



UNC CHARLOTTE

# Training Outline ARCHIBUS/FM Web Central Financial Account Manager (FAM)

## Beginner Archibus WR FAM

**Instructor:**

Ray Dinello, Director, FIS

**Coordinator & Information Contact:**

Pamela Duff





# Agenda

- Introduction
- Review
  - Roles and Processes
  - Approve or Reject Work Orders
- Hands-On Practice
- Split Funding
  - Process Overview
- FAM PM Approvals
  - Process Overview– Work Requests and PM
- Motor Fleet Reservations and Approval
- Reports & History
- Hands-On Practice
- Q&A



# Introduction

- **Training Objective:** To review ARCHIBUS functionality and processes in relation to the Financial Account Manager role through review, and hands on training.
- Provide a processes overview and the knowledge and skills needed to perform duties and daily responsibilities in relation to the specific role within ARCHIBUS Web Central.



# Your Role

- Financial Account Manager
  - Primary vs. Secondary vs. Third vs. Fourth
  - Building Operations vs. Project Management
  - Managing Account Codes (Banner vs. Archibus)



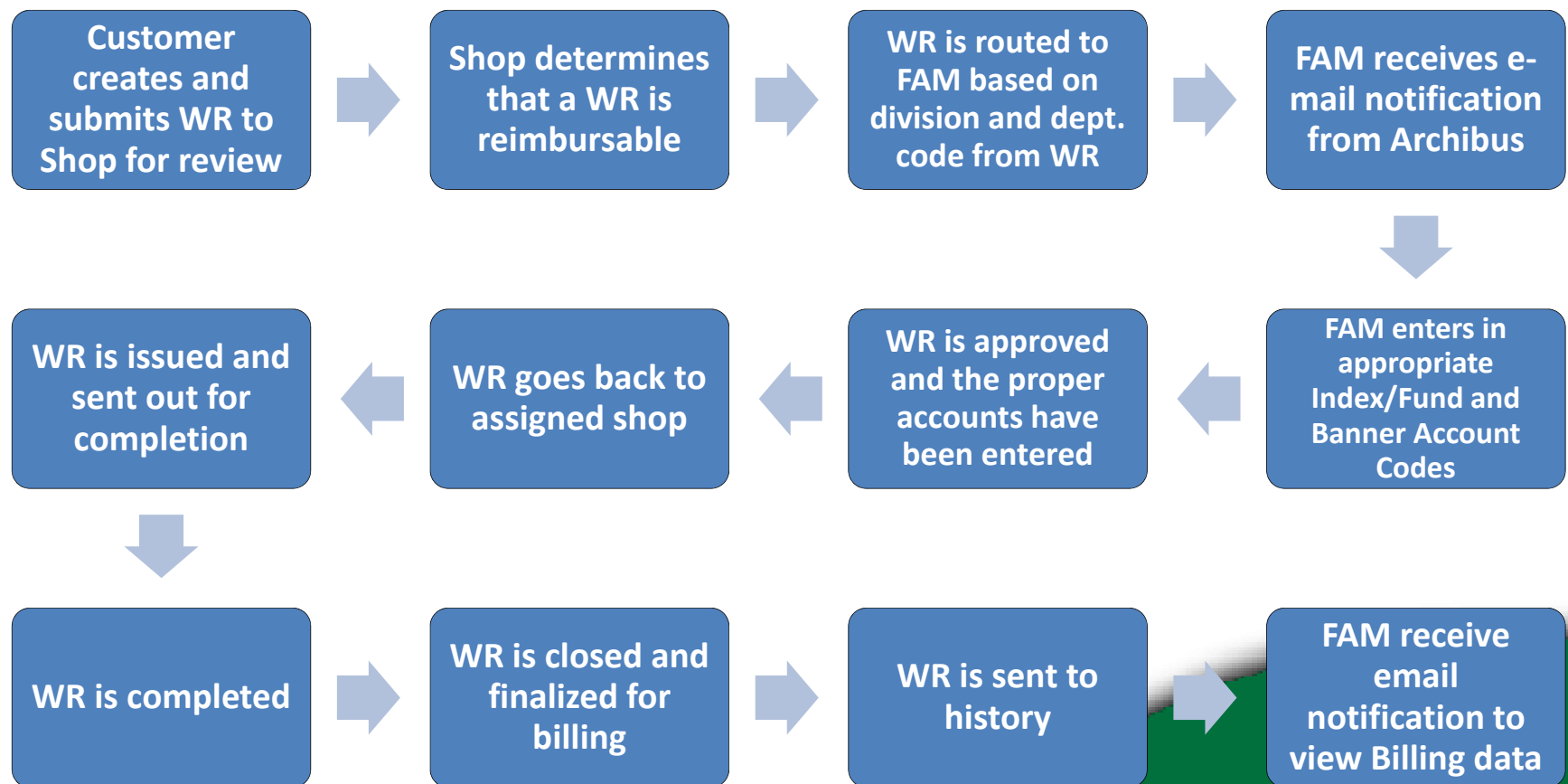
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# FAM Tasks and Procedures

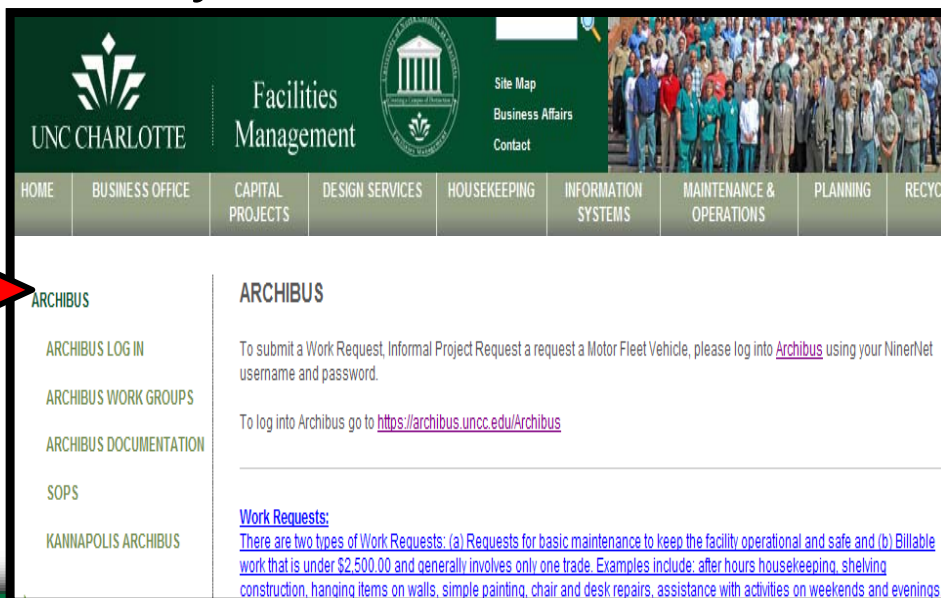
- Creating Work Orders
- Editing Account Codes
- Approving, or Rejecting Work orders, or PM Requests
- Project Management
  - Scope & Budget Estimate, Design Estimate, Amendments



# Process Overview



- Go to the Facilities Management Archibus Home Page - (<http://facilities.uncc.edu/Archibus>).
- Select or click on one of the Archibus log ins.  
Or, you may also log in directly at:  
<https://archibus.uncc.edu/archibus>
- Use your NinerNet username and password to login



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Facilities Management

Site Map  
Business Affairs  
Contact

HOME BUSINESS OFFICE CAPITAL PROJECTS DESIGN SERVICES HOUSEKEEPING INFORMATION SYSTEMS MAINTENANCE & OPERATIONS PLANNING RECYCLING

**ARCHIBUS**

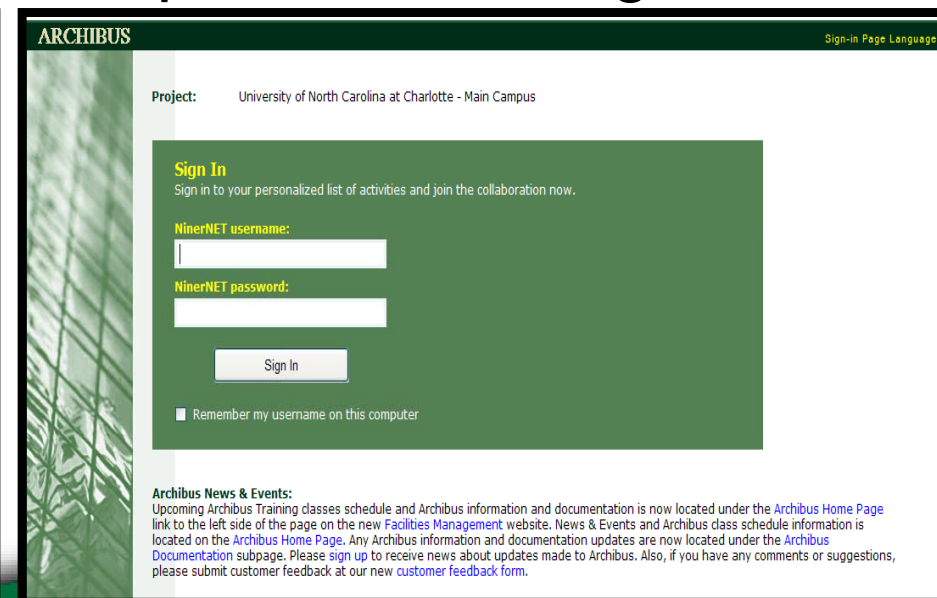
ARCHIBUS LOG IN  
ARCHIBUS WORK GROUPS  
ARCHIBUS DOCUMENTATION  
SOPS  
KANNAPOLIS ARCHIBUS

**ARCHIBUS**

To submit a Work Request, Informal Project Request a request a Motor Fleet Vehicle, please log into [Archibus](#) using your NinerNet username and password.

To log into Archibus go to <https://archibus.uncc.edu/Archibus>

**Work Requests:**  
There are two types of Work Requests: (a) Requests for basic maintenance to keep the facility operational and safe and (b) Billable work that is under \$2,500.00 and generally involves only one trade. Examples include: after hours housekeeping, shelving construction, hanging items on walls, simple painting, chair and desk repairs, assistance with activities on weekends and evenings



ARCHIBUS Sign-in Page Language

Project: University of North Carolina at Charlotte - Main Campus

**Sign In**  
Sign in to your personalized list of activities and join the collaboration now.

NinerNET username:

NinerNET password:

Remember my username on this computer

**Archibus News & Events:**  
Upcoming Archibus Training classes schedule and Archibus information and documentation is now located under the [Archibus Home Page](#) link to the left side of the page on the new [Facilities Management](#) website. News & Events and Archibus class schedule information is located on the [Archibus Home Page](#). Any Archibus information and documentation updates are now located under the [Archibus Documentation](#) subpage. Please [sign up](#) to receive news about updates made to Archibus. Also, if you have any comments or suggestions, please submit customer feedback at our new [customer feedback form](#).



# Basic Web Central Navigation

- **Menus**

ARCHIBUS

My Home

My Favorites

My Profile

Sign Out

Help

The screenshot shows the ARCHIBUS web interface. At the top, there is a navigation bar with links for My Home, My Favorites, My Jobs, My Profile, Sign Out, and Help. On the left side, there is a vertical menu with the following items: Building Operations Management, Building Operations, and Customer. Below these are sections for Tasks, Work Requests, Review Estimates, Reports, and Support Information, each containing a list of tasks with checkboxes. On the right side, there is a large graphic of a person's head and shoulders, overlaid with a grid pattern. Below this graphic, there are three red-bordered boxes containing the text: Current Activity, Current Role, and Task List. Red arrows point from these boxes to the corresponding sections in the left-hand menu: Current Activity points to Building Operations Management, Current Role points to Building Operations, and Task List points to the Work Requests section.





# Create Work Request

Select Room from Drawing option

- Tasks:
- Create Work Request
  - Request Work Request Cancellation
  - Edit Work Request Description
  - Review Work Request Awaiting Approval
  - Review All Active Work Requests
  - Work Request Satisfaction Results
  - Review Historical Work Request and Resources
  - FAM List
  - Building Liaison List

**Problem Type**

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**Basic Information** | Documents | Overview

**Requestor**

Requested by: DUFF, PAMELA (pduff) Contact Phone #: 704.687.4009

Requested for:

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**Work Location**

Same as requested for

Department Code: 1240  Facilities Management (Dpt) Sub Department Code: 13900  Facilities Management AVC

Building Code: 0055  Facilities Management & Police & Pu... Floor Code: 02

Room Code: 230   Problem Location:

---

**Equipment**

Equipment Code:

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**Description**

Problem Type:

Work Description:

---

**Priority**

Urgency:  Emergency  Critical  Routine  No Urgency

Requested Completion Date: 2/19/2010  Requested Completion Time: 10:40

2/19/2010  10:40.16.000

Event Name:

The "Requested By" will receive emails when the work request status changes.

New Emergency WR option

Scheduled Event

Receive email when WR status changes option



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# Emergency WR Option

After selecting the **SUBMIT** button to request an Emergency WR, a pop up will display; The customer must select "Yes" to confirm.

Note: Email notifications will be sent to the Shop Supervisor/PA.

The screenshot shows a web-based form for submitting an Emergency Work Request. The form is divided into several sections: Requestor, Work Location, Equipment, and Description. A red arrow points from the 'Submit' button in the top right corner to a 'Confirm' pop-up dialog box. The dialog box contains a question mark icon and the following text: "You are about to submit an emergency Work Request. For immediate response, please contact the shop using information provided on the Overview page. Select Yes to proceed. If this is not an emergency please select No, then change to a different urgency level." Below the text are two buttons: "Yes" and "No".

Section	Field	Value
Requestor	Requested by:	DUFF, PAMELA (pduff)
	Contact Phone #:	7046874009
Work Location	Requested for:	[Dropdown]
	Department Code:	1240 (Facilities Management (Dpt))
	Sub Department Code:	13900 (Facilities Management AVC)
	Building Code:	0055 (Facilities Management & Police & Pu...)
	Floor Code:	02
	Room Code:	230 (Select Drawing)
Equipment	Equipment Code:	[Dropdown]
	Problem Location:	test
Description	Problem Type:	_OTHER
	Work Description:	TEST-EMERGENCY
Urgency		<input type="radio"/> Critical <input type="radio"/> Routine <input type="radio"/> No Urgency
Requested Completion Time:		10:40 (10:40.16.000)

The "Requested By" will receive emails when the work request status changes.



# Scheduled Events

Type in an Event name and select the Urgency of the WR.

**Note:** If you attempt to submit a scheduled event with less than 24 hour notice, an error will display.

The screenshot displays the 'Basic Information' tab of a Work Request form. The 'Requestor' section shows 'Requested by: DUFF, PAMELA (pduff)' and 'Contact Phone #: 7046874009'. The 'Work Location' section includes 'Department Code: 1240', 'Sub Department Code: 13900', 'Building Code: 0055', and 'Floor Code: 02'. The 'Description' section shows 'Problem Type: OTHER' and 'Work Description: TEST-EMERGENCY'. The 'Priority' section has 'Urgency' radio buttons for 'Emergency', 'Critical', 'Routine', and 'No Urgency', with 'Emergency' selected. The 'Requested Completion Date' is '1/20/2010' and the 'Requested Completion Time' is '10:40'. An error message dialog box is overlaid on the form, stating: 'Error! You are scheduling an event without giving 24 hours in advance. Please try again.' A red arrow points from the 'Urgency' field to the error message.



# WR Overview Page

Overview page lists:

1. WR details
2. Supervisor and PA names and phone numbers
3. Shop/zone

The screenshot shows the 'Overview' tab of a Work Request system. It contains several sections: 'Work Request', 'Requestor', and 'Work Location'. Red arrows point from the list on the left to specific fields in the 'Work Request' section: 'Supervisor's Name', 'Processing Assistant's Name', 'Shop/Zone Code', and 'Department Code'. A red circle highlights the 'Print Work Order' button in the top right corner.

Work Request	
Work Request Code:	2010016699
Supervisor's Name:	FRIAS, GEORGE (grfrias)
Processing Assistant's Name:	TEAL, PATRICIA (pdteal)
Shop/Zone Code:	MOZ05
Supervisor's Phone:	7046872124
Processing Assistant's Phone:	7046876096

Requestor	
Requested by:	DUFF, PAMELA (pduff)
Contact Phone #:	7046874009
Requested for:	

Work Location	
Department Code:	1240
Sub Department Code:	13900
Facilities Management AVC	
Floor Code:	02
Problem Location:	test

Equipment	
Equipment Code:	

Description	
Problem Type:	_OTHER
Description:	test

Priority	

Requested Completion Time	
	10:40 AM



# Submit Estimate Request Option

1. Selecting **YES** will Submit the Estimate Request to the Supervisor/PA for review.
2. Selecting **NO** will continue the WR as a regular work request.

Basic Information | Documents | **Overview**

**Work Request** Request Estimate | Print Work Order | i

Work Request Code:	2010010348	Shop/Zone Code:	MOZ05
Supervisor's Name:	FRIAS, GEORGE (grfrias)	Supervisor's Phone:	7046872124
Processing Assistant's Name:	ROMAN, DAVID (droman)	Processing Assistant's Phone:	7046873548

**Requestor** i

Requested by:	DUFF, PAMELA (pduff)	Contact Phone #:	7046874009
Requested for:			

**Work Location** i

**Equipment** i

**Description** i

Problem Type:	GND-SPECIALEVENT
Work Description:	Fair on campus; will need grounds assistance in setting up tents and tables.

**Priority** i

Work Request Priority:	Critical		
Requested Completion Date:	09/10/2009	Requested Completion Time:	6:00 PM
			6:00 PM
Event Name:	FAIR		

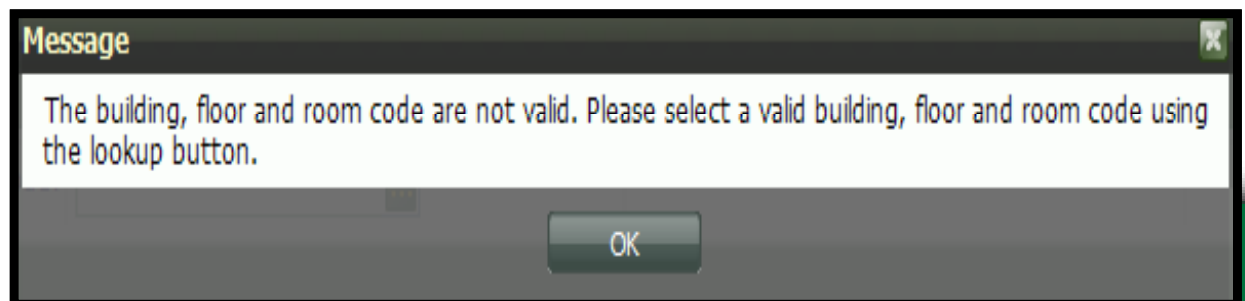
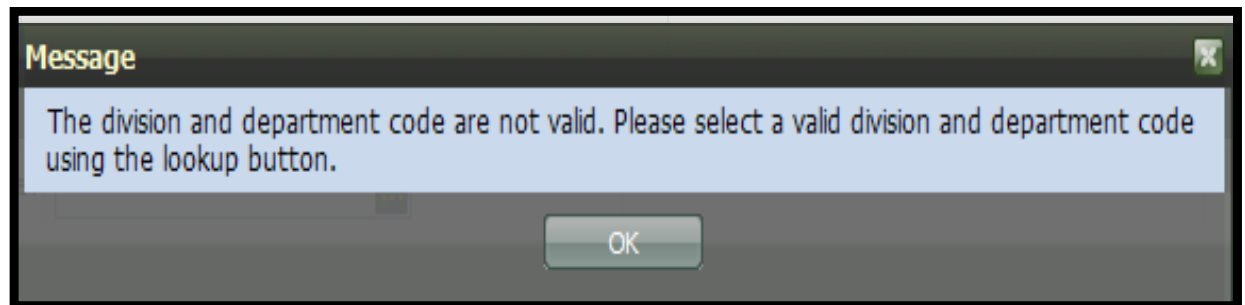


## Common Create WR Errors

1. An error will display if the Division code and Dept code are not valid. Clear out the fields and select the correct Dept code. The correct Division code should populate also.

2. An error will also display if the building floor and room code do not coordinate.

i.e. If a room was selected that is not affiliated with the selected building and floor.





# Facilities Operations Tasks

- Routed to Shop Supervisor
- Supervisor determines whether the service request is reimbursable or not.
- Request routed to FAM queue to review accounting information.



# FAM Role: Task List

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- Building Operations Management
- Building Operations
- Financial Account Manager

Tasks:

**Work Requests**

- Create Work Request
- Edit Work Request Description
- Receive Emails
- Approve Work Request
- Edit Account Codes on Work Request
- Edit Account Codes on Split Work Request
- Edit Account Codes on Split by Cost Type

**Preventive Maintenance**

- Approve Preventive Maintenance
- Edit Account Codes on PM Schedules
- Edit Account Codes on Split PM Schedules
- Edit Account Codes on PMS Split by Cost Type

**Reports**

- Review Work Request Awaiting Approval
- Review Active Work Requests
- Review Billed WR by Fund ID
- Review WR Awaiting Bill By Department
- Review WR Awaiting Bill By Fund ID
- PM Template Report
- Customer Post Billing Summary
- Review Function Labor Rates
- Non-Reimbursable Costs By Account
- Review WR by Banner Document #

**Support Information**

- FAM List
- Building Liaison List

FAM Task List  
reorganized into  
Sections for easier  
viewing and locating







# Approve Work Request

Tasks:

Processes

Work Requests

- Create Work Request
- Edit Work Request Description
- Approve Work Request
- Edit Account Codes on Work Request

“Search Work Requests” section

**Search Work Requests** Search Now | SH

From Work Request Code:  To Work Request Code:  Index/Fund Account:

Department Code:  Requested by:  Requested for:

Equipment Code:  Building Code:  Problem Type:

Work Request Code	Problem Type	Work Request Status
2009041016	EL-OTHER	Subn
2009041008	PL-TOILET	Subn
2009041007	PL-TOILET	Subn
2009040998	PL-DRAIN	Subn
2009040893	VEH-RESERVE	Subn
2009040880	_OTHER	Subn
2009040728	VEH-RESERVE	Subn
2009040722	VEH-OTHER	Subn
2009040698	VEH-RESERVE	Subn
2009039963	EL-OTHER	Subn
2009039689	VEH-OTHER	Subn
2009039308	VEH-RESERVE	Subn
2009039201	VEH-RESERVE	Subn
2009039025	VEH-RESERVE	Subn
2009038487	ST-UTILITYLOCATE	Subn
2009033375	KEY-OTHER	Subn
2009032424	VEH-RESERVE	Subn
2009017815	HVAC-OTHER	Subn
2009016914	EL-HOTWORKPERMIT	Subn
2008047531	HVAC-OTHER	Subn
2008038313	EL-POWER	Subn

**Edit Work Request Details** Approve | Reject

Work Request Code: 2009040998

Problem Type: PL-DRAIN

Requested for: SMITH, THOMAS (tsmith)

Work Request Status: Submitted

Requested by: SMITH, DAVID (desmith2)

Requestor's Phone #: 7045072850CELL

Building Code: 0029

Floor Code:

Room Code:

Problem Location:

Requested Completion Date:

Requested Completion Time:

Estimated Cost of Labor: 0.00

Estimated Other Costs: 0.00

Estimated Cost of Parts: 0.00

Estimated Cost of Shop Stock: 0.00

“Work Requests” section

“Edit Work Requests” section



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# Edit Account Codes on a Work Request

“Search Work Requests” section

Tasks:

Processes

Work Requests

- Create Work Request
- Edit Work Request Description
- Approve Work Request
- Edit Account Codes on Work Request

**Search Work Requests** Search Now Show All

From Work Request Code:  To Work Request Code:  Index/Fund Account:

Department Code:  Requested by:  Requested for:

Equipment Code:  Building Code:  Problem Type:

Work Urgency: No Urgency Shop/Zone Code:

---

**Work Requests**

Work Request Code	Problem Type
2009041012	KEY-LOCKDOOR
2009041004	VEH-OTHER
2009040973	PREVENTIVE MAINT
2009040971	PREVENTIVE MAINT
2009040970	PREVENTIVE MAINT
2009040952	FUEL
2009040945	FUEL
2009040944	FUEL
2009040931	FUEL
2009040930	FUEL
2009040926	FUEL
2009040924	FUEL
2009040922	FUEL
2009040921	FUEL
2009040919	FUEL
2009040917	VEH-RESERVE
2009040916	VEH-RESERVE
2009040914	VEH-RESERVE
2009040913	VEH-RESERVE
2009040910	EL-OTHER
2009040905	GND-SPECIALEVENT

---

**Edit Work Request Details** Save Cancel

Work Request Code: 2009041012

Problem Type: KEY-LOCKDOOR

Requested for:

Requested by: SMITH, NANCY (nmsmith)

Requestor's Phone #: 7046874285

Building Code: 1001

Floor Code:

Room Code:

Problem Location:

Requested Completion Date: March 25, 2009

Requested Completion Time:

Reimbursable / Split Funding:  Reimbursable  Split by Cost Type  Split Funding

Index/Fund Account\*: 334010

Banner Account Code\*: 928190

Description: Cone Deck Visitor Booth door lock fell apart. Door needs to be secured ASAP.

“Work Requests” section

“Edit Work Requests” section



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# HANDS ON TRAINING



# Hands on Practice

- Address: <http://fmbld03.uncc.edu:8080/archibus>
- Using Archibus Development Server
- Log in: Use NinerNet Username and Password
- Reviewing basic procedures of a FAM:
  - Approve,
  - Reject,
  - Editing Account Codes

The screenshot shows the Archibus login interface. At the top left, the word "ARCHIBUS" is displayed in a green box. In the top right corner, there is a link for "Sign-in Page Language:". Below this, the "Project:" field is set to "University of North Carolina at Charlotte - Main Campus". The main content area is a green box with the heading "Sign In" and the instruction "Sign in to your personalized list of activities and join the collaboration now." It contains two input fields: "NinerNET username:" and "NinerNET password:". Below these fields is a "Sign In" button. At the bottom of the green box, there is a checkbox labeled "Remember my username on this computer". Below the green box, there is a section titled "Archibus News & Events:" with a paragraph of text providing information about training classes, documentation, and a link to a customer feedback form.



- Test Server Link Located on FM Web at
- <http://fmbld03:8080/archibus/schema/ab-core/views/process-navigator/navigator-details.axvw>
- Sign In using NinerNet username and password

A screenshot of a web-based sign-in form. The form has a dark green background with white text and input fields. It includes a title 'Sign In', a subtitle, two input fields for 'user name' and 'password', a 'Sign In' button, and a checkbox for 'Remember my user name on this computer'.

**Sign In**  
Sign in to your personalized list of activities and join the collaboration now.

**Enter your user name:**

**Enter your password:**

Remember my user name on this computer



# Edit Work Request Description

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- Building Operations Management
- Building Operations
- Customer

Tasks:

Work Requests

- Create Work Request
- Request Work Request Cancellation
- Edit Work Request Description

Review Estimates

- Review/Approve Reimbursable Estimated Work Request


Work Request Code	Problem Type	Work Request Status
2009034897	EL-IN-LIGHT	Requested
2009034030	EL-OUT-LIGHT	Requested
2009033180	EL-POWER	Submitted
2009031291	EL-OUT-LIGHT	Requested
2009031290	EL-OUTLET	Submitted
2009031268	EL-IN-LIGHT	Issued and In Pr
2009031267	EL-IN-LIGHT	Issued and In Pr
2009031266	EL-IN-LIGHT	Submitted
2009030774	_OTHER	Requested
2009030465	EL-IN-LIGHT	Submitted

Work Request Details

Record was successfully saved

Work Request Code: 2009034897      Problem Location: Back corner of room

Windows Internet Explorer



Shop Supervisor(s) and Processing Assistant(s) have been notified of description update.

OK

Date Work Requested: March 26, 2009      Index/Fund Account:

Requested Completion Date: March 31, 2009      Banner Account Code:

Work Description: Light is out in the back corner of room.

[DUFF, PAMELA (pduff) Thu Mar 26 11:59:29 2009 (Status:R)] - Please note that there are two employees working in this area Mon-Fri from 8 am to 5 pm.

Update Description:

Description updates can be completed at any time before "Closed" Status.



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# Requesting Motor Fleet Reservations

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- Project Management
- Space Management
- Building Operations Management
- Environmental Sustainability
- Workplace Portal
- System Administration
- Motor Fleet**
- Capital Project

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- Motor Fleet
- Motor Fleet Customer

Tasks:

Forms

- Pre-Authorization Checklist
- Legal - Accident Procedures

Actions

- Motor Fleet Vehicle Rates
- Request a Vehicle
- Cancel Vehicle Reservation
- Review Reservations

Reports

- Reservations History
- Review Motor Fleet Log History
- Review Customer Motor Fleet Log History

# Create Motor Fleet Reservation

Motor Fleet tab is located on the main Archibus Activity menu.

**Request a Vehicle**

Request | Review | Submit

Requestor\*: DUFF, PAMELA (pduff)

Department Code\*: 1240      Sub Department Code\*: 13900

Driver\*: DINELLO, RAYMOND (rdin)      Destination\*: Scottsdale, AZ

Number of Personnel: 1      Vehicle Type:  Car  MiniVan  15-Passenger Van

Estimated Mileage\*: 1500      In/Out of State:  In-State  Out-of-State

Planned Pickup\*: 1/22/2010      Planned Pickup Time\*: 10:00  
January 22, 2010      10:00 AM

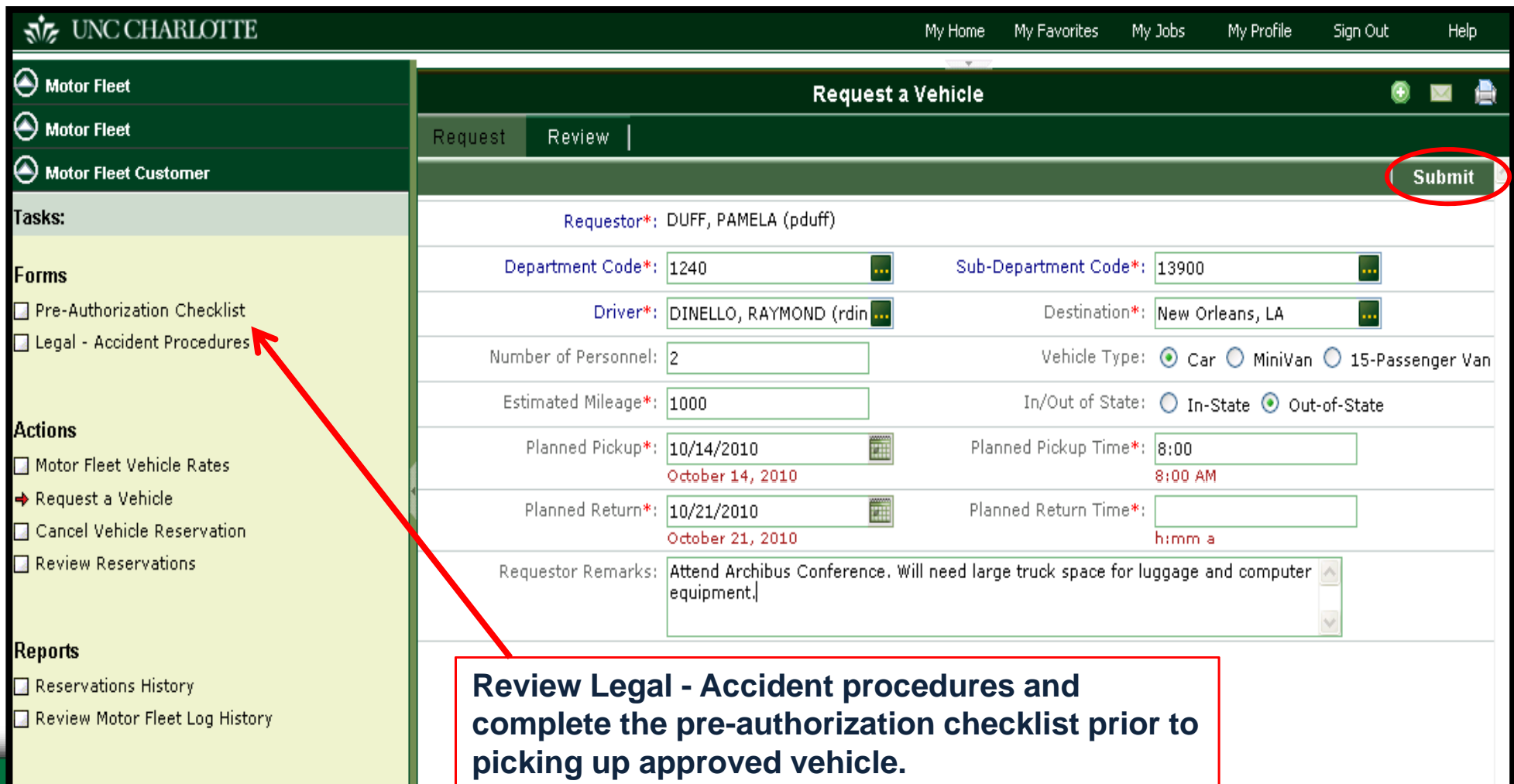
Planned Return\*: 1/29/2010      Planned Return Time\*: 12:00  
January 29, 2010      12:00 PM

Requestor Remarks: Will need a vehicle with lots of truck space for computer equipment and luggage.



# Request a Vehicle Reservation

After submitting request, the request will be sent for FAM approval and then to Motor Fleet for review/approval.



**Request a Vehicle**

Request | Review

**Submit**

Requestor\*: DUFF, PAMELA (pduff)

Department Code\*: 1240 Sub-Department Code\*: 13900

Driver\*: DINELLO, RAYMOND (rdin) Destination\*: New Orleans, LA

Number of Personnel: 2 Vehicle Type:  Car  MiniVan  15-Passenger Van

Estimated Mileage\*: 1000 In/Out of State:  In-State  Out-of-State

Planned Pickup\*: 10/14/2010 (October 14, 2010) Planned Pickup Time\*: 8:00 (8:00 AM)

Planned Return\*: 10/21/2010 (October 21, 2010) Planned Return Time\*: h:mm a

Requestor Remarks: Attend Archibus Conference. Will need large truck space for luggage and computer equipment.

**Review Legal - Accident procedures and complete the pre-authorization checklist prior to picking up approved vehicle.**



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# FAM: Approve Motor Fleet Reservations

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- Motor Fleet
- Motor Fleet

Processes or Roles:

- Motor Fleet Customer
- Motor Fleet Administrator
- Financial Account Manager

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- Motor Fleet
- Motor Fleet
- Financial Account Manager

Tasks:

- Approve Work Request
- Reservations History

Search Work Requests | Search Now | Show All

From Work Request Code: 2010059029 To Work Request Code: 2010059029 Index / Fund: ...

Sub-Department Code: ... Requested by: ... Requested for: ...

Equipment Code: ... Building Code: ... Problem Type: ...

Work Urgency: No Urgency Shop/Zone Code: ...

Status: ... Reimbursable: ...

Work Request Code	Problem Type	Work Request Status
2010059029	VEH-RESERVE	Submitted
2010057208	VEH-RESERVE	Submitted
2010055061	VEH-RESERVE	Submitted
2010055252	VEH-OTHER	Submitted
2010054953	VEH-RESERVE	Submitted
2010049006	VEH-LIGHTS	Submitted
2010048780	VEH-RESERVE	Submitted
2010048606	VEH-RESERVE	Submitted
2010044858	VEH-RESERVE	Submitted
2010044790	VEH-OTHER	Submitted

Edit Work Request Details

Work Request Code: 2010059029

Problem Type: VEH-RESERVE  
Vehicle Reservation

Requested for: DINELLO, RAYMOND (rdinello)

Work Request Status: Submitted

Requested by: DUFF, PAMELA (pduff)

Requestor's Phone #: 7046874009

Department Code: 1240  
Facilities Management (Dpt)

Sub-Department Code: 13900  
Facilities Management AVC

Building Code:

Floor Code:

Room Code:

Print | Approve | Reject | Cancel

Tasks:

Work Requests

- Create Work Request
- Edit Work Request Description
- Receive Emails
- Approve Work Request
- Edit Account Codes on Work Request
- Edit Account Codes on Split Work Request
- Edit Account Codes on Split by Cost Type

Preventive Maintenance

- Approve Preventive Maintenance
- Edit Account Codes on PM Schedules
- Edit Account Codes on Split PM Schedules
- Edit Account Codes on PMS Split by Cost Type

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# Approve Preventive Maintenance (PMs)

PM Schedule Code	Department Code	Building Code	PM Sched Status
3996	30000	0065	Submi
3984	12800	0014	Submi
3982	12800	0059	Submi

Edit Preventive Maintenance Accounting		Approve
PM Procedure*: FIRE SPRINKLER SYS		
PM Schedule Code: 3996		
Instructions*: Grease pump and motor, check for loose bolts and fittings. 1. Inspect automatic pump system is functional and the valves are in their correct position. 2. Insure the system is tamper resistant. valves are in their d		

Edit Preventive Maintenance Accounting		Approve	Reject	Cancel
PM Procedure*: V-NC INSP				
PM Schedule Code: 4228				
Instructions*: Inspection is to be done annually				
Procedure Type: Equipment				
Department Code: 1050				
Auxiliary Operations (Dpt)				
Sub Department Code: 10600				
Dining				
Function Code: AUTOMOTIVE				
Shop/Zone Code: MOA00				
Building Code: 0000				
Campus				
Floor Code:				
Room Code:				
Date for First PM: April 22, 2009				
Est. Hours to Complete: 0.00				
Fixed or Floating: Fixed				
Freq. 1 Interval: 1				
Interval Type: Years				
Comments:				
Reimbursable / Split Funding: <input checked="" type="radio"/> Reimbursable <input type="radio"/> Split by Cost Type <input type="radio"/> Split Funding				
Index/Fund Account: 330320				
Banner Account Code: 928190				
Required For Safety?: No				
Required Reason:				



# Selecting Split Funding

- When approving a WR, you have 3 options before finalizing the accounting

Reimbursable / Split Funding:	<input checked="" type="radio"/> Reimbursable	<input type="radio"/> Split by Cost Type	<input type="radio"/> Split Funding
Index/Fund Account:	<input type="text"/>		
Banner Account Code:	<input type="text"/>		

- **Note:** Once a WR has been approved you can only select Split by Cost Type or Reimbursable when editing account codes



# Split Funding

- Split Funding is now available for both PM Schedules and Work Requests
- You will be able to Split a work order's funding through:
  - Cost Type
  - Multiple Dept. Split
- If you do not choose to use Split Funding, you can select Reimbursable
  - This will cause the work order to proceed through accounting normally.



# Facilities Operations Tasks

- Work is executed
- Time, Materials and other charges are assigned to the work request.
- Work is closed out
- FBO performs the billing



# FAM PM Approval

- When approving the schedule/work order for Preventive Maintenance you will have three options for accounting as well

Reimbursable / Split Funding:	<input checked="" type="radio"/> Reimbursable	<input type="radio"/> Split by Cost Type	<input type="radio"/> FAM-PU for Split Funding
Index/Fund Account:	<input type="text"/>		
Banner Account Code:	<input type="text"/>		

- **Note:** Once you approve the schedule, the only accountings that can be changed are reimbursable PMs. Even then you can only request that the schedule be split by cost type.



# FAM Receive Email Notifications

UNC CHARLOTTE

- Building Operations Management
- Building Operations
- Financial Account Manager

Tasks:

Work Requests

- Create Work Request
- Edit Work Request Description
- Receive Emails
- Approve Work Request
- Edit Account Codes on Work Request
- Edit Account Codes on Split Work Request
- Edit Account Codes on Split by Cost Type

Financial Account Manager

Financial Account Manager	Receive Emails	
DUFF, PAMELA (pduff)	Yes	

FAM Receive Emails

Financial Account Manager\*: DUFF, PAMELA (pduff)

Receive Emails:

Save Cancel

If you are a Primary FAM, you will always receive emails.

2<sup>nd</sup>, 3<sup>rd</sup>, or 4<sup>th</sup> FAMs may, however, select “No” to discontinue email notifications. Select **SAVE** button to save changes.





# Reports

- Archibus contains many useful reports for keeping track of a work order, craftsperson, or even billing.
- Some reports that we will cover:
  - Review WR Awaiting approval
  - Review Active WR
  - View Billed WR
  - Review WR Awaiting Bill by Dept
  - Review WR by Banner Document Number
  - Support Information
    - FAM list
    - Building Liaison list



# Review WR Awaiting Approval

Work Requests		
Work Request Code	Problem Type	Work Request Status
2009041029	HVAC-OTHER	Requested
2009041016	EL-OTHER	Submitted
2009041008	PL-TOILET	Submitted
2009041007	PL-TOILET	Submitted
2009041003	EL-FIREALARM	Requested
2009040998	PL-DRAIN	Submitted
2009040987	PREVENTIVE MAINT	Rejected
2009040986	PREVENTIVE MAINT	Rejected
2009040985	PREVENTIVE MAINT	Rejected

Work Request Details	
Work Request Code:	2009041029
Problem Type:	HVAC-OTHER
Work Request Status:	Requested
Requested by:	BOICE, ERIK (eboice)
Requested for:	
Requestor's Phone #:	7046872196
Building Code:	0045
Floor Code:	04

Work Request Details	
Work Request Code:	2009041029
Problem Type:	HVAC-OTHER
Work Request Status:	Requested
Requested by:	BOICE, ERIK (eboice)
Requested for:	
Requestor's Phone #:	7046872196
Building Code:	0045
Floor Code:	04
Room Code:	
Problem Location:	
Date Work Requested:	March 25, 2009
Requested Completion Date:	March 25, 2009
Shop/Zone Code:	MOZ05
Equipment Code:	
Index/Fund Account:	
Banner Account Code:	
Description:	replace heater coil in ceiling

Review information on  
a recently submitted  
WR



# Review Active WR

- Review advanced information:
- WR Audit External Charges
- CF Assignments
- CF Notes
- FAM that approved WR

Work Request		Close
Work Request Code:	2009041002	
Shop/Zone Code:	MOZ06	
Problem Type:	HVAC-OTHER	
PM Procedure:		
PM Schedule Code:		
Work Description:	repair consenate pump, this work request replace 2009035559.	
Craftsperson Notes:		
Work Request Status:	Issued and In Process	
Requested by:	SAWYER, MARGARET (masawyer)	
Requestor's Phone #:	7046872151	
Building Code:	0042	
Floor Code:		
Room Code:		
Problem Location:		
Date Work Requested:	March 25, 2009	
Date to Perform:		
Date Work Completed:		
Division Code:	1240	

Work Request Labor Assignments									
Craftsperson Code	Date Craftsperson Assigned	Estim. Hours	Function Code	Function Level	Total Hours	Total Labor Cost	Assign By	Work Request Code	
SJSINGER	3/23/2009	0.00	HVAC	1	0.00	0.00	SAWYER, MARGARET (MASAWYER)	2009041002	
PHALTMAN	3/23/2009	0.00	HVAC	1	0.00	0.00	SAWYER, MARGARET (MASAWYER)	2009041002	

Work Request SDI Stock Parts									
Line Number	Part Code	Part Status	Quantity Estimated	Quantity Used	Total Parts Cost	Work Request Code	Date Part Assigned	Part Classification	Part Description
No records to display.									

Work Request SDI Non-Stock Parts								
Line Number	Non Stocked Item	Non Stocked Item Description	Part Status	Date Part Assigned	Estimated Cost	Actual Cost	Work Request Code	
No records to display.								

Work Request External Charges							
Line Number	Charge Type	Description For Estimated Cost	Cost Estimated	Description For Actual Cost	Cost Actual	Last Updated By:	Work Request Code
No records to display.							

Work Request Audit			
Employee Name	Change Description	Date Changed	Work Request Log ID
SAWYER, MARGARET (masawyer)	Work Request Created	3/25/2009	141695
SAWYER, MARGARET (masawyer)	Issue Work Requests	3/25/2009	141697



# View Billed WR

Review information about completed & billed WR:

- Total costs
- Labor assignments
- Parts used
- Labor costs

Work Request		Close
Work Request Code:	2009039375	
Shop/Zone Code:	MOZ04	
Problem Type:	EL-POWER	
Work Description:	Assisted Nate on Tuesday March 10th with power problem to the card reader on the lobby doors.	
Craftsperson Notes:		
Work Request Status:	Completed	
Requested by:	SMITH, DAVID (desmith2)	
Requestor's Phone #:	7046877507	
Building Code:	0545	
Floor Code:		
Room Code:		
Problem Location:	LODDY DOORS	
Date Work Requested:	March 13, 2009	
Date to Perform:		
Date Work Completed:	March 16, 2009	
Division Code:	2700	
Department Code:	29700	
Index/Fund Account:	330510	

Work Request Labor Assignments										
Craftsperson Code	Date Craftsperson Assigned	Estim. Hours	Function Code	Total Hours	Total Labor Cost	Work Request Code	Time Craftsperson Assigned	Craftsperson Name		
DROMAN	3/10/2009	0.00	ELEC	4.00	121.68	2009039375	07:11 AM	ROMAN, DAVID		
SGREIS	3/10/2009	0.00	ELEC	4.00	121.68	2009039375	07:11 AM	REIS, STEVEN		

Work Request Part Usage										
Line Number	Part Code	Assignment Status	Quantity Estimated	Quantity Used	Total Parts Cost	Work Request Code	Date Part Assigned	Time Part Assigned	Part Classification	Part Description
No records to display.										

Work Request Other Resources										
Line Number	Non Stocked Item	Non Stocked Item Description	Assignment Status	Date Part Assigned	Estimated Cost	Actual Cost	Work Request Code			
No records to display.										

Work Request External Charges										
Line Number	Charge Type	Description For Estimated Cost	Cost Estimated	Description For Actual Cost	Cost Actual	Last Updated By:	Work Request Code			
No records to display.										

Work Request Audit										
Employee Name	Change Description	Date Changed	Work Request Log ID							
SMITH, DAVID (desmith2)	Work Request Created	3/13/2009	136124							
SMITH, DAVID (desmith2)	Submit Work Request	3/13/2009	136126							
SHERRILL, LORI (lasherr1)	FAM: Approve Work Request	3/13/2009	136288							
SMITH, DAVID (desmith2)	Issue Work Requests	3/13/2009	136297							
HEFTI, REBECCA (rhefti1)	Work Request Completed	3/16/2009	137310							
HEFTI, REBECCA (rhefti1)	Ready to be Finalized	3/16/2009	137312							
PEREZ, SONIA (sperez6)	FRO: Locked Bill	3/17/2009	138125							



# FAM List

**Note:** Hidden Mini Console accessible by scrolling the mouse over column heading

Review the names of all FAM's in every department

Financial Account Manager List				
Financial Account Manager By Department				
Department Code	Sub-Department Name	Financial Account Manager - Pri	Financial Account Manager - Sec	Third Financial Account Manager
	Chancellor	BRADY, DONNA (dcbrody)	HILL, CRIS (cfhill)	RAMPEY, CONNIE (caram)
10100	Chancellor Emeritus	DEESE, ELAINE (etdeese)		
10200	Board of Trustees	BRADY, DONNA (dcbrody)	HILL, CRIS (cfhill)	RAMPEY, CONNIE (caram)
10250	General Counsel	BRADY, DONNA (dcbrody)	TURNER, PATRICIA (paturner)	
10275	Planned Giv, Pub Event & Info			
10300	Business Affairs VC	KESSLER, ALICE (akessler)	BOLEN, CATHERINE (cpbolen)	TATUM, NELDA (natatum)
10400	Business Services AVC	TATUM, NELDA (natatum)	SMITH, THOMAS (tsmith)	
10500	Auxiliary Operations	CORONEL, ELSA (eicorone)	GALLENO, RAYMOND (regallen)	WHITE, SARAH (smwhite)
10600	Dining	CORONEL, ELSA (eicorone)	GALLENO, RAYMOND (regallen)	WHITE, SARAH (smwhite)
10601	Dining-Contractor Billing	JOHNSON, PAUL (ppjohnso)	REINECKE, PAUL (preineck)	CORONEL, ELSA (eicoron)
10700	Bookstore	CORONEL, ELSA (eicorone)	GALLENO, RAYMOND (regallen)	WHITE, SARAH (smwhite)
10701	Bookstore-Contractor Billing	GRINNELL, JIMMY (jegrinne)	WHITE, SARAH (smwhite)	
10800	Vending	PROPHIT, JO (jnprophi)	CORONEL, ELSA (eicorone)	WHITE, SARAH (smwhite)
10900	Reprographics	PROPHIT, JO (jnprophi)	CORONEL, ELSA (eicorone)	WHITE, SARAH (smwhite)
11000	49er Card Services	WHITE, SARAH (smwhite)	LAZENBY, JANIS (jlazenby)	CORONEL, ELSA (eicoron)
11100	Mail Services	LYTCH, HORACE (hlytch)	RICE, LAURA (llrice)	TATUM, NELDA (natatum)
11200	Parking & Transportation Services	HARTSELL, NANCY (nfhartse)	CATON, GARY (gacaton)	TATUM, NELDA (natatum)
11300	Printing			
11400	Financial Services AVC	HUGHES, JULIE (jrhughes)	LAROCCA, ALICE (avlarocc)	
11500	Budget	HIGH, SHERRIE (srhigh)	SMITH, KENNETH (ksmith46)	HUGHES, JULIE (jrhughes)
11600	Controller	HUGHES, JULIE (jrhughes)	LAROCCA, ALICE (avlarocc)	
11700	Accounts Payable	HUGHES, JULIE (jrhughes)	LAROCCA, ALICE (avlarocc)	
11800	Cashiers	HUGHES, JULIE (jrhughes)	LAROCCA, ALICE (avlarocc)	
11900	General Accounting	HUGHES, JULIE (jrhughes)	LAROCCA, ALICE (avlarocc)	
12000	Payroll	HUGHES, JULIE (jrhughes)	LAROCCA, ALICE (avlarocc)	



# Building Liaison List

View contact information for a specific building on Campus.

Building Code	Building Name	Building Abbreviation	Building Contact
0000	Campus		
0001	Kennedy	KNNDY	
0002	Macy	MACY	PALMER, JOYE (jpalmer)
0003	Facilities Management Storage Building	MSTOR	
0004	Atkins	ATKNS	REYNOLDS, MARK (mdreynol)
0005	Cone University Center	CONE	MERCK, DONNA (dlmerck)
0006	Heating Plant	HEAT	
0007	Oil Storage Tanks	OILTK	
0008	Denny	DENNY	THOMAS, HENRIETTA (hlthomas)
0009	Garinger	GRNGR	BASINGER, JULIE (jbasinge)
0010	Winningham	WINNH	STRASSBERG, ROY (rstrassb)
0011	King	KING	
0012	Smith	SMITH	ROWE, DANIEL (dnrowe)
0013	Belk Tower	BELKC	
0014	Receiving/Stores	MSHOP	
0015	Summer Programs	ALUMN	
0016	Barnard	BRNRD	BRADLEY, JINNY (jgbradle)
0017	Belk Gymnasium	GYMNS	SHOOK, FORREST (fmshook)
0018	Brocker	BROCK	WALTERS, JOSHUA (jwalter)
0019	Rowe	ROWE	KAPERONIS, GEORGE (gkaperon)
0020	McEniry	MCEN	BENDER, JOHN (jfbender)
0021	Grounds And Gnds Storage	GRND	
0022	Solvent Storage	SOLVT	
0023	Facilities Operations & Parking Services	PHYPL	
0024	Athletic Storage	ATHST	

Note: Hidden Mini Console



# Review WR Awaiting Bill by Dept.

Review information about WR ready to be billed and closed.  
– Filtered by Department and Division Code

Work Requests Waiting Billing To Be Billed By Department											
Work Request Code	Department Code	Sub Department Code	Index/Fund Account	Banner Account Code	Requested by	Requested for	Building Code	Floor Code	Room Code	Problem Location	Date Work Requested
2010016624	1140	12800			DEAL, EVA (ejdeal)	FORREST, CHARDEL (cforres5)	0014			SDI	10/2/2009
2010016614	1060	11100			DORAZIL, BARBARA (bsdorazi)	DORAZIL, BARBARA (bsdorazi)	0048	01	124	BREAK ROOM	11/6/2009
2010016612	1050	11000			SMITH, DAVID (desmith2)	SMITH, THOMAS (tlsmith)	0039				3/5/2009
2010016611	1050	10800			SMITH, DAVID (desmith2)	SMITH, THOMAS (tlsmith)	0039				3/5/2009
2010016610	1050	10500			SMITH, DAVID (desmith2)	SMITH, THOMAS (tlsmith)	0039				3/5/2009
2010016415	1040	10400	330121	105710	DANG, HAI (hdang12)		0055	02	232		10/20/2009
2010016414	1090	11400	330121	928250	DANG, HAI (hdang12)		0055	02	232		10/20/2009
2010015100	2700	29700	330510	931025	BURKETTE, DAVID (dlburket)		0066				11/16/2009
2010012588	1240	13900			DANG, HAI (hdang12)		0055	02			10/9/2009
2010012196	9999	K0009			CHAMPION, DAVID (dchampi4)	CURTIS, SUE (SYXKATS)	5001	04	4239	4th floor Reese	10/2/2009
2010012064	1240	13900	118110	928340	DUFF, PAMELA (pduff)	DINELLO, RAYMOND (rdinello)					9/30/2009
2010011392	9999	K0003			SINGER, STEVEN (sjsinger)	CHAMPION, DAVID (dchampi4kn)	5001				9/25/2009
2010009782	2380	27300	118110	928340	EVANS, YVONNE (yevans)	PEACOCK, KELLEY (keperkin)					8/31/2009
2010009282	1240	13900	139861	948340	MOSELEY, NIKI (nsmosele)		0068				8/28/2009
2010009279	1240	13900	139861	948340	MOSELEY, NIKI (nsmosele)		0068				8/28/2009
2010009118	1520	18000	118110	928340	TOSCANO, AARON (atoscano)	TOSCANO, AARON (atoscano)					8/27/2009
2010009106	1240	13900	336485	928180	BURT, WARNER (wsburt)		0035				8/27/2009
2010009105	1240	13900	336485	928180	BURT, WARNER (wsburt)		0035				8/27/2009
2010009050	1250	14700	118551	931025	Fuel, Master (fmarchibus)		0066				8/25/2009
2010009049	1250	14700	118551	931025	Fuel, Master (fmarchibus)		0066				8/25/2009
2010009048	1250	14700	118551	931025	Fuel, Master (fmarchibus)		0066				8/25/2009
2010009039	2700	29700	330510	931025	THORNTON, GENE (gthornt1)		0066				8/26/2009
2010009038	2700	29700	330510	931025	THORNTON, GENE (gthornt1)		0066				8/26/2009
2010008785	2660	29110	336313	931025	MOULTON, SCOTT (sdmoulto)		0066				8/24/2009
2010008308	1280	15000	118100	931025	MACON, HATTIE (hjmacon)		0066				8/21/2009



- Building Operations Management
- Building Operations
- Financial Account Manager

Tasks:

Reports

- Review Work Request Awaiting Approval
- Review Active Work Requests
- Review Billed WR by Fund ID
- Review WR Awaiting Bill By Department
- Review WR Awaiting Bill By Fund ID
- PM Template Report
- Customer Post Billing Summary
- Review Function Labor Rates
- Non-Reimbursable Costs By Account
- Review WR by Banner Document #

# Review WR by Banner Document Number

Fupload / Banner WR History Report

Fupload Date: \* 8/19/2009

Apply User Restriction | **XLS** | **Print Work Order**

Fupload Date	Banner Document	Work Request Code	Index/Fund Account	Banner Account Code	Work Description
8/19/2009	DL003197	<input type="checkbox"/>			
8/5/2009	DL0031710	<input checked="" type="checkbox"/>	2010004533	101520	928180
8/4/2009	DL003165				Offices (333G, 333F and 333E) need to be made t...
7/15/2009	DL003141				
7/2/2009	DL003143				
6/24/2009	DL003089				
6/16/2009	DL003073				
6/3/2009	DL003044				
6/2/2009	DL003012				
6/1/2009	KANNAPOLIS				
5/15/2009	DL002946	<input type="checkbox"/>	2010004841	336500	928270
5/12/2009	KANNAPOLIS				SAC 2nd floor: Investigate smell in duct work.

After marking the items for your report, select the **XLS** or **PDF** button to export the data into a report view.

uncc-fam-fupload-banner-report16\_11\_146FFA9DFD239441985E748B7B93A63063 [Read-Only]

	A	B	C
1	WR History for this Fupload Date		
2			
3	Work Request Code	Index/Fund Account	Banner Account Code
4	2010011693	116188	925140
5	2010011723	116188	925140
6	2010011691	116188	925140
7			
8			
9			



# Review WR by Banner Document Number

Fupload / Banner WR History Report

Fupload Date: 8/19/2009

Fupload Date	Banner Document	Work Request Code	Index/Fund Account	Banner Account Code	Work Description
8/19/2009	DL003197				
8/5/2009	DL0031710	2010004533	101520	928180	Offices (333G, 333F and 333E) need to be
8/4/2009	DL003165	2010005865	139223	928180	Exterior office door to suite 122 has shifte
7/15/2009	DL003141	2010005116	139223	928180	Sink clogged, men started work on it on 7
7/2/2009	DL003143	2010006854	139223	928180	Electrical outlets and light switches need t

Work Request

Work Request Code: 2010004533

Index/Fund Account: 101520

Banner Account Code: 928180

Request Type: BUILDING OPERU

Is this WR reimbursable?: Yes

Problem Type: KEY-LOCKKEY

Lock or Key problem

Work Request Status: Completed

Bill Date: 08/19/2009

FUPLOAD Date: 08/19/2009

Document 2: [ ]

Document 4: [ ]

Print

Select the Work Request code to display/view the WR details.

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Work Request Details

Work Request		
Work Request Code	2010004533	Work Request Priority
Work Request Type	BUILDING OPERATION	Shop/Zone Code
Requested By	NOTHNAGEL, GRETA (gnothnag)	Requestor's Phone #
Requested Completion Date	07/27/2009	Requested Completion Time
Work Request Status	Completed	Funding Type

Description	
Description	Problem Type
Offices (333G, 333F and 333E) need to be made to fit master key 5062. Office 310A need to have the locks changed due to one faculty member leaving and another arriving to take the office on 7/28/09. The former faculty member did not return his keys and it is critical the locks are changed asap. 310A already fits to master key 5062.	KEY-LOCKKEY

fit master key 5062. Office 310A need to have the l  
another arriving to take the office on 7/28/09. The for  
tical the locks are changed asap. 310A already fits to

Department Code: 2000

Assigned to Work Order: 101639

Equipment Code:

Date In Service:

Time in Service:

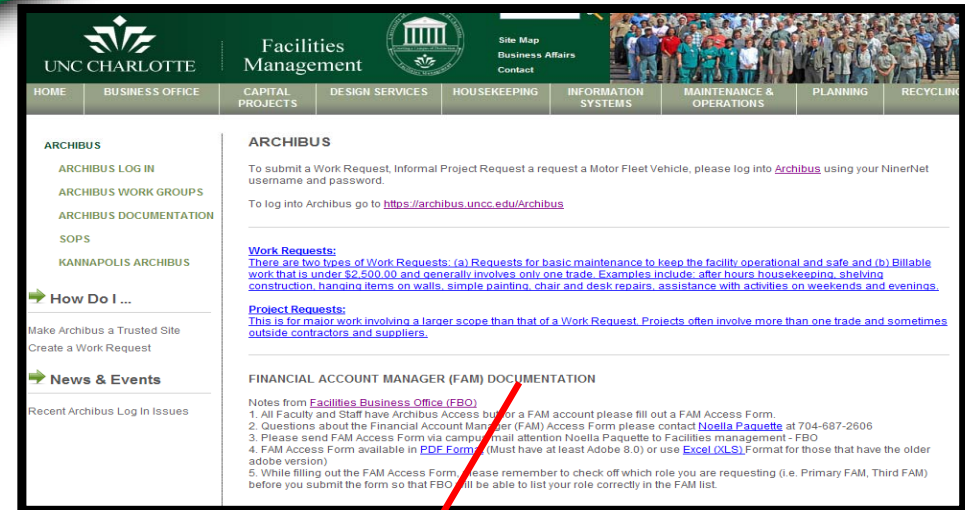


UNC CHARLOTTE

# How to Add/Update a FAM Within Your Department

On the Facilities Management Archibus Home page:

<http://facilities.uncc.edu/Archibus>



Fill out a FAM access form and send it to Noella Paquette (FBO)

Remember to select which FAM role (Primary, 4<sup>th</sup>, etc.) and fill out as many fields as possible

## FINANCIAL ACCOUNT MANAGER (FAM) DOCUMENTATION

Notes from [Facilities Business Office \(FBO\)](#)

1. All Faculty and Staff have Archibus Access but for a FAM account please fill out a FAM Access Form.
2. Questions about the Financial Account Manager (FAM) Access Form please contact [Noella Paquette](#) at 704-687-2606
3. Please send FAM Access Form via campus mail attention Noella Paquette to Facilities management - FBO
4. FAM Access Form available in [PDF Format](#) (Must have at least Adobe 8.0) or use [Excel \(XLS\)](#) Format for those that have the older adobe version)
5. While filling out the FAM Access Form, please remember to check off which role you are requesting (i.e. Primary FAM, Third FAM) before you submit the form so that FBO will be able to list your role correctly in the FAM list.



# Updates to Dept FAM Role

- **Please Note:** Primary FAMs should ensure a Secondary FAM is listed for their departments as back-up coverage if the Primary person is on leave.
- Also if an assigned FAM leaves the department, the replacement must submit the FAM Access Form to update their department prior to needing a work request approval.



UNC CHARLOTTE

# HANDS ON TRAINING



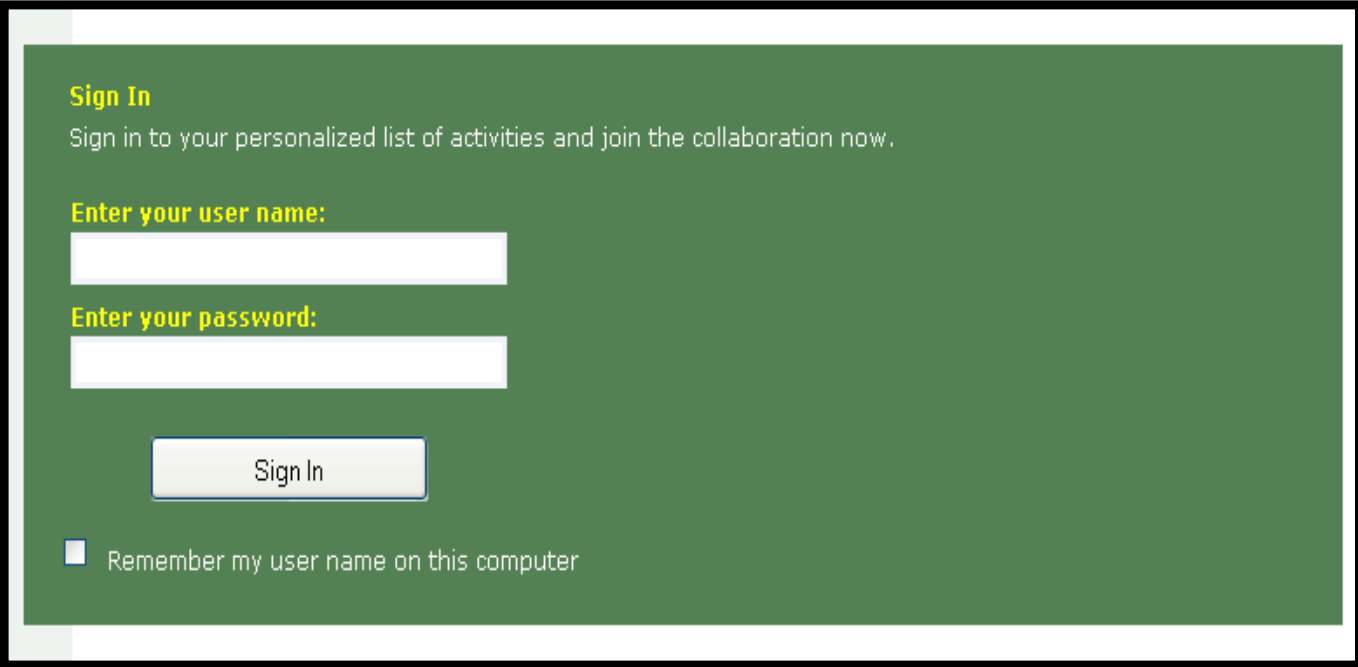
# Hands on Practice

- Address: <http://fmbld03.uncc.edu:8080/archibus>
- Using Archibus Development Server
- Log in:  
Use NinerNet Username and Password
- Reviewing Motor Fleet Reservations Request/Approvals
- Reports

The screenshot shows the Archibus login interface. At the top left, the word "ARCHIBUS" is displayed in a green box. At the top right, there is a link for "Sign-In Page Language:". Below this, the "Project:" is identified as "University of North Carolina at Charlotte - Main Campus". The main content area is a green box with the heading "Sign In" and the instruction "Sign in to your personalized list of activities and join the collaboration now." It contains two input fields: "NinerNET username:" and "NinerNET password:". Below these fields is a "Sign In" button and a checkbox labeled "Remember my username on this computer". At the bottom of the page, there is a section titled "Archibus News & Events:" with a paragraph of text providing information about training classes and documentation updates, including links to "Archibus Home Page", "Facilities Management", "Archibus Documentation", and "customer feedback form".



- Test Server Link Located on FM Web at
- [http://facilities.uncc.edu/Archibus/training\\_login.asp](http://facilities.uncc.edu/Archibus/training_login.asp)
- Sign In using NinerNet username and password

A screenshot of a web-based sign-in form. The form has a green background and contains the following elements:

- Sign In** (Section Header)
- Sign in to your personalized list of activities and join the collaboration now.
- Enter your user name:** (Label) followed by a white text input field.
- Enter your password:** (Label) followed by a white text input field.
- Sign In** (Submit Button)
- Remember my user name on this computer (Checkbox)



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# Questions and Concerns





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# Facility Information Systems

## Points of Contact:

- **Pamela Duff**      [pduff@uncc.edu](mailto:pduff@uncc.edu)      704-687-0552
- Ray Dinello      [rdinello@uncc.edu](mailto:rdinello@uncc.edu)      704-687-0551
- Shu Wang      [shwang@uncc.edu](mailto:shwang@uncc.edu)      704-687-0556
- Dionte Sims      [dmsims@uncc.edu](mailto:dmsims@uncc.edu)      704-687-0555
- David Champion      [dchampi4@uncc.edu](mailto:dchampi4@uncc.edu)      704-687-0550