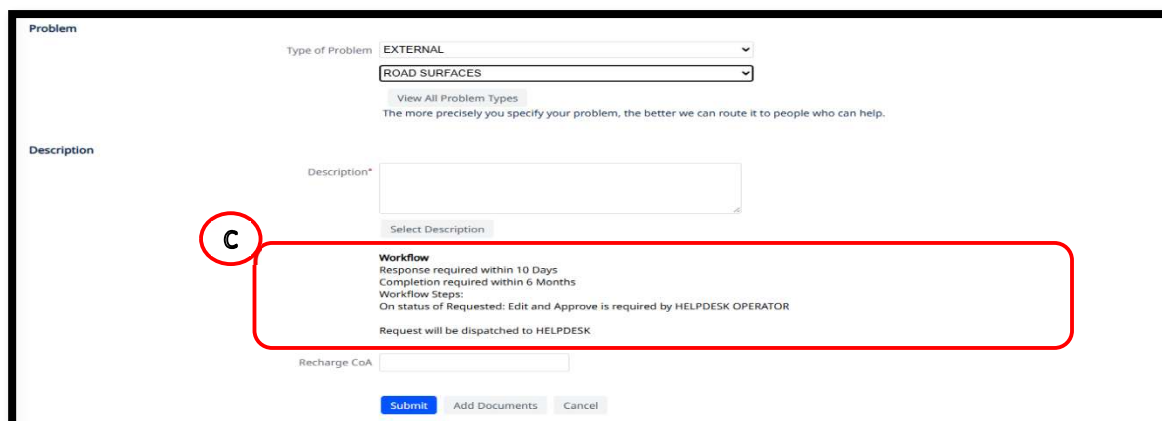
On status of Requested: Edit and Approve is required by HELPDESK OPERATOR

Request will be dispatched to HELPDESK

Recharge CoA

Submit Add Documents Cancel

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



Problem

Type of Problem: EXTERNAL
ROAD SURFACES

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

Description

Description*

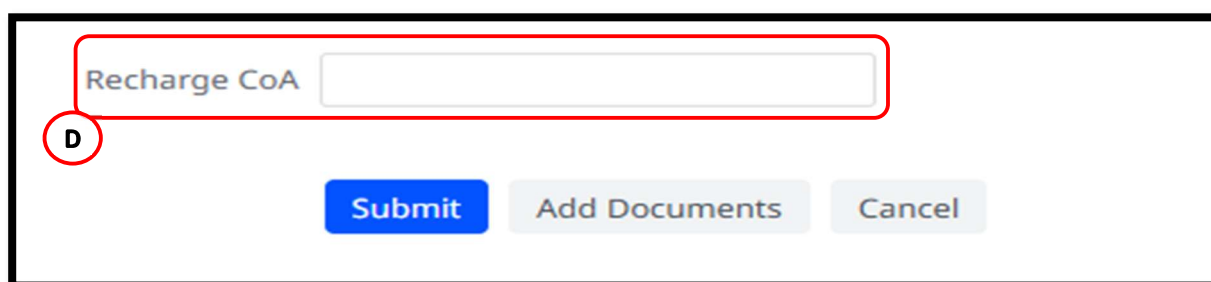
Select Description

Workflow
Response required within 10 Days
Completion required within 6 Months
Workflow Steps:
On status of Requested: Edit and Approve is required by HELPDISK OPERATOR
Request will be dispatched to HELPDISK

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

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.

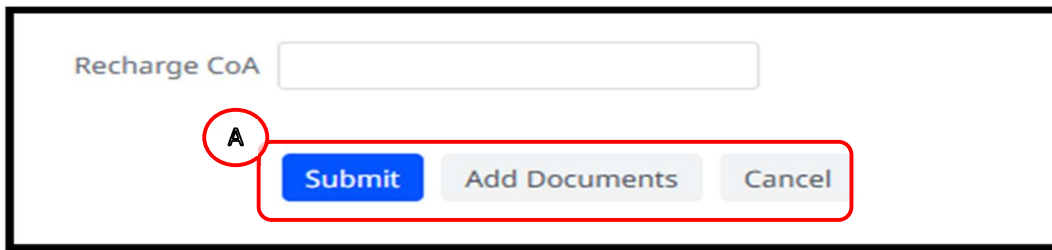
More information is contained in the Maintenance & Small Projects Service Guide - available at <http://www.estates.ed.ac.uk/helpdesk>

If you are submitting a request for work you know will be rechargeable, please complete the Recharge CoA field using the format from P&M e.g.

110.110002.150200001.2735.101061.00000000.00000000.000.000000.000000

1.2.5 Submitting A Work Request

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



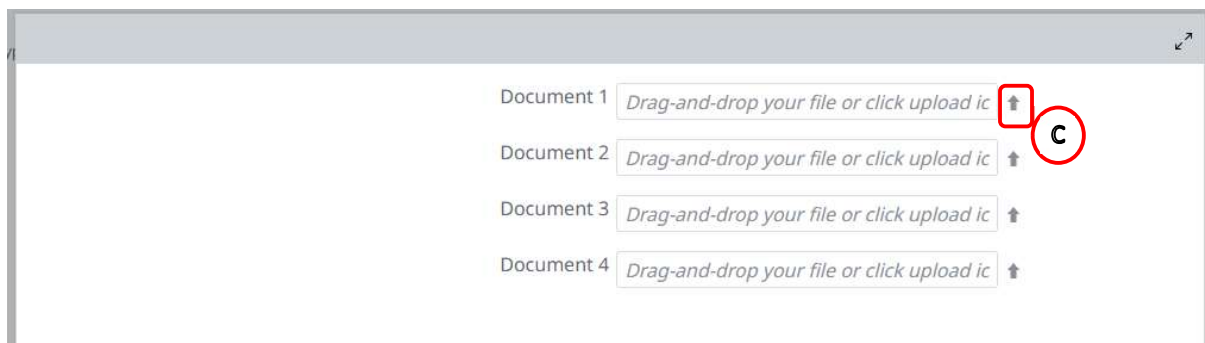
Recharge CoA

A

There are three **(A)** buttons –

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

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



Document 1 **C**

Document 2

Document 3

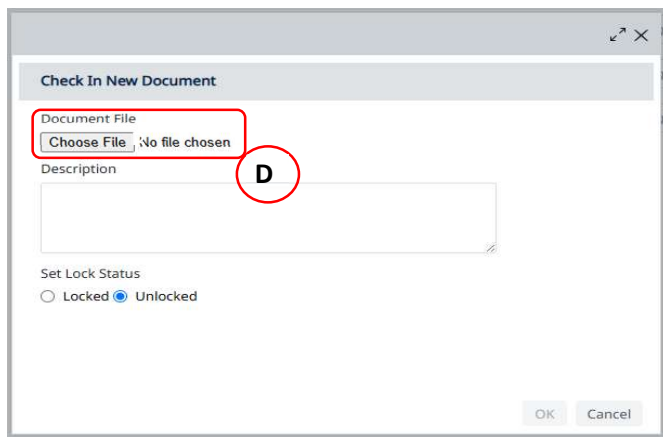
Document 4

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)

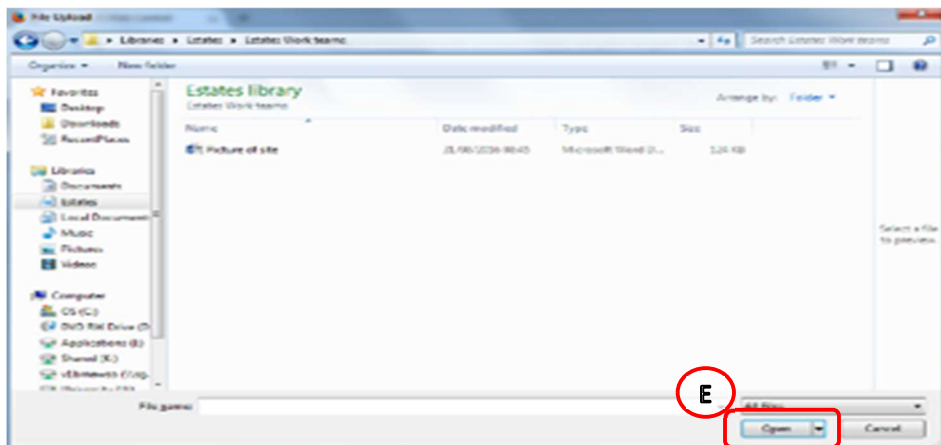
The system will display the **Check in New Document** pop up screen.

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



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

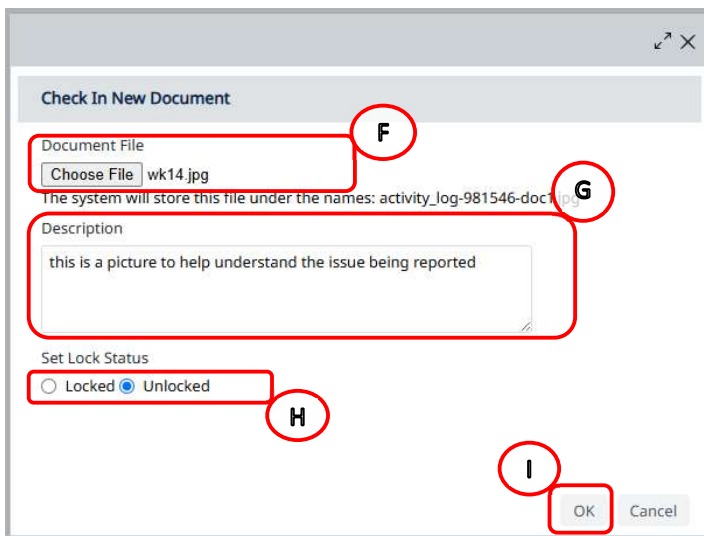
Navigate to the required file and either double click on it or select the **(E) Open** option.



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)

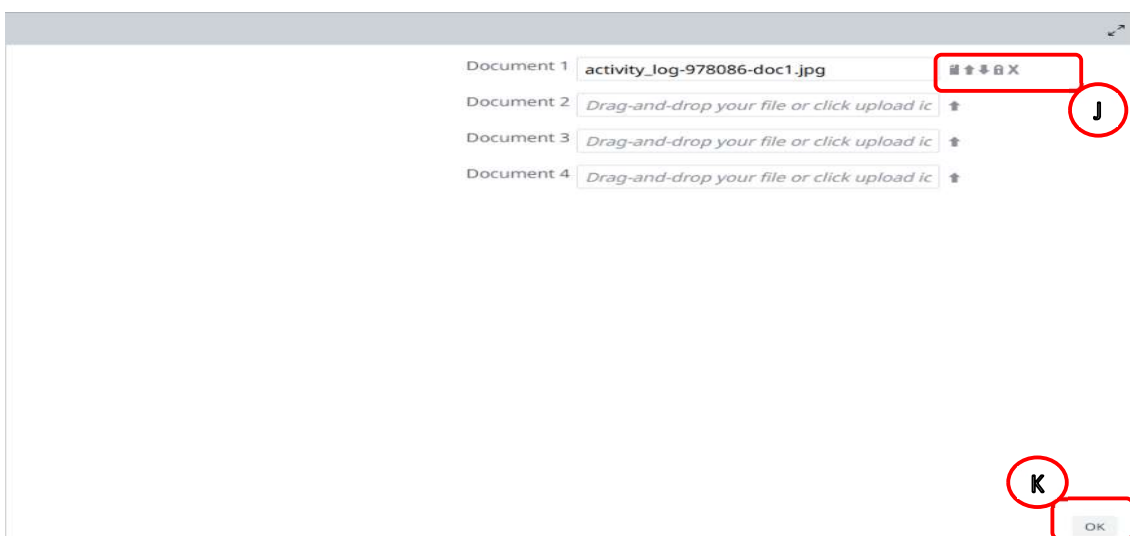
The **Check In New Document** pop up screen will now **(F)** display the file selected for **attaching** to the work request. It is important to add **(G)** a **Description** to help explain the nature of the attached document.



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.



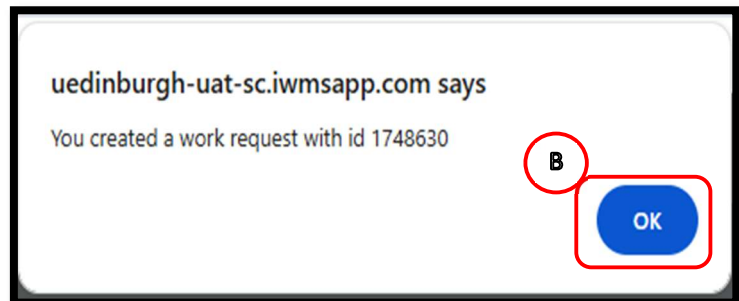
You can now use the **various icons (J)** to manage the attached document/picture. Hover your mouse over each icon to display each action Show/Check In/Check Out/Lock/Delete.

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.

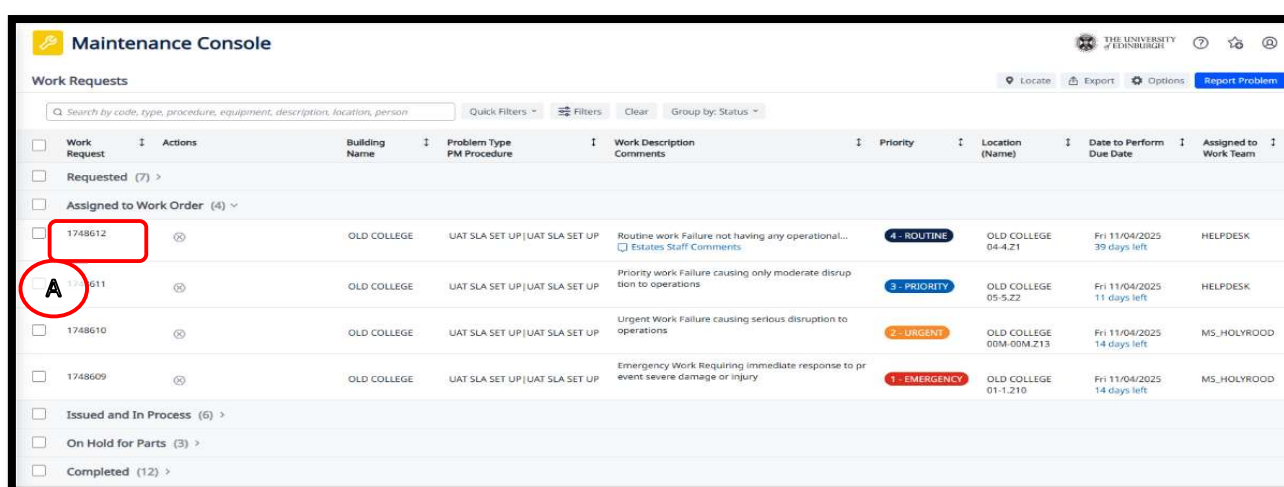


1.3 Reviewing a work request

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

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

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



Work Request	Actions	Building Name	Problem Type PM Procedure	Work Description Comments	Priority	Location (Name)	Date to Perform Due Date	Assigned to Work Team
☐ 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	HELPDESK
☐ A 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	HELPDESK
☐ 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) >								

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

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

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

This screen contains three sections:

Overview:

Work Request

Back to Requests

Work Request: 1748613 [On Hold for Access](#)

By Agreed Date work...

Overview Documents and Activity Additional Details [Expand All](#)

- > Location, Problem and Request Details [Link New](#) [Map](#)
- > Trades [Add](#)
- > Craftsperson Assignments [Assign](#)
- > Work Logs [Add](#)

(B) Location, Problem and Request Details Shows details of the work request captured on the **Report a Problem** screen including location, problem and requester details. You can also review **(C) Related Work Requests** if applicable.

Work Request

Back to Requests

Work Request: 1748613 [On Hold for Access](#)

By Agreed Date work...

Overview Documents and Activity Additional Details **B** [Expand All](#)

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

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

Problem

Priority

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

Status
On Hold for Access

Problem Type

Request Details

Requested By:
UAT USER
UAT USER

C
Linked Work Requests
1748631

Requestor's Phone #
650 5666

Date Requested
11/04/2025 14:56

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

Estates staff can create a link work request to generate a new work request, for example where a piece of work escalates from Maintenance Services to Contract Services. You can now view both requests using this link.

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

Overview							
Location, Problem and Request Details							
Trades							
Craftsperson Assignments							
Craftsperson	Date Scheduled	Time Scheduled	Estim. Hours	Work Type	Assignment Status	Additional Comments	
AGENCY JOINER			0.00	Work	Active		
Total records: 1							
Work Logs							
Craftsperson	Date/Time Started	Date/Time Finished	Regular Hours	Overtime Hours	Doubletime Hours	Work Type	Additional Comments
AGENCY JOINER	18/04/2025		4.00	0.00	0.00	Work	craftsperson comments
			4.00	0.00	0.00		

(D) **Trades** is currently not used.

(E) **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).

(F) **Work Logs** are where records of a 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)

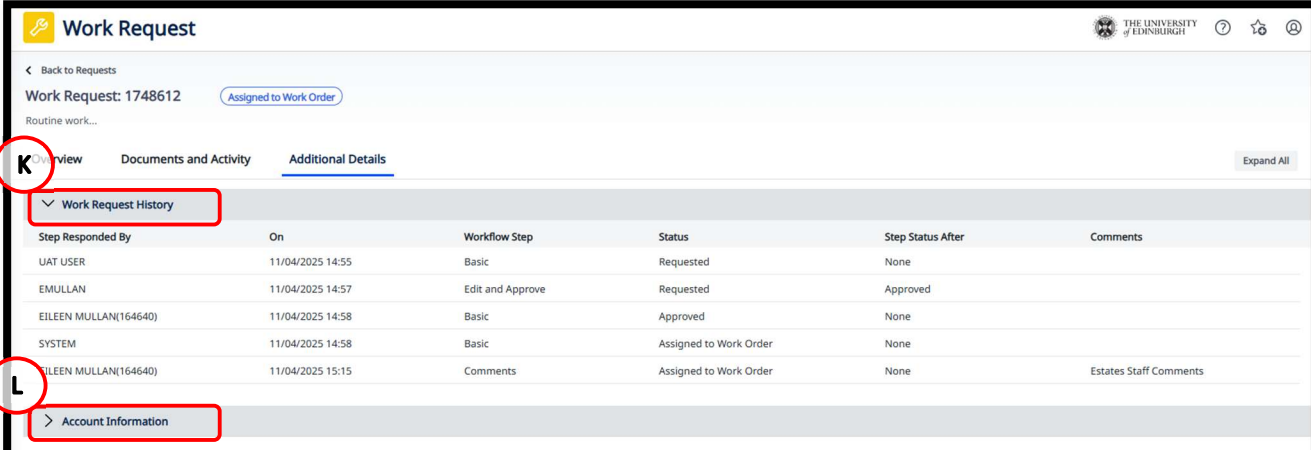
Work Request			
Back to Requests			
Work Request: 1748612			
Routine work...			
Overview Documents and Activity Additional Details			
Request Documents			
Document 1	wr-1748612-doc1.jpg	Document 2	Drag-and-drop your file or click upload icon
Document 3	Drag-and-drop your file or click upload icon	Floor Plan Redlines	Drag-and-drop your file or click upload icon
Additional Documents and Activity			Indicate on Drawing
Documents and comments added here can be viewed on Archibus OnSite.			Add Comments Add Document
Document	Activity	Date and Time Added	
	[EMULLAN] Approval Approved	11/04/2025 14:55	
	[UATUSER] changed the status to Requested	11/04/2025 14:55	
	[EMULLAN] changed the status to Approved	11/04/2025 14:58	
	[SYSTEM] changed the status to Assigned to Work Order	11/04/2025 14:58	
	[EMULLAN] Estates Staff Comments	11/04/2025 15:15	

Documents and Activity:

(G)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 **(H) Add Documents** option and follow steps described in [1.2.5](#)

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

Additional Details:



Work Request

Back to Requests

Work Request: 1748612 Assigned to Work Order

Routine work...

K Review Documents and Activity **Additional Details** Expand All

Work Request History

Step Responded By	On	Workflow Step	Status	Step Status After	Comments
UAT USER	11/04/2025 14:55	Basic	Requested	None	
EMULLAN	11/04/2025 14:57	Edit and Approve	Requested	Approved	
EILEEN MULLAN(164640)	11/04/2025 14:58	Basic	Approved	None	
SYSTEM	11/04/2025 14:58	Basic	Assigned to Work Order	None	
EILEEN MULLAN(164640)	11/04/2025 15:15	Comments	Assigned to Work Order	None	Estates Staff Comments

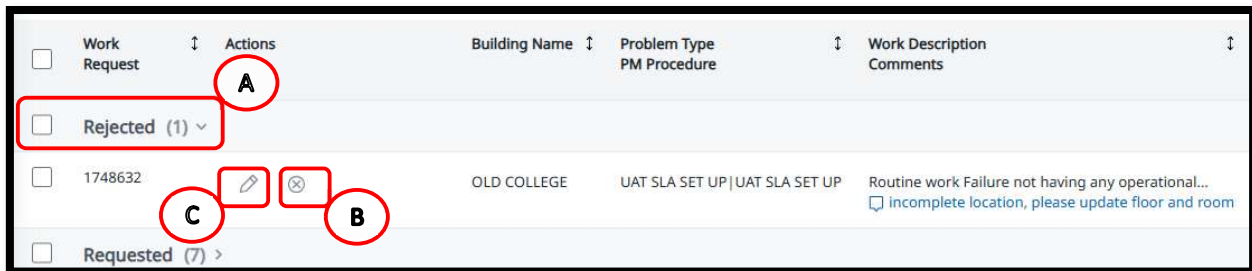
L **Account Information**

(K) 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.

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

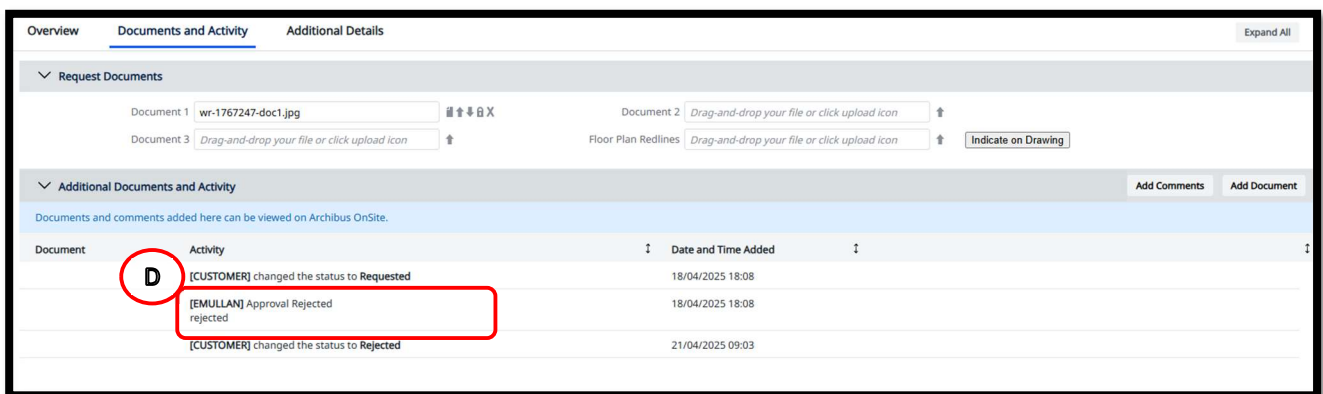
1.4 Rejected Work Request

When you have raised a work request, it will arrive with the Estates Helpdesk staff for review. If significant details are missing or need clarification the Helpdesk Technicians will firstly try to contact, you to discuss. If we are unable to contact, you then the WR may be rejected. If they opt to reject a work request, it will be displayed in your console under the status step **(A) Rejected**.



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

If selecting Update the **Work Request** screen will appear



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

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

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

The screenshot displays the 'Work Request: 1767247' form in a 'Rejected' state. The form is divided into three main sections: Location, Problem, and Request Details. The 'Location' section includes fields for Site Code (HOLYROOD), Building Code (1), Floor Code (02), and Room Code (245). The 'Problem' section includes a Priority dropdown (set to 3 - Priority), a Status dropdown (set to Rejected), and a Problem Type dropdown (set to ELECTRICAL/LIGHTING). The 'Request Details' section includes fields for Requested By (CUSTOMER A CUSTOMER), Requestor's Phone # (650 4567), Date Requested (18/04/2025 18:08), and Date to Perform (18/04/2025 18:08). At the bottom right, there are three buttons: Cancel, Save, and Submit. The 'Save' button is highlighted with a red circle and the letter 'E'.

Back to Requests
Work Request: 1767247 Rejected
Priority work...

Overview Documents and Activity Additional Details Expand All

Location, Problem and Request Details

Description

Priority work
Failure causing only moderate disruption to operations

Location

Site Code
HOLYROOD
HOLYROOD

Building Code
1
OLD COLLEGE

Floor Code
02

Room Code
245

Problem

Priority
☐ 5 - By Agreed Date
☐ 4 - Routine
☒ 3 - Priority
☐ 2 - Urgent
☐ 1 - Emergency

Status
Rejected

Problem Type
ELECTRICAL/LIGHTING

Request Details

Requested By:
CUSTOMER
A CUSTOMER

Requestor's Phone #
650 4567

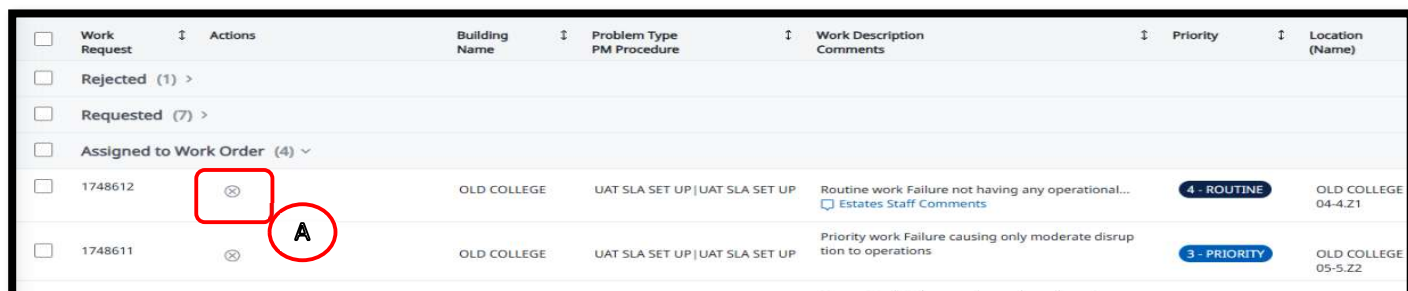
Date Requested
18/04/2025 18:08

Date to Perform
18/04/2025 18:08

Cancel **Save** Submit

1.5 Cancelling a Work Request Raised in Error

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



☐	Work Request	Actions	Building Name	Problem Type PM Procedure	Work Description Comments	Priority	Location (Name)
☐	Rejected (1) >						
☐	Requested (7) >						
☐	Assigned to Work Order (4) v						
☐	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.Z1
☐	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.Z2

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

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

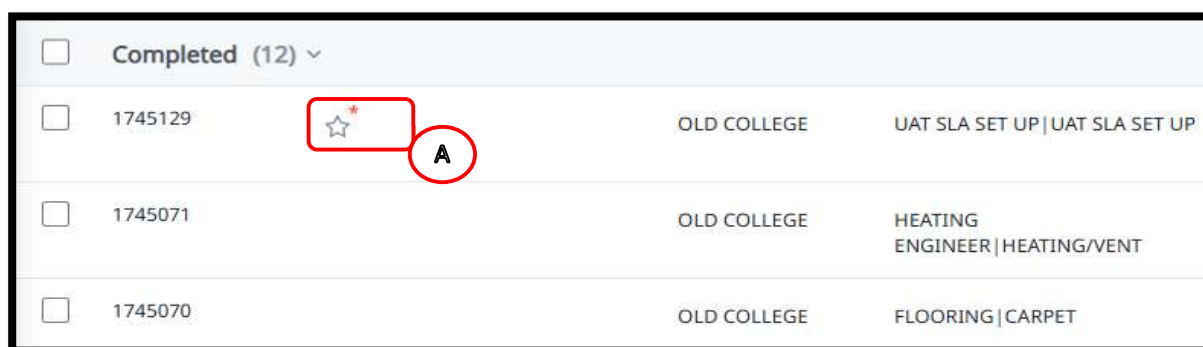
1.6 Customer Survey

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

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

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

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



☐	Completed (12) ▾			
☐	1745129		OLD COLLEGE	UAT SLA SET UP UAT SLA SET UP
☐	1745071		OLD COLLEGE	HEATING ENGINEER HEATING/VENT
☐	1745070		OLD COLLEGE	FLOORING CARPET

The system will display a Survey pop-up screen.

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



Survey Work Request 1745129

Satisfaction Rating: No Rating ▾

Satisfaction Notes*: No Rating

Exceptional

Above Average

Average

Below Average

Poor

B Save

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

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

APPENDIX A

2.0. Appx A: Navigating the Maintenance Console Screen

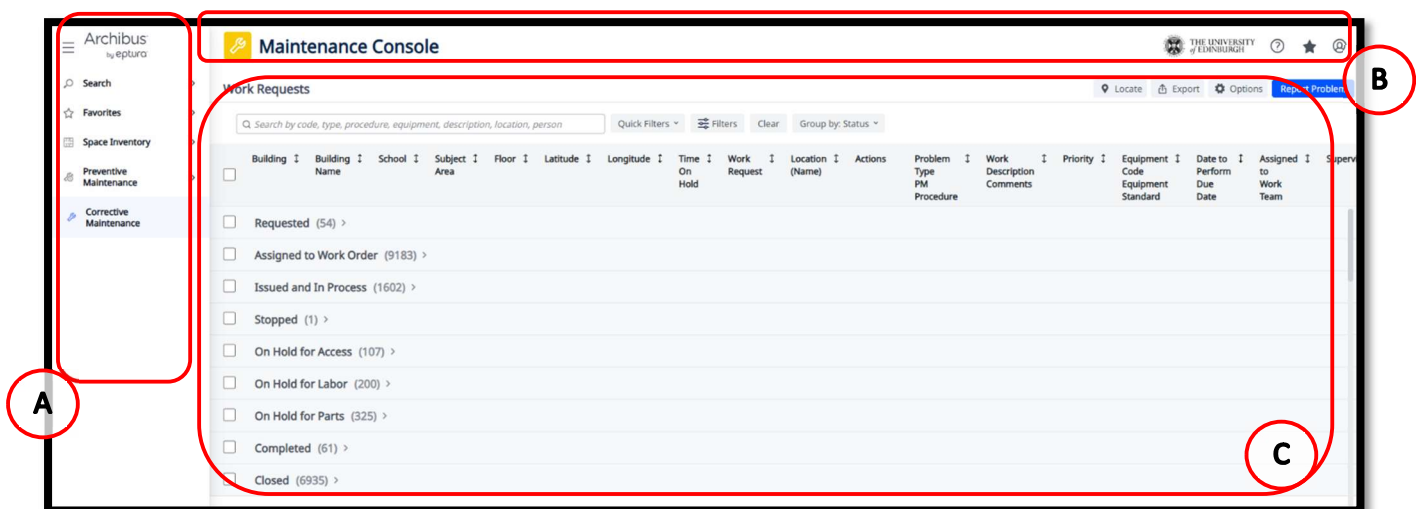
2.1. Maintenance Console Screen

The Maintenance Console screen is split into three main sections:

Side bar navigation panel on the left **(A)**, from which you select the content you wish to see. The content displays in the workspace on the right.

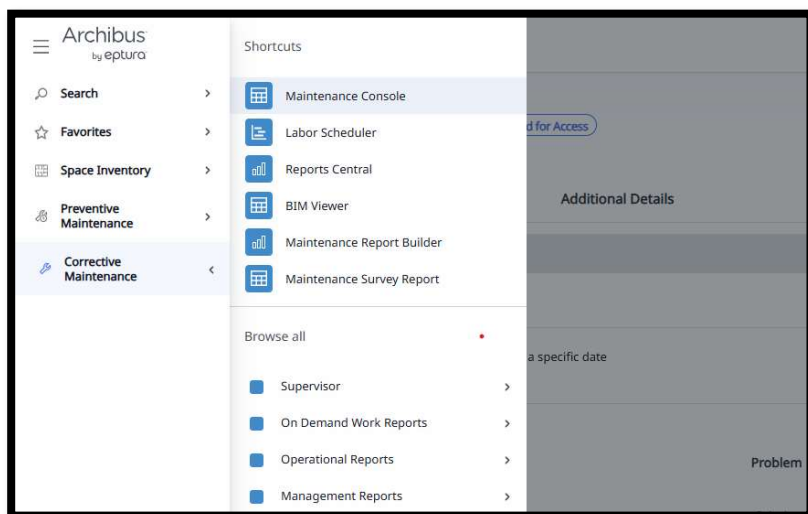
View Header **(B)**, from left to right, the components of the view header are

- 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



Workspace **(C)** - 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 a list of views available to select.

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

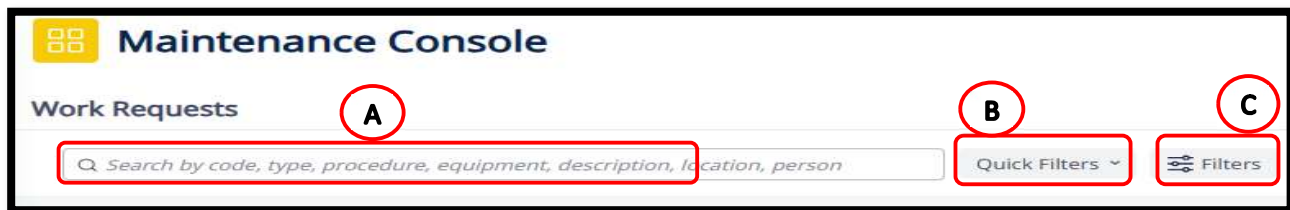
- **Customer:** - will see only work requests they have created
- **Work Team Supervisor:** - will see work requests assigned to work teams they are part of, as well as any requests they have created
- **Helpdesk:** - will see work requests regardless of who created them or which work team they have 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. See [2.3 Using the Group By Option](#) for more details.

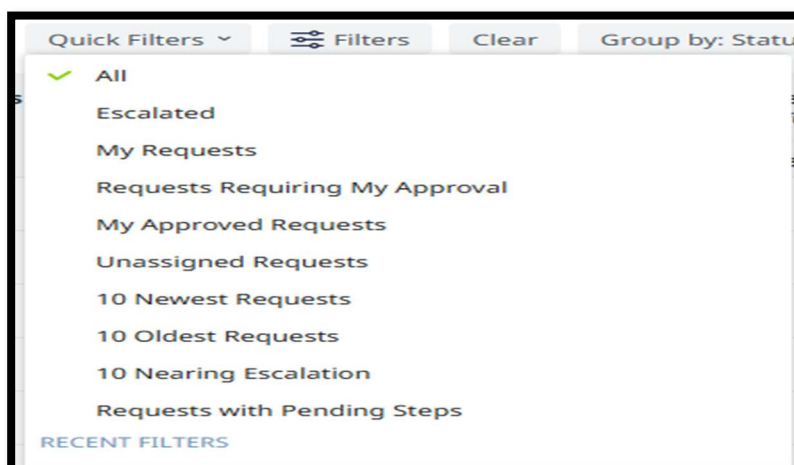
2.2. Using Filters

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. Quick Filters 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 it is advised not to combine Quick Filters and Advanced Filters together. Once you have your filter settings use the **(D) Action** buttons.

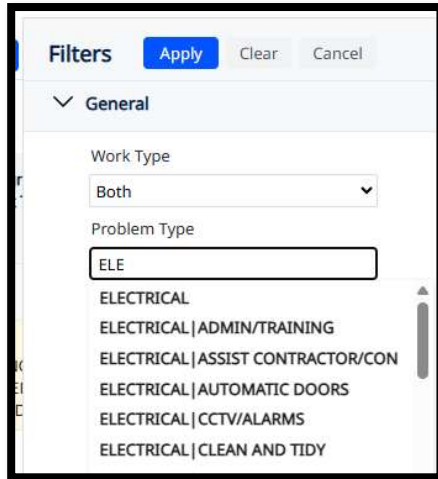
- If you are happy with your filter settings click **Apply** option, and the Console page will show the Work Requests that fall within the selected criteria.
- If you are completing the filter and want to start over, click **Clear** to remove your current entries.
- If you decide you do not want to work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

The screenshot shows the 'Filters' side panel. At the top, there are three buttons: 'Apply' (highlighted with a red circle and labeled 'D'), 'Clear', and 'Cancel'. Below these are several expandable sections, each with a chevron icon: 'General', 'Equipment & PM Details', 'Location & Organization', 'People' (which is expanded), 'Request Status', 'Date Range', and 'Parts & Costs'. The 'People' section is expanded, showing three input fields: 'Work Team', 'Craftsperson', and 'Trade'.

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:

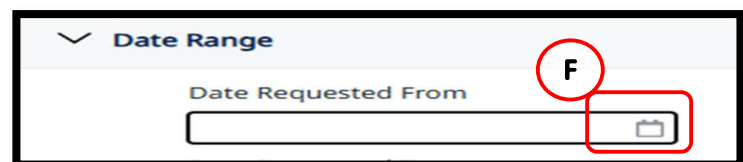
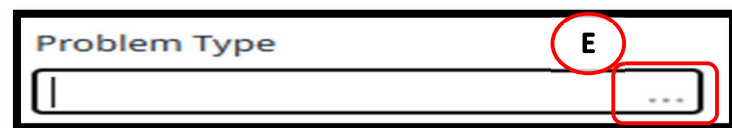
- i) Typing directly in any fields, which will start to provide a drop-down list to select from



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.

Select Value - Problem Type

✓ 2 selected

Problem Type Code: B 3 C 32 D 5 E 65 F 22 G 20 H 24 J 21 K 7 L 18 P 37 R 4 S 7 U 2 All 267

☐ 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

Previous Page 1 of 3 Next

Close Save Selected Clear

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

Select Value - Problem Type

✓ 1 selected

Problem Type Code: B 3 C 32 D 5 E 65 F 22 G 20 H 24 J 21 K 7 L 18 P 37 R 4 S 7 U 2 All 267

G

☐ Problem Type Code

Problem Type Description

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.

Select Value - Problem Type

✓ 1 selected

Problem Type Code: PE 8 PL 24 PR 5 Up All 37

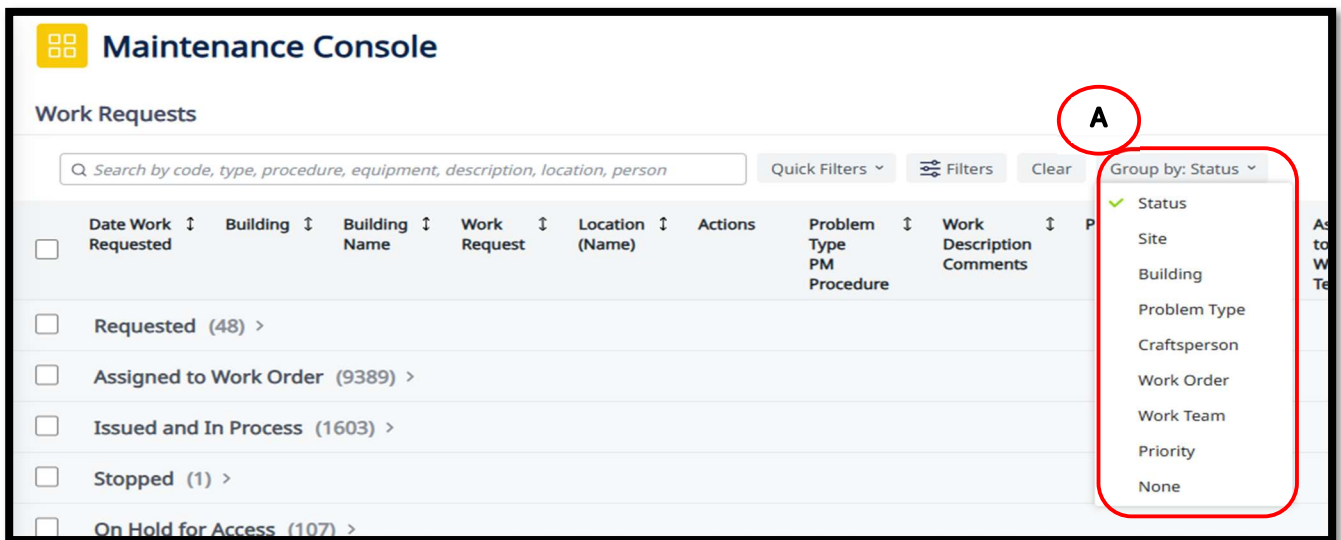
H

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.



Maintenance Console

Work Requests

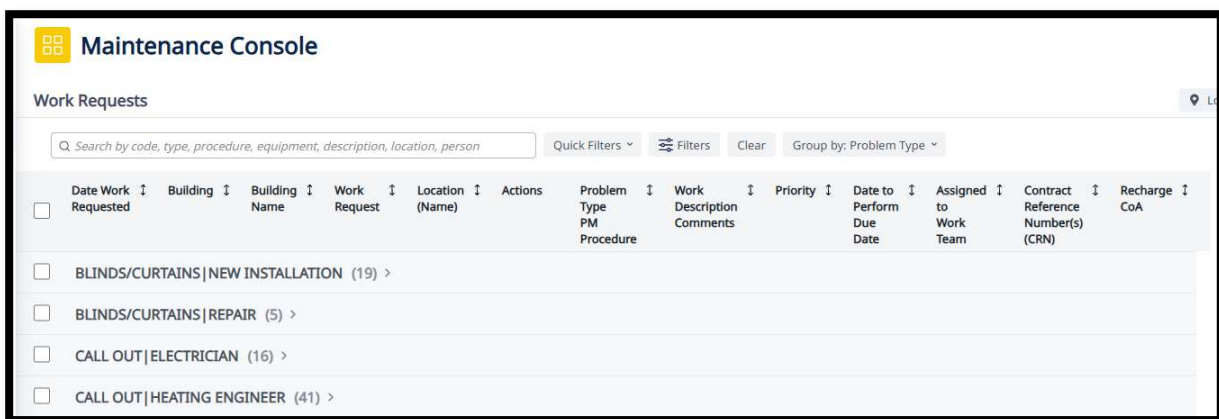
Search by code, type, procedure, equipment, description, location, person

Quick Filters Filters Clear Group by: Status

- ✓ Status
- Site
- Building
- Problem Type
- Craftsperson
- Work Order
- Work Team
- Priority
- None

	Date Work Requested	Building	Building Name	Work Request	Location (Name)	Actions	Problem Type PM Procedure	Work Description Comments
☐	Requested (48) >							
☐	Assigned to Work Order (9389) >							
☐	Issued and In Process (1603) >							
☐	Stopped (1) >							
☐	On Hold for Access (107) >							

The system will re-group the records by the selected option. Note that Group By is not affected when clearing filters, if you wish to revert to group by status this needs to be selected from the options.



Maintenance Console

Work Requests

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

Quick Filters Filters Clear Group by: Problem Type

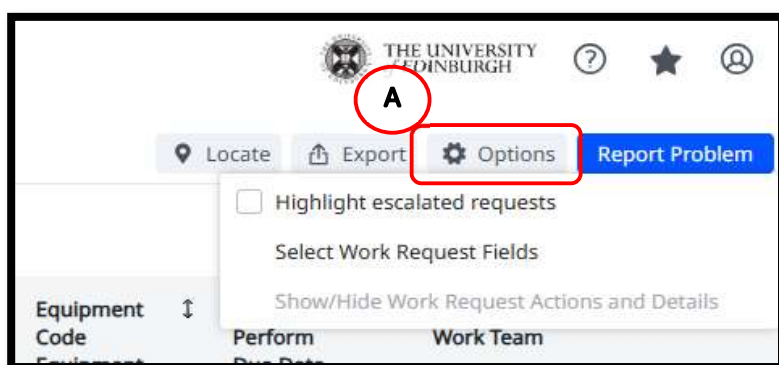
	Date Work Requested	Building	Building Name	Work Request	Location (Name)	Actions	Problem Type PM Procedure	Work Description Comments	Priority	Date to Perform Due Date	Assigned to Work Team	Contract Reference Number(s) (CRN)	Recharge CoA
☐	BLINDS/CURTAINS NEW INSTALLATION (19) >												
☐	BLINDS/CURTAINS REPAIR (5) >												
☐	CALL OUT ELECTRICIAN (16) >												
☐	CALL OUT HEATING ENGINEER (41) >												

2.4. Amending Columns - Maintenance Console

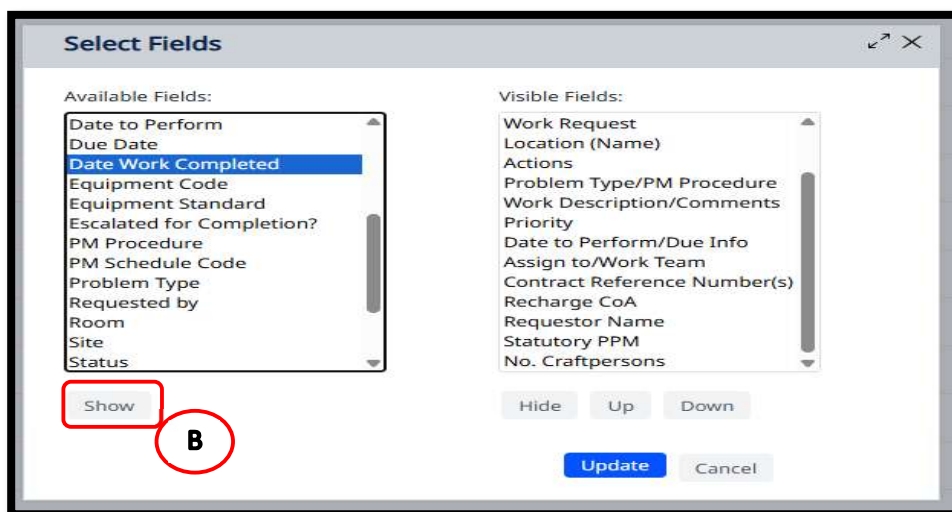
Having applied the necessary filters and the system has displayed the relevant work requests, you can also amend the columns displayed depending on your role.

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.

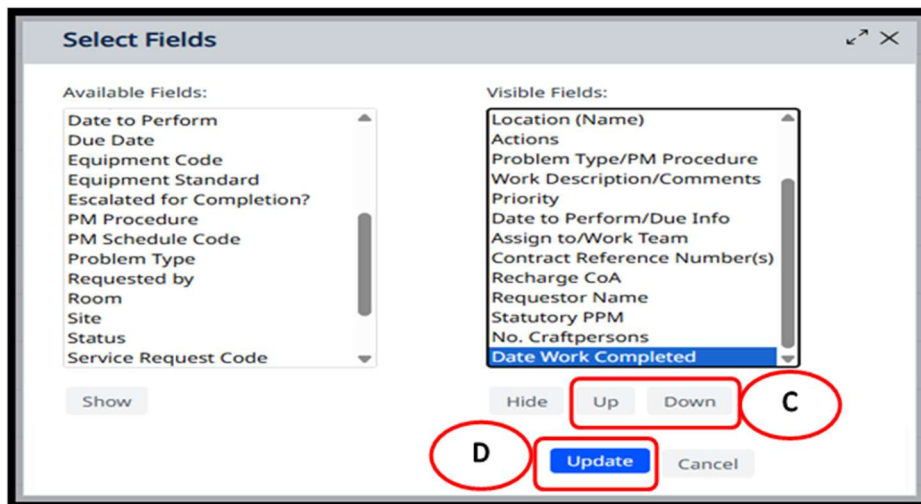


The left-hand column will show all available fields, while the right-hand column will show the selected fields already displayed on your Building Operations Console.

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
• Date Work Requested • Site • Building Name • Work Request Code • Problem Type • Work Description • Priority • Action buttons • Work Team Code • Requested By	• Building Name • Work Request Code • Problem Type • Requested By • Work Description • Assigned To • Due Date • Action buttons • Escalated for Completion	• Building Name • Work Request Code • Problem Type • Floor • Work Team Code • Assigned To • Date Work Requested • Due Date • Action buttons • Escalated for Completion

Note: It has been found that if screen layout contains column Work Description/Comments this prevents the Work Description form being updated directly from the console view. Descriptions can still be edited by opening a WR until it reaches Completed Status at which point the only method of adding information is from the console view.

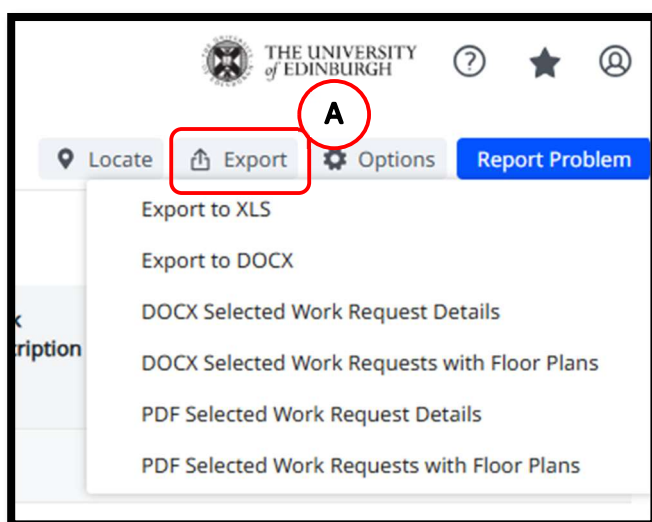
2.5. Exporting from Maintenance Console

On occasion it is useful to export information from the Maintenance Console, either to share electronically or print to paper.

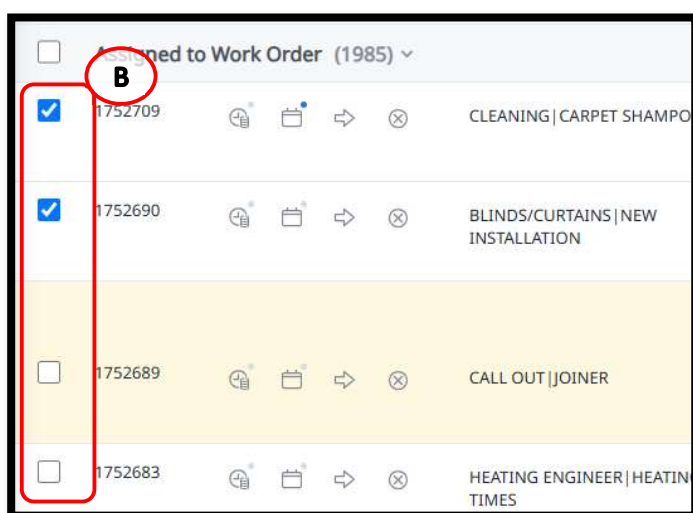
Note: Print to paper is the current work around if a Craftsperson is unable to use their mobile app to access and update WRs. Ensure any issues with the mobile app are reported to Archibus.Support@ed.ac.uk

There are various options available to export in different formats, all options are accessed through the **(A) Export** button at the top right of the console view.

The main formats available are Excel (XLS), Word (DOCX) and PDF.



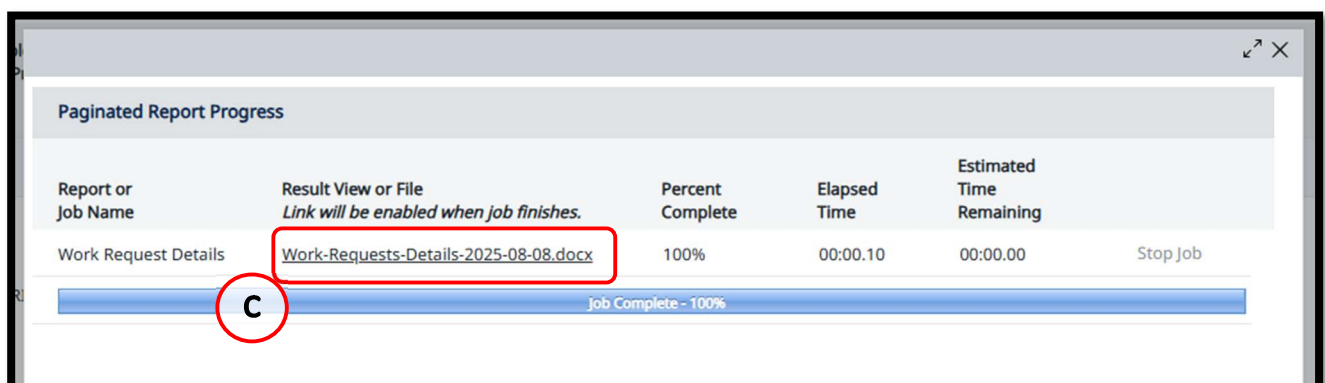
The option allows you to either export everything shown on screen or to select specific WRs from a those shown in console, using the **(B) Tick Boxes**.



Export to XLS	Exports all work requests in current view into an excel spreadsheet, including all columns on show and in a format which is similar to the console layout.
Export to DOCX	Exports all work requests in current view into a word document, including all columns on show and in a format which is similar to the console layout.
DOCX Selected Work Request Details	Exports all work requests selected from current view into a word document. Each WR is given a separate page with a summary table of key details, a list of steps history and details of any Craftsperson assignments/work logs already against work request.
DOCX Selected Work Requests with Floor Plans	Exports all work requests selected from current view into a word document. Each WR is given a separate page with a floor plan* and a footer which contains WR number, problem type, equipment code and location information. If a room code has also been included in WR location this will be highlighted on the floor plan.
PDF Selected Work Request Details	Exports all work requests selected from current view into a Pdf document. Each WR is given a separate page with a summary table of key details, a list of steps history and details of any Craftsperson assignments/work logs already against work request.
PDF Selected Work Requests with Floor Plans	Exports all work requests selected from current view into a Pdf document. Each WR is given a separate page with a floor plan* and a footer which contains WR number, problem type, equipment code and location information. If a room code has also been included in WR location this will be highlighted on the floor plan.

Once you have clicked on your selected export option a pop-up screen will appear showing progress of export. Note: the more information being exported the longer this may take, especially if exporting with floor plans.

Once completed you will need to click on the (C) Link which appears. The document will then be retrievable from your downloads folder.



2.6. 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.

The screenshot shows the Maintenance Console interface. At the top, there is a header bar with the title 'Maintenance Console' and a sub-header 'Work Requests'. Below the header, there is a toolbar with buttons: 'Cancel Selection', 'Estimate', 'Schedule', 'Schedule Labor', 'Issue', and 'Cancel Request'. A red box labeled 'B' highlights this toolbar. Below the toolbar, there is a table of work requests. The table has columns: 'Date Work Requested', 'Building', 'Building Name', 'Work Request', 'Location (Name)', 'Actions', 'Problem Type', 'Work Description', and 'Priority'. Two work requests are highlighted in yellow, and their tick boxes are checked. A red box labeled 'A' highlights these tick boxes. The work requests are:

Date Work Requested	Building	Building Name	Work Request	Location (Name)	Problem Type	Work Description	Priority
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
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
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	→	Issued	If completed in error/hold reason resolved
Issued	→	Assigned	If issued in error
Assigned	→	Requested	If priority/location/problem type needs amended

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 or *OCS*	Work Request requires FMS/OCS fire 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 Archibus.Support@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 Screen too Bright

Archibus V2024.04 console views tend to be predominantly white, if you find this uncomfortable you can make use of browser settings which will adjust your screen to dark mode.

[Dark Mode for Chrome](#)

[Dark Mode for Microsoft Edge](#)

[Dark Mode for Firefox](#)

6.3 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 Archibus.Support@ed.ac.uk
- Help & Support with System issues (inc Mobile App)
 - Please contact Archibus System Support Archibus.Support@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