Create Work Request

Customer Documentation for ARCHIBUS Create Work Request Process:

1. **ARCHIBUS Sign in**
   Log into ARCHIBUS [https://archibus.uncc.edu/archibus](https://archibus.uncc.edu/archibus) using your Ninernet credentials.

   From the process navigation panel view, select Building Operations Management module from the main navigation menu; then, select Building Operations and the Customer role from the list of menu items.

   From the Customer role, select the Create Work Request task.
3. Work Request Form

The Work Request Form displays. Note that the Work Request form is divided into five sections for easier viewing: Requestor; Work Location; Equipment; Description and Priority.

Several fields will pre-populate based upon the user account information. These fields include Requested by, Contact Phone, Sub-Department and Department Code information. Unless these fields are incorrect, you do not need to edit.

Employee user account information is prepopulated on the form.

Requested Completion Date defaults to No Urgency.
4. **Required Form Data**

Before you submit the Work Request form, it is very important that you fill out as many fields as possible in order for Facilities to efficiently complete your request.

All fields indicated with a red asterisk (*) are required. In addition to the prepopulated required fields, these required fields include *Problem Type* and *Work Description*.

5. **Using ARCHIBUS Search Features (Ellipses button, Filtering Data Lists, and Autocomplete)**
   
   **a. Ellipse buttons**

   You may use the ellipse button (also called a *Look-up button*) located to the right of each field to locate information. After selecting an ellipse button, a data list of information will display for filtering.
b. Filtering a Data List

To filter a data list, enter text into the search field and then select Enter on your keyboard. To remove the search filter, simply select the small “x” located to the right of the search console.
c. **Auto Complete Fields**
The Work Request Form fields feature auto-complete functionality. When you start typing in a validated field, the drop-down list will display possible values beginning with those letters.

You will be able to scroll through the list of options and select one of the values to populate the field.

![Auto Complete Fields](image)

6. **Completing the Work Request Form**
Populate and complete each field as needed until you have entered data into all the appropriate “required” fields in the Requestor and Work Location areas of the form.

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

   b. **Work Description:** Before you submit your request, you will need to enter text into the work description field.

The *Work Description* should be detailed enough so that Facilities will be able to efficiently complete your work request.

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.)

![Work Description](image)

   c. **Urgency:** There are four selections available for Work Request Priority:
   - *Emergency* = 24 hours or less;
   - *Critical* = 2 days;
   - *Routine* = 2 weeks;
   - *No Urgency* = 4 weeks.
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You may select any level of urgency, but if you select Emergency... The following message will pop up:

Select “Yes” to confirm and to submit the Work Request as an Emergency Work Request. Otherwise select “No” and select another Urgency level.

d. **Requested Completion Date:** You may update the Requested Completion Date and Time, as needed by typing in a new date and time. The requested completion date will auto populate based upon the level of urgency selected.

   **Note:** The Requested Completion Date field will automatically default to No Urgency: 4 weeks.

e. **Email Notification Option:** If you wish to receive automated email notifications each time the work request status changes, select the check box option: “The “Requested by” will receive emails when the work request status changes.

f. **Scheduled Event Name:** If your Work Request is for a special event set up, indicate the name of the event in the field available.

   **Note:** You should use Problem Type “GND-SPECIALEVENT” for all Special Event Set Up work requests so that the work request will route correctly to Grounds. **All Scheduled Event work requests require at least a 24-hour notice.**

7. **Submitting the Work Request Form**
After you have filled out the entire form, remember to Review the Entire Work Request and make sure that everything is entered in correctly.
Once you are finished completing and reviewing the form, click on the **Submit** button located at the top right corner of the work request form.

Selecting the **Submit** button will submit the Work Request to the shop and provide an Overview page with the Work Request details.

8. **The Work Request Overview Page**

   The overview 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 welcome to print out the Review page for reference by selecting the print work order icon located in the upper right corner of the screen.