

Section 1

Creating a Work Request in Archibus

In this section, you will learn how to:

Create a new work request

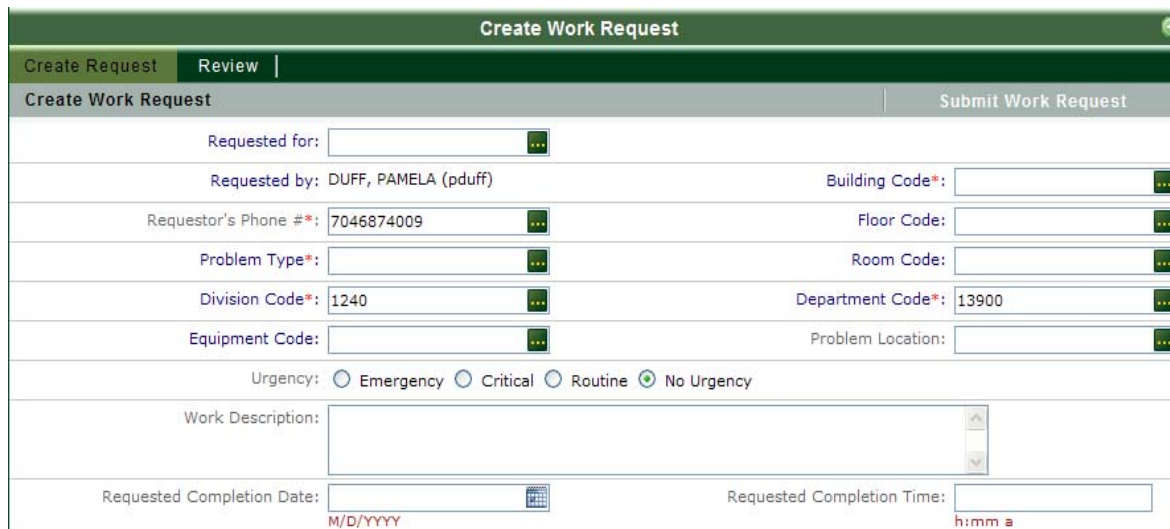
Use the Archibus Search features (Mini console, ellipses button, etc.)

1.) In the Supervisor role, look for the Work Requests section of tasks in the left column



Then click on Create Work Request

2.) You will then see the form for creating a work request appear

A screenshot of the 'Create Work Request' form in Archibus. The form has a green header with 'Create Work Request' and a 'Submit Work Request' button. The form contains several fields: 'Requested for:' (blank), 'Requested by: DUFF, PAMELA (pduff)', 'Requestor's Phone #*: 7046874009', 'Problem Type*' (blank), 'Division Code*: 1240', 'Equipment Code:' (blank), 'Building Code*' (blank), 'Floor Code:' (blank), 'Room Code:' (blank), 'Department Code*: 13900', 'Problem Location:' (blank), 'Urgency' (radio buttons for Emergency, Critical, Routine, No Urgency, with 'No Urgency' selected), 'Work Description:' (text area), 'Requested Completion Date: M/D/YYYY' (calendar icon), and 'Requested Completion Time: h:mm a' (time picker).

- On the form, your name, phone number, division code and department code will automatically appear. Unless they are incorrect, you do not need to edit these fields.
- Unless you are submitting a work request for someone else, leave the “Requested for” field blank.


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3.) Before you submit a form, it is very important that you fill out as many fields as possible in order for Facilities to efficiently complete your request. And you especially need to fill out the fields that have a red asterisk next to them.

Building Code* ←

4.) Now you need to start filling out the form. Click on an ellipses button directly to right of a field. For this example, we will use Problem Type.

Problem Type*:



Select Value - Problem Type | Close

Problem Type Code: [_](#)[2] [E](#)[16] [G](#)[26] [H](#)[29] [K](#)[6] [M](#)[14] [P](#)[10] [R](#)[13] [S](#)[1] [V](#)[10] [All](#)[127]

Problem Type Code	Problem Type Description	
<input type="text"/>	<input type="text"/>	
_OTHER	Problem Not Listed	
_REQUEST-ESTIMAT	Request Estimate	
EL-CLASSBELL	Class bells Problem	
EL-CLOCKS	Clocks Problem	
EL-COOKINGEQ	Cooking Equipment Repair	
EL-ELEV	Elevators Problem	
EL-EPHONELIGHT	Emergency phone light out	
EL-FIREALARM	Fire Alarm Problem	
EL-GENERATORS	Generator Problem	
EL-HIGHVOLTAGE	High Voltage Dist. Repairs	
EL-HOTWORKPERMIT	Hot Work Permit	
EL-IN-LIGHT	Light burned out or does not power on Inside Bldg.	
EL-OTHER	Electrical problem not listed	
EL-OUT-LIGHT	Outside light burned out. flickering or does not power on or remaining on during day.	
EL-OUTLET	Outlet not working	
EL-POWER	Power Problem	
EL-SEC ALARM	Security Alarm Problem	
EL-UTILITYLOCATE	Locate Utilities	
GND-GOOSECLEAN	Perfrom Goose dropping cleanup	
GND-GRAFFITTI	Graffiti removal	
GND-IRRIGATION	Broken Irrigation	
GND-LAWN MOWING	Lawn Mowing	
GND-LINESTRIPING	Perform Line Striping	
GND-LITTER	Litter Clean-up, trash can full	
GND-MOVEREQUEST	Moving Requests	
GND-OTHER	Grounds problem not listed	

A window will pop up providing you with the information available for that specific field.

5.) You can now search for the information you need for the field 3 separate ways:

- To sort the information by Problem Type, click on any letter in the problem type code area

Problem Type Code: [_](#)[2] [E](#)[16] [G](#)[26] [H](#)[29] [K](#)[6] [P](#)[10] [R](#)[13] [V](#)[9] [Z](#)[16] [All](#)[127]

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This will sort the problem type code by the letter you selected

Problem Type Code: _[2] E[16] G[26] H[29] K[6] P[14] **R[3]** V[9] Z[16] All[127]



Select Value - Problem Type		Close
Problem Type Code: RECY-[13] Up Top All[13]		
Problem Type Code ▲	Problem Type Description ▾	
<input type="text"/>	<input type="text"/>	
RECY-ALUMINUMCAN	Overflow of aluminum cans	
RECY-BOTTLES	Overflow of bottles	
RECY-CARDBOARD	Overflow of cardboard	
RECY-CHIPBOARD	Overflow of chipboard	
RECY-DESKSIDE	Need a deskside paper bin	
RECY-EMPTYRECYC	Empty recyclables	
RECY-OFFICE	Need office cleaned out	
RECY-OTHER	Recycling Problem not listed	
RECY-PAPER	Overflow of paper	
RECY-ROLL-OFF	Need a full size roll-off	
RECY-SHREDPAPER	Overflow of shredded paper	
RECY-SPECRECYC	Special Recycling	
RECY-STYROFOAM	Overflow of styrofoam	

- If you remember the name of the description, but do not see it, you can also use the mini console.

Problem Type Code ▲	Problem Type Description ▾	
<input type="text"/>	<input type="text"/>	

Note: Some windows will automatically open the mini console. However, if you only see the column titles, click on the small plus sign.

Select Value - Problem Type		Close
Problem Type Code: RECY-[13] Up Top All[13]		
Problem Type Code ▲	Problem Type Description ▾	
RECY-ALUMINUMCAN	Overflow of aluminum cans	
RECY-BOTTLES	Overflow of bottles	
RECY-CARDBOARD	Overflow of cardboard	
RECY-CHIPBOARD	Overflow of chipboard	



After you open the mini console, you can type in the appropriate input box and click the filter button with the down arrow. This will filter all the problem type by information you entered.

Problem Type Code ▲	Problem Type Description ▾	
<input type="text"/>	<input type="text" value="light"/>	



Problem Type Code ▲	Problem Type Description ▾	
<input type="text"/>	<input type="text" value="light"/>	
EL-EPHONELIGHT	Emergency phone light out	

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Or, if you cannot remember the entire code or description of the problem type, you can place a percent sign (%) directly next to the inputted text.

Problem Type Code ▲	Problem Type Description ▾	
<input type="text"/>	<input type="text" value="light%"/>	
EL-IN-LIGHT	Light burned out or does not power on Inside Bldg.	

This will filter all of the codes and descriptions by the text that you entered

- You can also sort the Problem Type Code and Description without entering any information

In the mini console, directly to the right of the column titles, you will see small grey buttons. When you select these buttons, the codes and descriptions will be sorted alphabetically.

Problem Type Code ▲	Problem Type Description ▾	
<input type="text"/>	<input type="text"/>	
Problem Type Code ▲	Problem Type Description ▾	
<input type="text"/>	<input type="text"/>	
_OTHER	Banners and sign install	
_REQUEST-ESTIMAT	Broken Irrigation	
EL-CLASSBELL	Card Swipe problem	
EL-CLOCKS	Ceiling Tile Repair	
EL-COOKINGEQ	Chartwell related Problems	
EL-ELEV	Chiller Problem	
EL-EPHONELIGHT	Class bells Problem	
EL-FIREALARM	Clean-up body fluids	
EL-GENERATORS	Clean-up spill	
EL-HIGHVOLTAGE	Clocks Problem	
EL-HOTWORKPERMIT	Cooking	
	Cooking Equipment Repair	
	Cooling Tower Problem	
	Dishwasher down	

6.) Once you find your information, click on it. It will automatically be entered into the appropriate input box

EL-IN-LIGHT	Light burned out or does not power on Inside Bldg.
Problem Type*: <input type="text" value="EL-IN-LIGHT"/>	<input type="text"/>

7.) Repeat steps 4 – 6 until you have filled in all of the fields

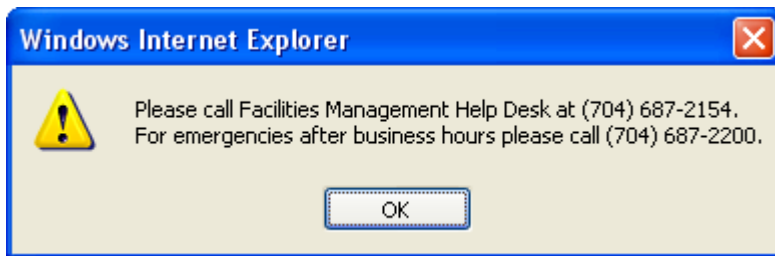
Note: You do not need to fill in Equipment Code unless you know the equipment that is required to complete your work request

8.) You now need to select the urgency of your work request

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Urgency: Emergency Critical Routine No Urgency

You can select any level of urgency, but if you select Emergency...



This error message will pop up.


- Because Facilities cannot monitor Archibus 24/7, it is very important that if you have an Emergency Work Request, you contact the Facilities Management Help Desk or the Police as soon as possible.

9.) Next, you need to enter a detailed work description so that Facilities will be able to efficiently complete your work request.

Work Description: Our lights are not working in the back right corner of the classroom. We have tried getting the light bulbs replaced, but that did not work. Please be aware that there are classes being held on Monday, Tuesday and Wednesday from 9:30am - 1:15.

- Enter as much information as you can about your work request, as well as any details that Facilities should be aware of (ex: construction, open wires, or classes, etc.).

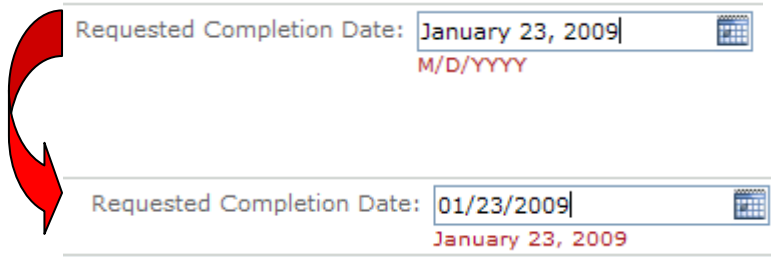
10.) Finally, you need to enter the Requested Completion Date and Time.

Requested Completion Date: 
M/D/YYYY

Requested Completion Time:
h:mm a

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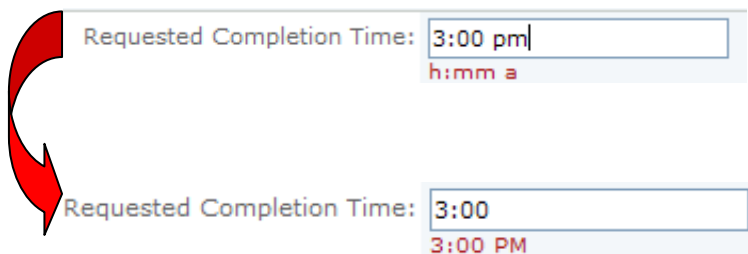
- Because it is not a validated field, you can type in the time and date and it will automatically convert it to standard format.



Requested Completion Date: January 23, 2009
M/D/YYYY

Requested Completion Date: 01/23/2009
January 23, 2009

A red curved arrow on the left points from the first input field to the second, indicating the automatic conversion process.

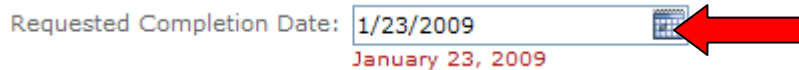


Requested Completion Time: 3:00 pm
h:mm a

Requested Completion Time: 3:00
3:00 PM

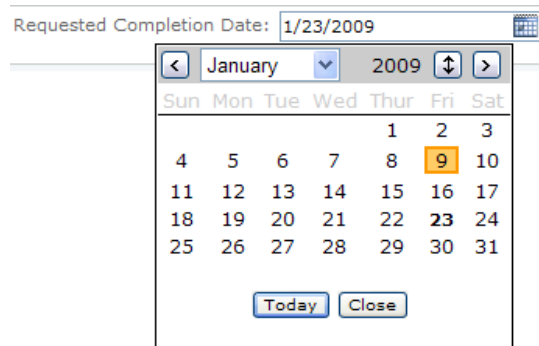
A red curved arrow on the left points from the first input field to the second, indicating the automatic conversion process.

- Also, if you need to see a calendar, click on the calendar button directly to the right of “Requested Completion Date.”



Requested Completion Date: 1/23/2009
January 23, 2009

A red arrow points to the calendar icon on the right side of the input field.



Requested Completion Date: 1/23/2009

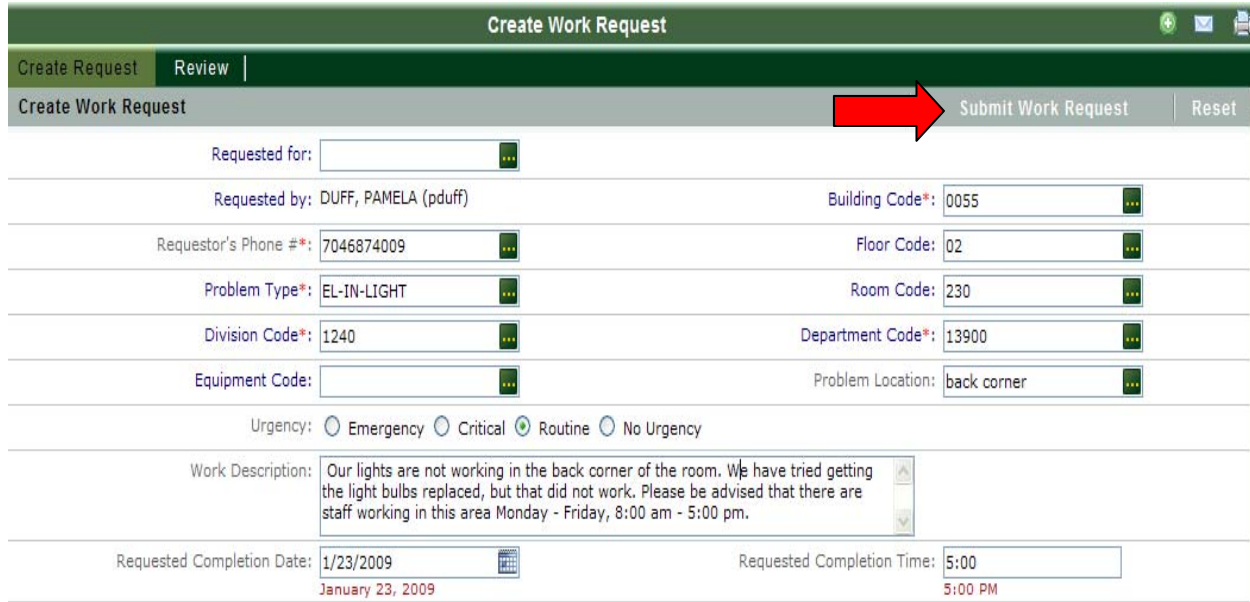
Sun	Mon	Tue	Wed	Thur	Fri	Sat
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

Today Close

11.) After you have filled out the entire form, remember to [Review the Entire Work Request](#) and make sure that everything is entered in correctly.

12.) Once you are finished, click on Submit Work Request

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Create Work Request

Create Request | Review

Create Work Request **Submit Work Request** | Reset

Requested for: []

Requested by: DUFF, PAMELA (pduff) Building Code*: 0055

Requestor's Phone #*: 7046874009 Floor Code: 02

Problem Type*: EL-IN-LIGHT Room Code: 230

Division Code*: 1240 Department Code*: 13900

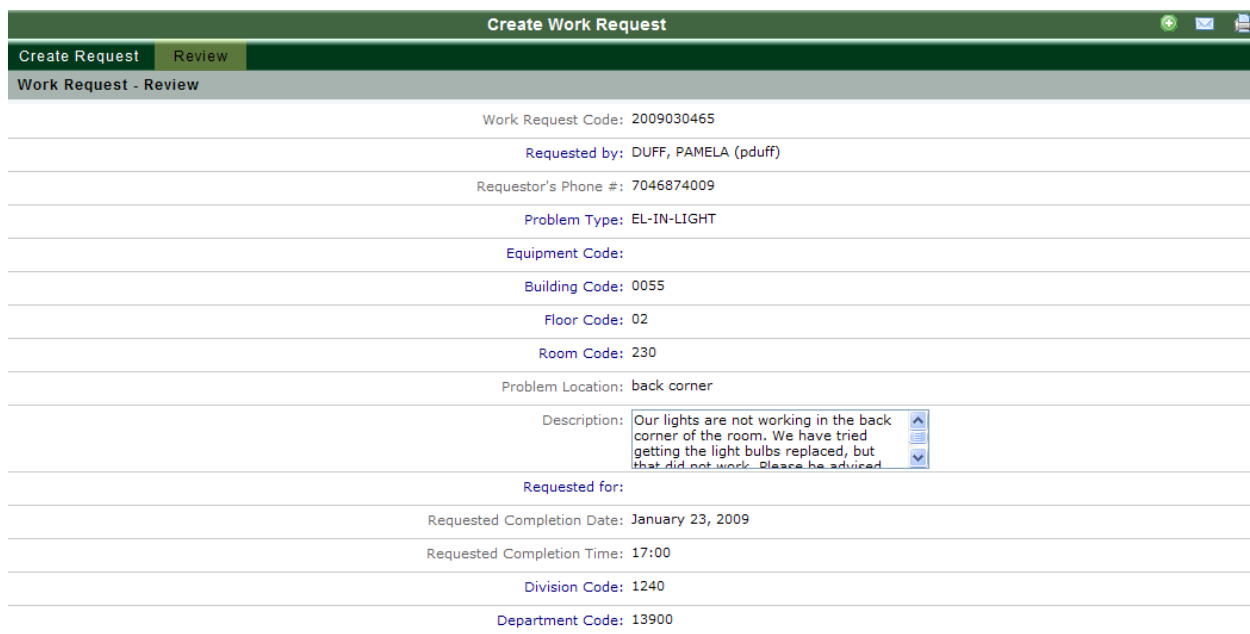
Equipment Code: [] Problem Location: back corner

Urgency: Emergency Critical Routine No Urgency

Work Description: Our lights are not working in the back corner of the room. We have tried getting the light bulbs replaced, but that did not work. Please be advised that there are staff working in this area Monday - Friday, 8:00 am - 5:00 pm.

Requested Completion Date: 1/23/2009 (January 23, 2009) Requested Completion Time: 5:00 (5:00 PM)

13.) You will then be taken to a review page, which will list all of the details of the work request.



Create Work Request

Create Request | Review

Work Request - Review

Work Request Code: 2009030465

Requested by: DUFF, PAMELA (pduff)

Requestor's Phone #: 7046874009

Problem Type: EL-IN-LIGHT

Equipment Code:

Building Code: 0055

Floor Code: 02

Room Code: 230

Problem Location: back corner

Description: Our lights are not working in the back corner of the room. We have tried getting the light bulbs replaced, but that did not work. Please be advised...

Requested for:

Requested Completion Date: January 23, 2009

Requested Completion Time: 17:00

Division Code: 1240

Department Code: 13900

- This page will list all of the information you have entered, as well as a work request code that you will be able to use for future reference. You are also welcome to print out the Review page for reference by selecting the print icon located in the upper right corner of the screen.