ARCHIBUS: FM 311 Customer Workplace Portal

The ARCHIBUS FM 311 Customer Workplace portal view provides a new user experience and supports mobile device use. The new customer portal provides the ability to easily and quickly submit work requests, motor fleet vehicle reservations, project intake requests, key/card access requests, and space requests/discrepancies. Customers may also easily check the status of their active requests and request cancellations. In addition to the new FM 311 Customer Portal, users may continue to use the ARCHIBUS full desktop view at http://archibus.uncc.edu/.
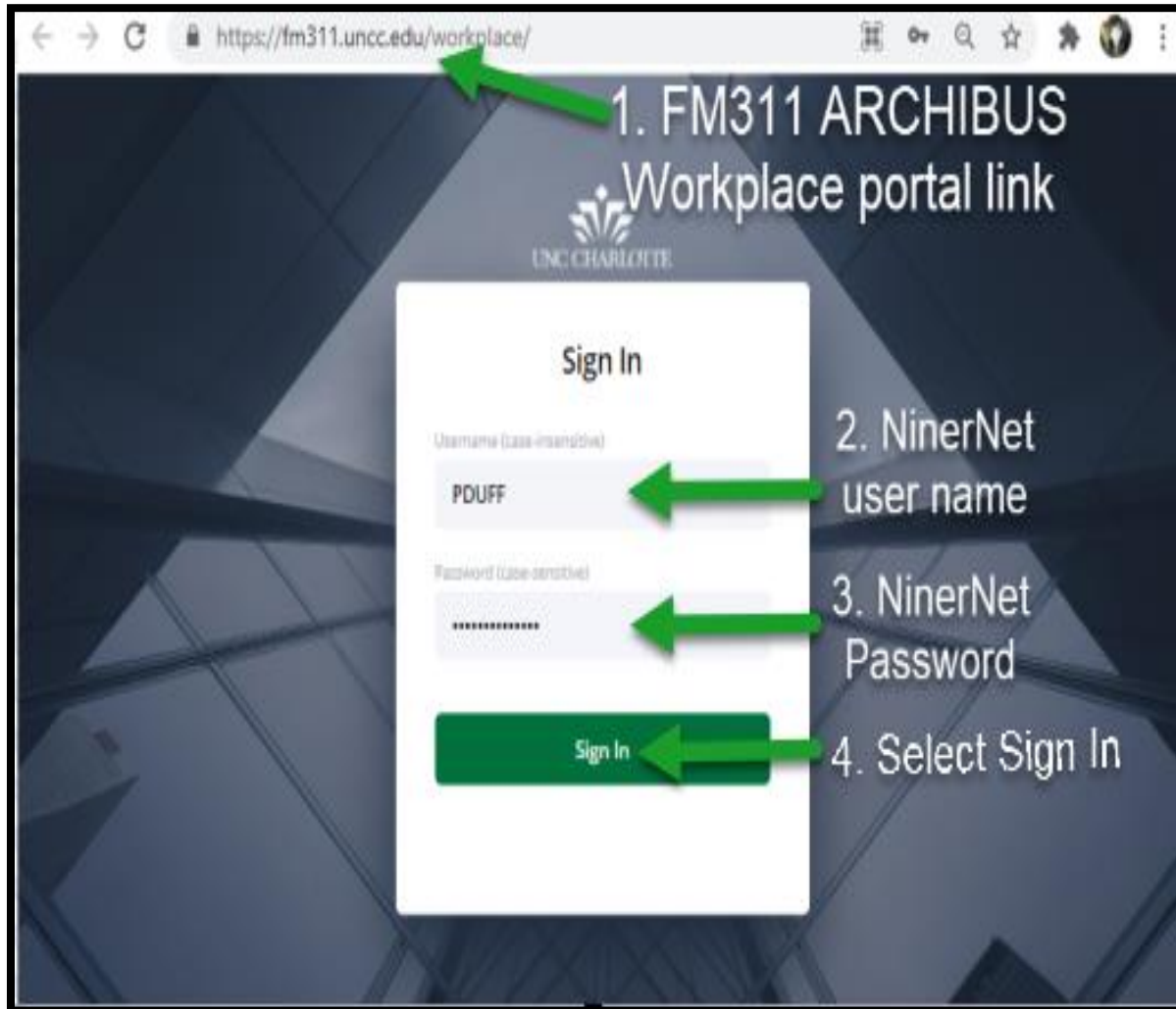
**As of March 3, 2021, all customer submitted work requests will route directly to FM 311. FM 311 personnel will route work requests accordingly to the appropriate area or shop.

Section 1: New ARCHIBUS FM 311 Workplace Portal:

1. **Accessing the FM 311 Customer Workplace Portal:**

The sign in option for customers to ARCHIBUS FM 311 portal view provides a slightly different look.
To access the new workplace portal, go to https://fm311.uncc.edu/workplace/. Users will still use their NinerNet credential to access the application.

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2. FM 311 Customer Portal View:

Once logged into the portal, a list of options will display for user request submissions or the ability to review previously submitted requests. The layout of the view and button selection option will depend upon the device in use.

2a. Mobile view:

A list format for the request options will display for mobile device or a smaller screen view.
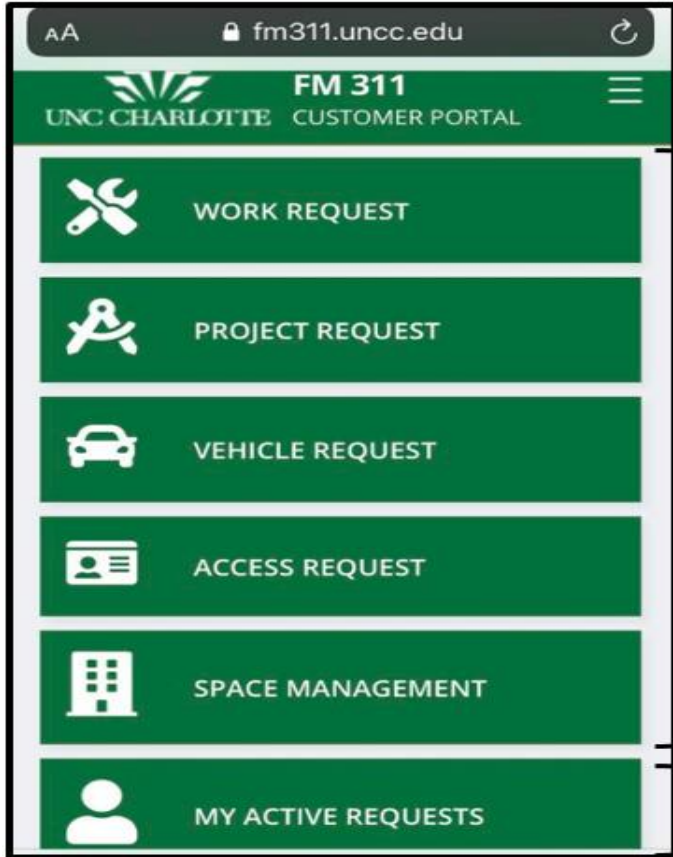
Options:

1. Submit *Work Request*
2. Submit *Project Request*
3. Submit Motor **Fleet** *Vehicle Request*
4. Submit *Access Request*: Key or Card
5. **Space Management**: Request Space
   Submit Space Discrepancy

My Active Requests **Options – User's Active Requests:**

1. View all your requests and status
2. Request Cancellations (for specific type requests if not queued for billing)
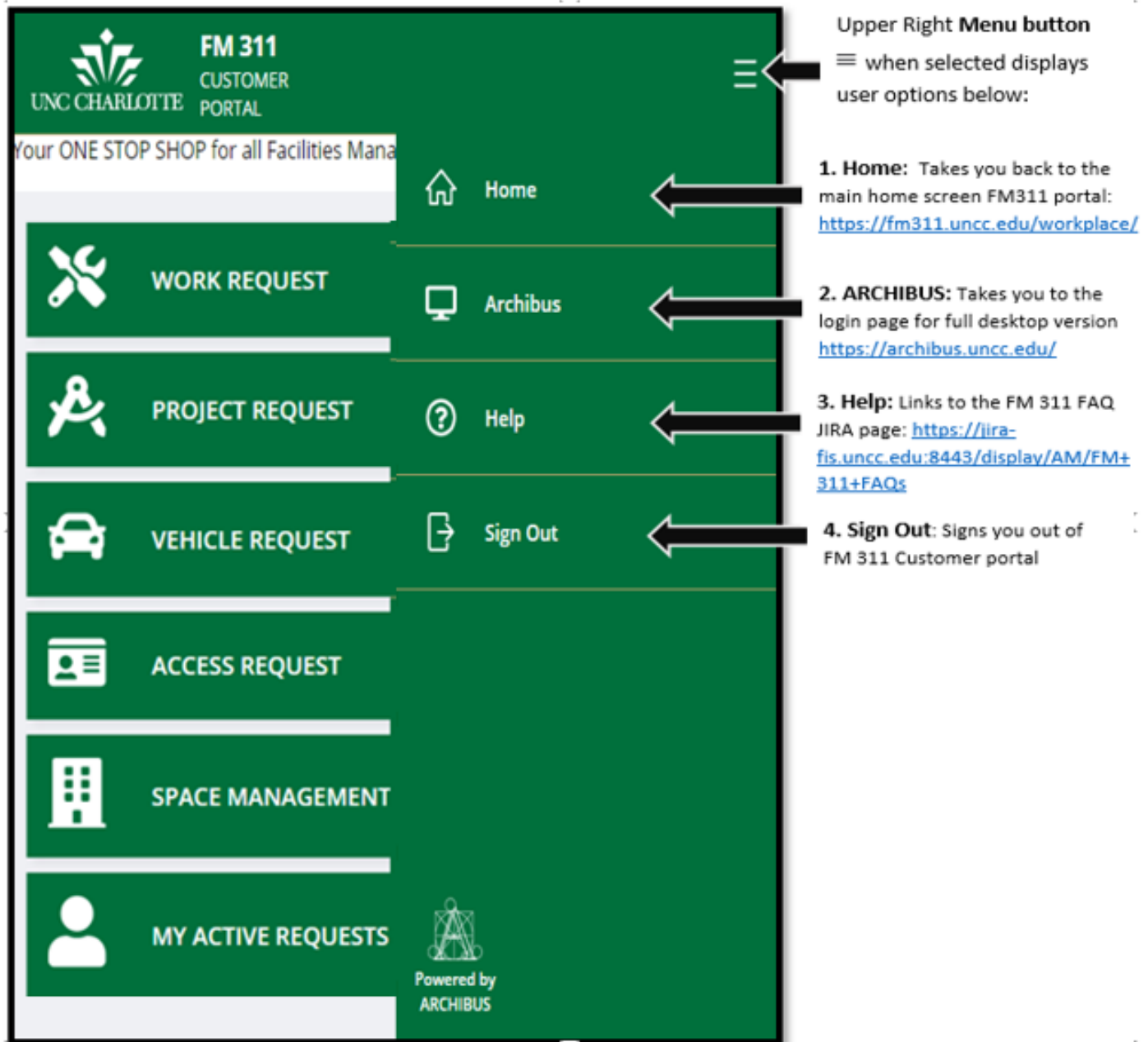
2b. Desktop or Laptop view:

The icons will display in a larger grid format for desktop view versus the list shown above.

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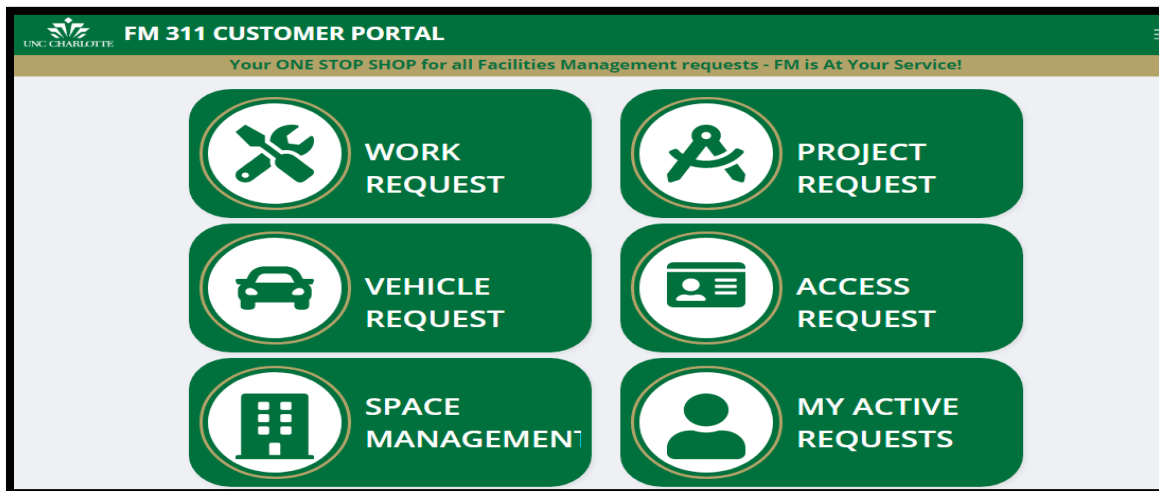
3. Menu Button Options:

The Menu button ≡ located in the upper right of the FM 311 Customer portal view provides users several options when selected:

a. **Home:** Action button takes the user back to the original FM311 portal view when they are in another screen.
b. **ARCHIBUS:** Takes user to the log in page for ARCHIBUS desktop version https://archibus.uncc.edu/
c. **Help:** Takes user to the FAQ page for FM 311: https://jira-fis.uncc.edu:8443/display/AM/FM+311+FAQs
d. **Sign out:** Signs user out of the FM 311 Customer portal view and displays the login view.

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4. My Requests:

All active request may be viewed from the *My Requests* option. Specific requests, Work Requests, Vehicle Requests, and Access Requests, will have the option for a cancellation request to be sent to the area. The cancel option will only display prior to the request being marked completed and ready for bill.
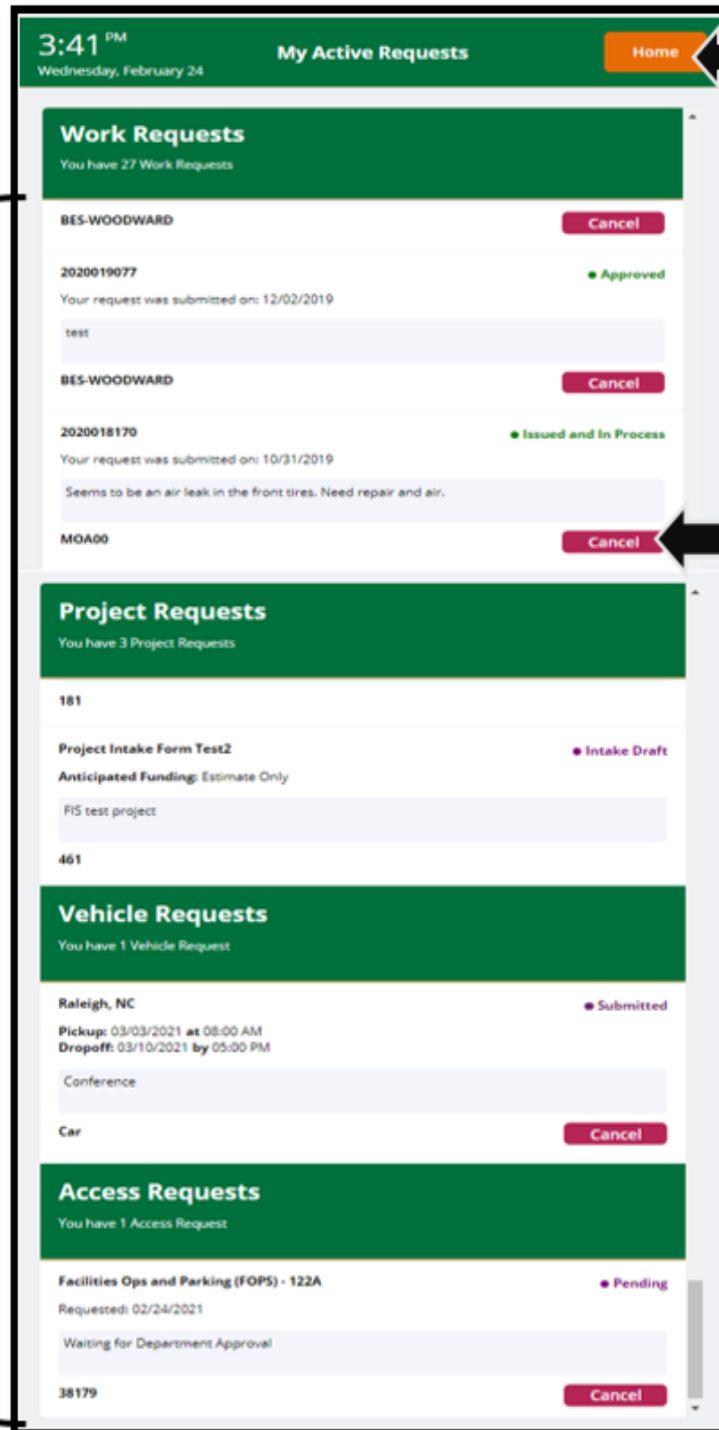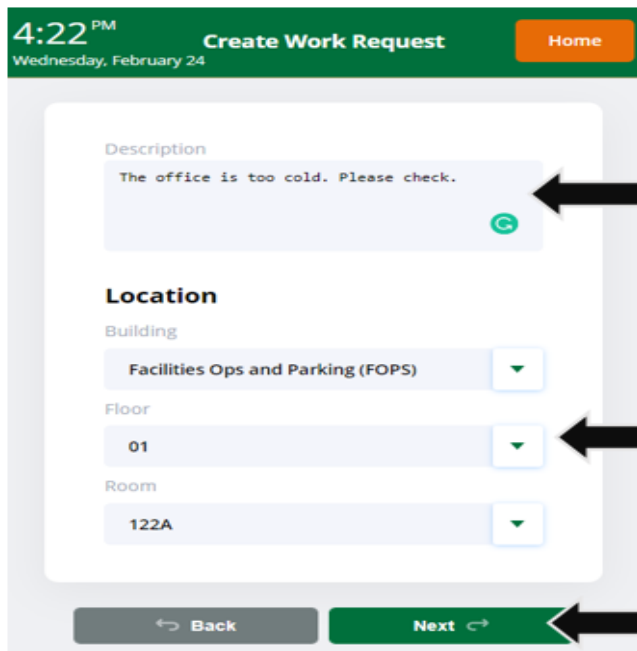

Home: The home button takes you back to the main home screen FM311 portal: https://fm311.uncc.edu/workplace

Cancel: The cancel option will display only for requests when a *request to cancel* can be submitted.

My Active Requests:
All previously submitted requests will be organized by the request type.

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5. Submit a Work Request from FM 311 Workplace:

To enter a request from the Workplace portal, select the Work Request option.

On the *Create Work Request* view, enter the brief description of the issue and then location information. Select the **Next** button to advance to the next screen.
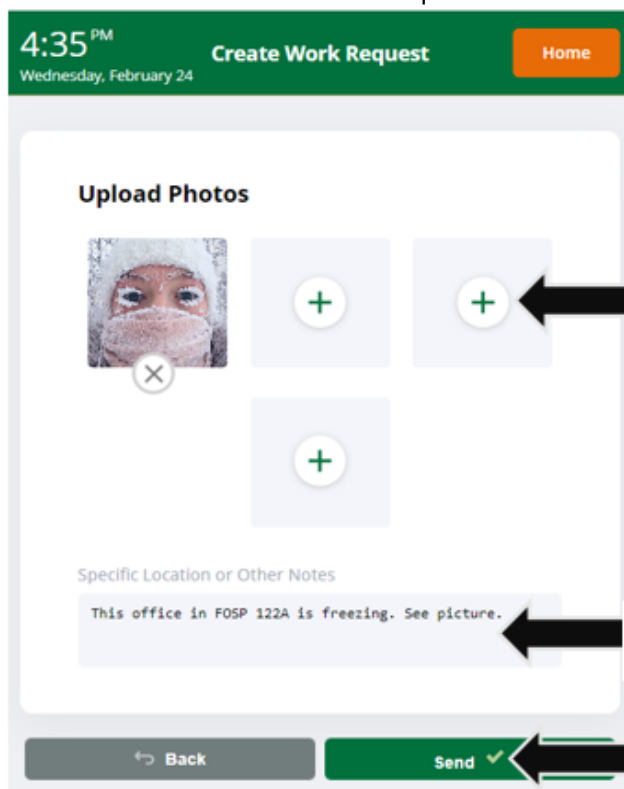

After selecting **Next**, you will have the option to upload a photo and add additional location information and comments. Select **Send** to submit the request forward or **Back** to go back to the previous screen.

Upon selecting **Send**, you will receive a notice that the request has been created.
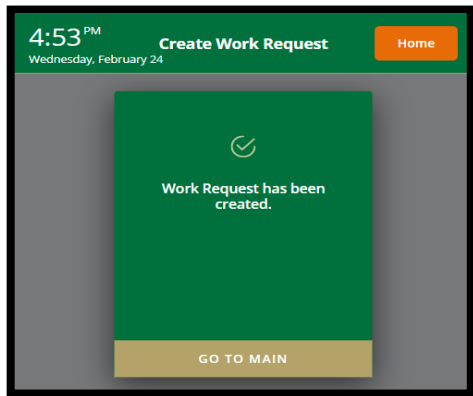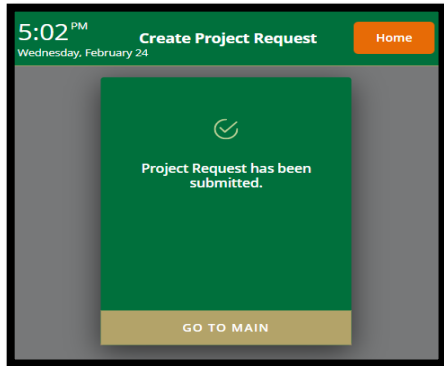
6. Submit a Project Request from FM 311 Workplace:

When adding a project request from the Workplace portal, only the basic information will be entered. You will be contacted later for additional information by Facilities Management project intake.

On the *Create Project Request* screen, you will enter the project name and description. Select next to advance the next screen to enter the Sponsor name, the Customer POC, Building and budget information. After adding the information, select Send to submit the Project Request to project intake.
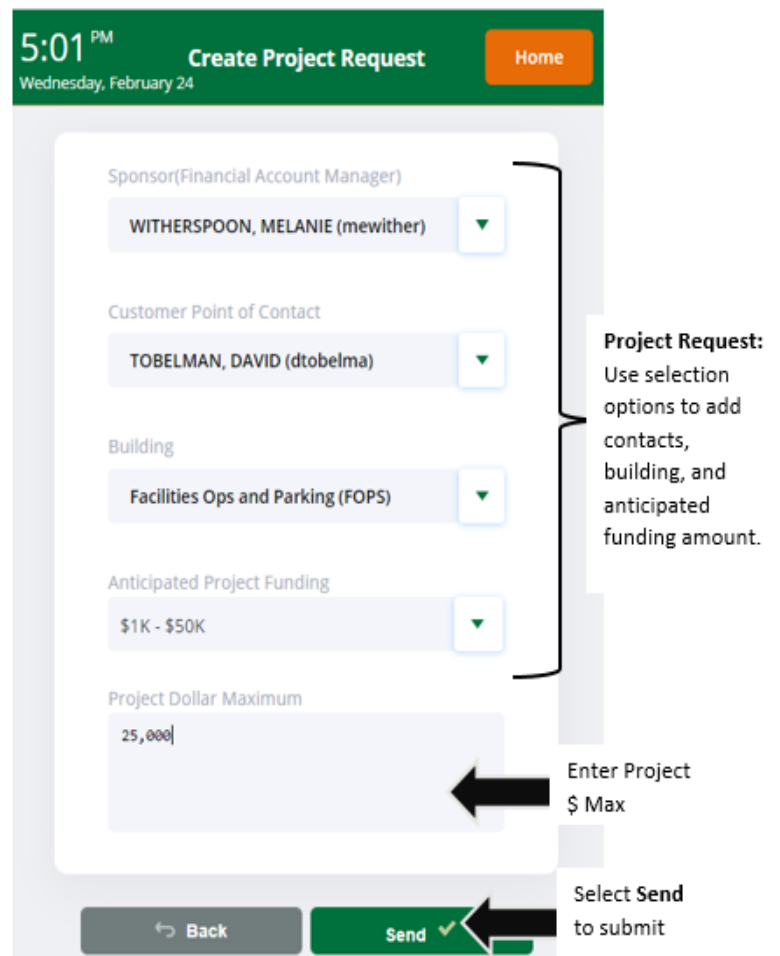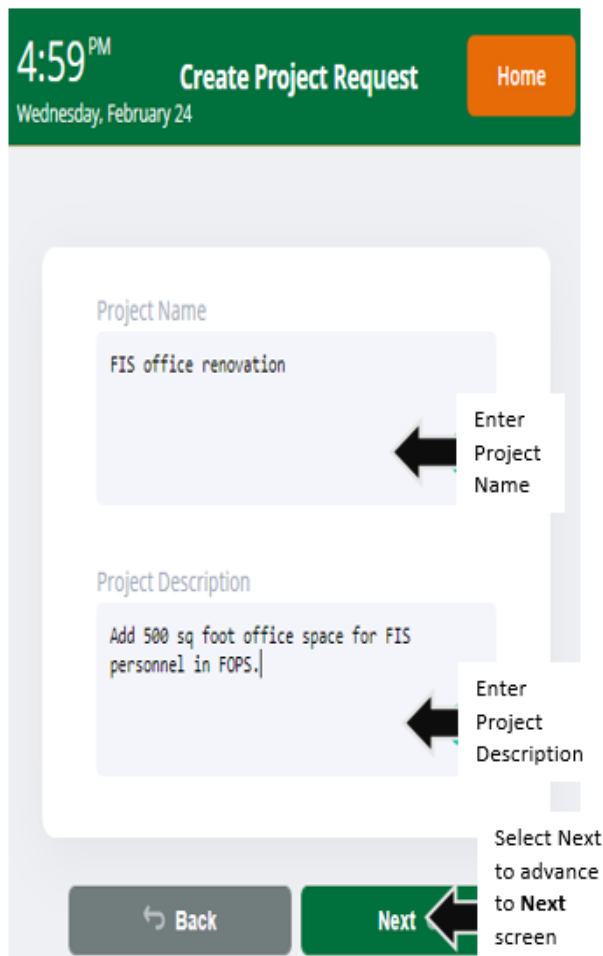
Once Submitted, a notice will display informing you that the Project Request was submitted.

7. Submit an Access Request (Card/Key) from FM 311 Workplace:

To submit an access request from the FM 311 Workplace, select Access Requests from the Home screen view. On the *Create Access Request* view, select the **Next** button to enter a Room Access. The next screen will display allowing selection of the Requested For (if other than person entering the request), and a Comments section. Once these fields are completed, select **Next** to advance to the next screen.

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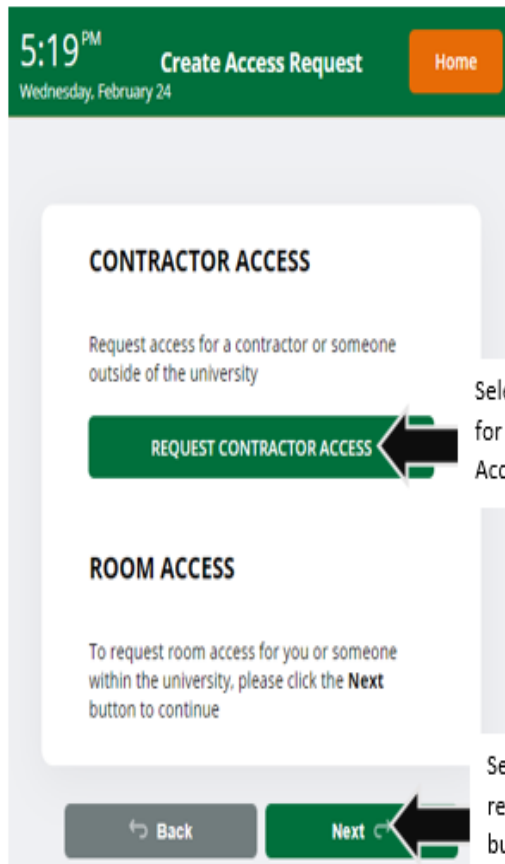
On the **Next** screen, select the Building, Floor and associated Room for the access request. Select **Next**. Review the policy statement and then select **Send** to submit the Access Request.
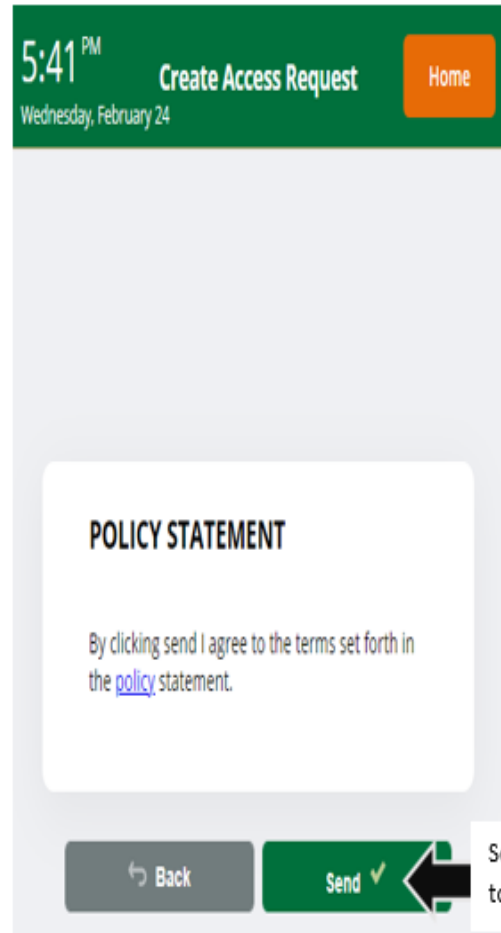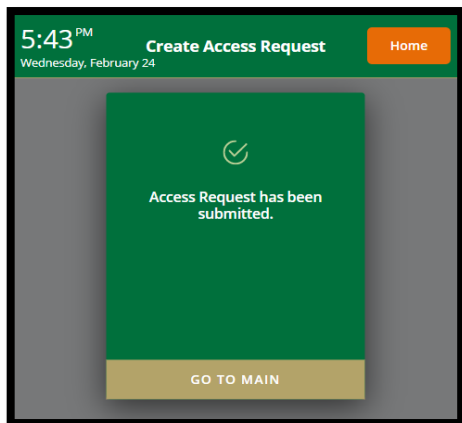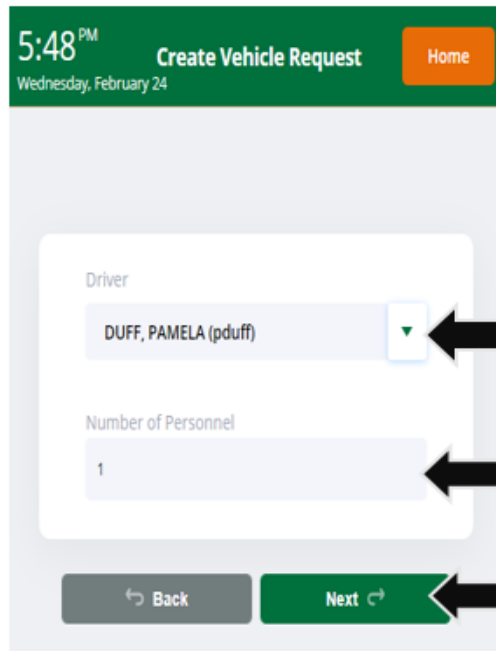

After submitting the Access Request, a notice will display informing that the Access Request was submitted.
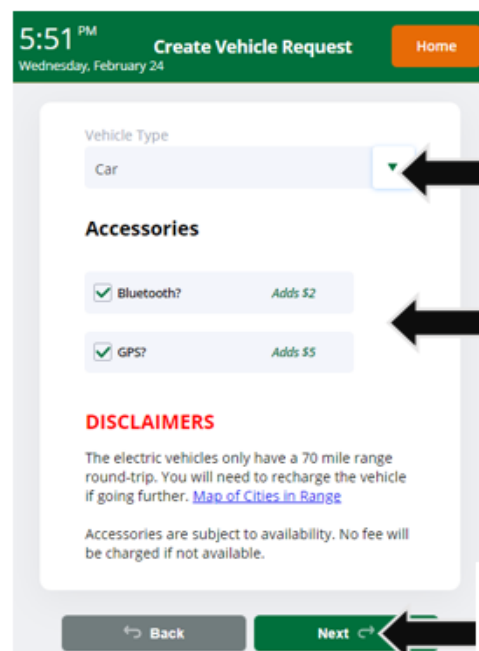
8. Submit a Vehicle Request from FM 311 Workplace:

To submit a vehicle (motor fleet) request, select the Vehicle Request option on the FM 311 Workplace Home screen. On the **Create Vehicle Request** view, select Driver name (if other than person entering the request), add the number of personnel and select **Next**.
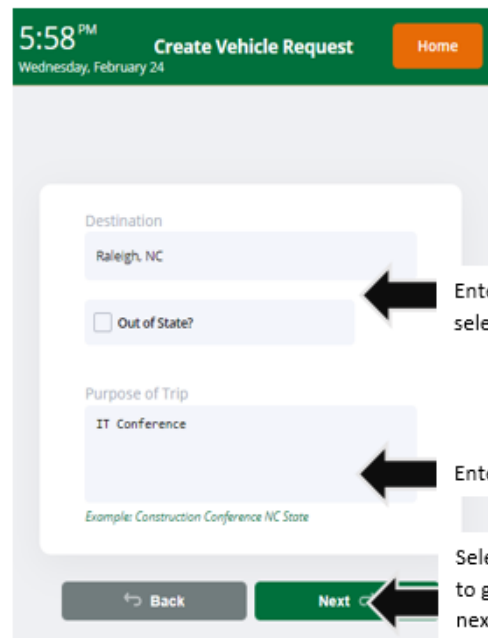

Create Vehicle Request: Select to enter driver name (if other than listed)

Enter Number of personnel.

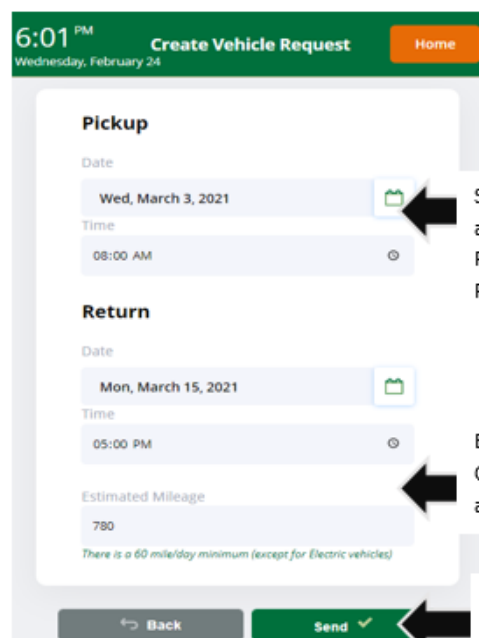Select **Next** to go to the next screen

Select vehicle type

Select any requested accessories

Select **Next** to go to the next screen

On the following screen, enter the vehicle type, accessories and select **Next**. On the next screen you will need to enter the destination and purpose of trip and select **Next** to advance to the final screen.

On the final screen, select the pickup and return dates and times and update any estimated mileage.

Once you have entered all details, select **Send** to submit the Motor Fleet request.

Enter destination and select if out of state

Enter Purpose of Trip
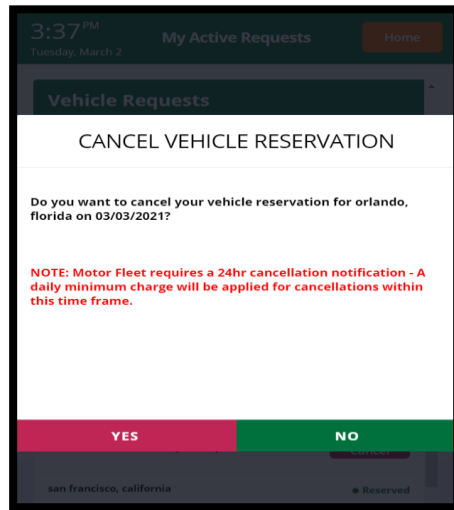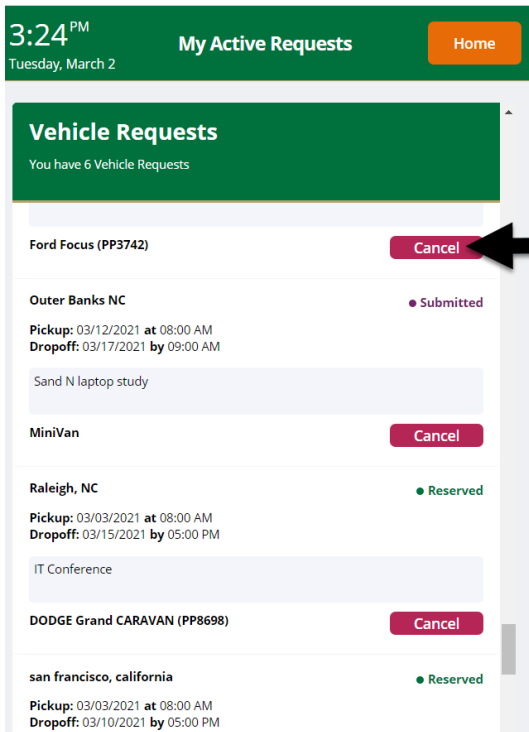
Select **Next** to go to the next screen

Select the Date and Time for Pickup and for the Return.

Edit Est./ Calculated Miles as needed.

Select **Send** to submit

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After the **Send** button is selected, a notice will display that the Motor Fleet request has been submitted.
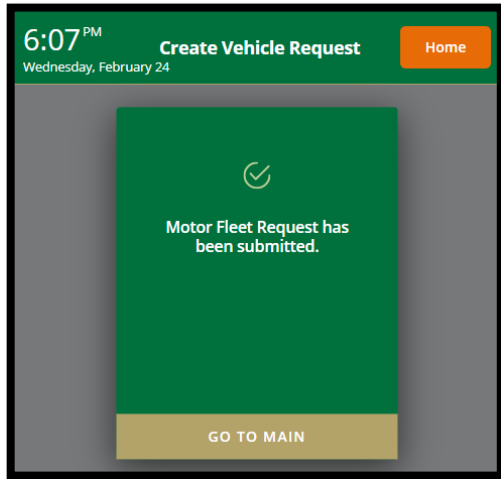
Note: Individuals listed as the *Driver* on a request will be able to view the request from within FM 311 Workplace Portal and also submit a request to *Cancel* the vehicle request.

A *Cancel Vehicle Reservation* popup will display to confirm. If the vehicle is being canceled less than 24 hours prior to pick up a daily minimum charge will apply.

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9. Submit a Cancellation Request from FM 311 Workplace: (For work requests)
When requesting a cancellation from the FM 311 Customer view, enter a reason for the cancellation request and then select **YES**.

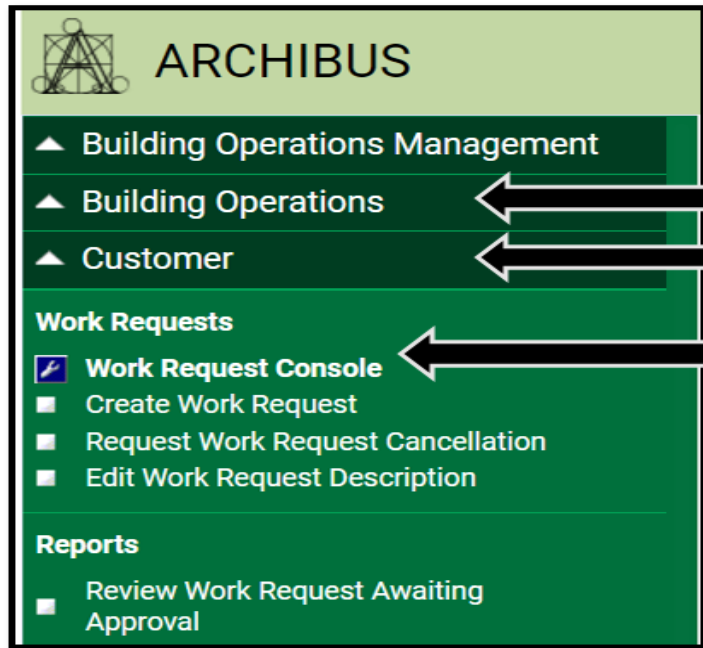Any cancellation request submissions will be sent to the shop for review.

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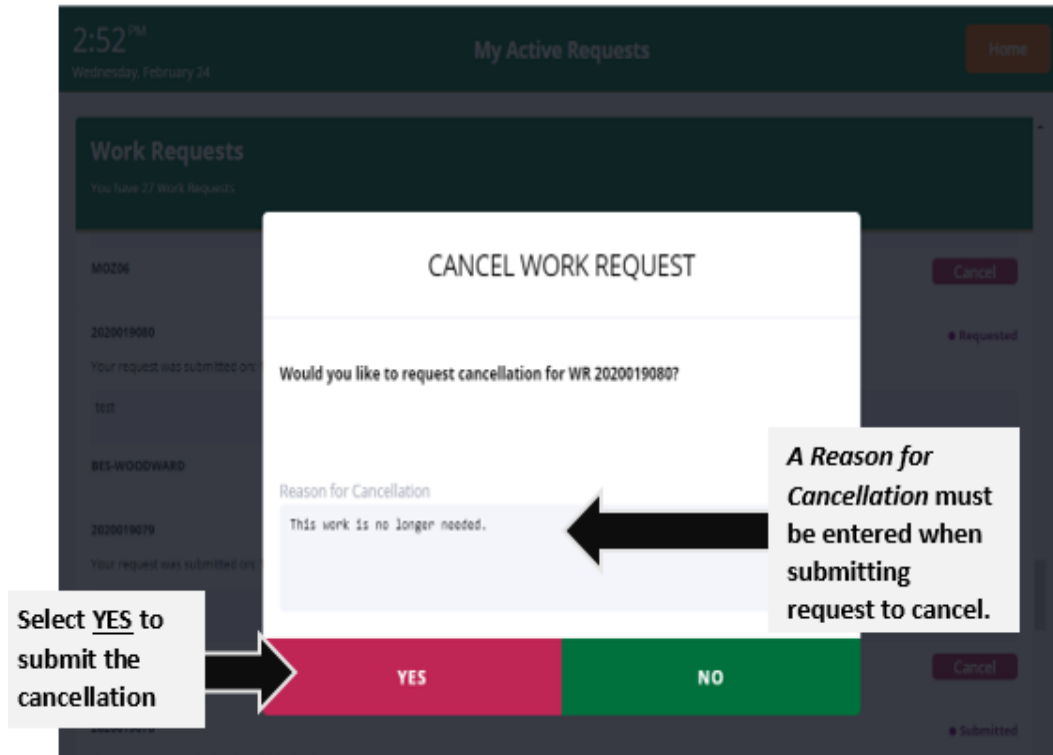
Section 2: Customer Work Request Console View Updates

Changes to *Request Work* view (Full Desktop View: https://archibus.uncc.edu/):

1. **Work Request Console (Building Operations -> Customer or Building Operations ->Building Liaison)**

When customers create a request for service or maintenance issue from the Work Request Console->Request Work view, they will notice a scaled down form view requiring less information to submit the work request.

Accessing Work Request Console: To access the work request console, customers will select the Building Operations Management module, Building Operations, and then Customer role (or Building Liaison role).


After the user role displays, select *Work Request Console*. This view will display all work requests submitted by the customer organized by current status. Selecting a status will display all requests associated.

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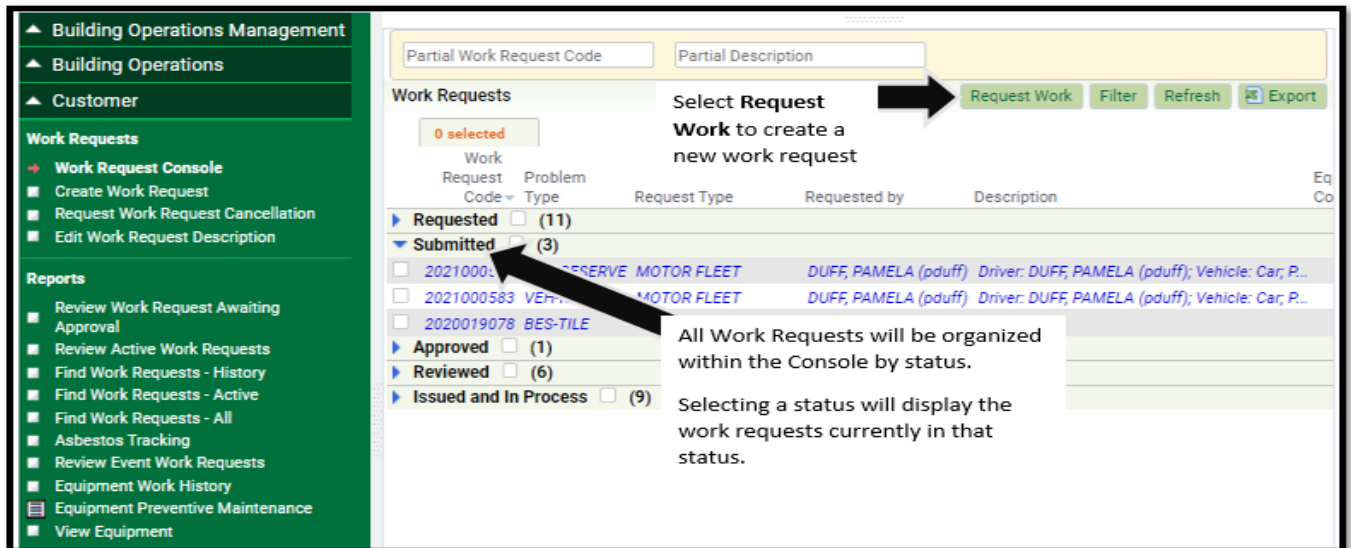
2. *Request Work* **form:**

To enter a new work Request, select *Request Work* action button located at the top of the page.
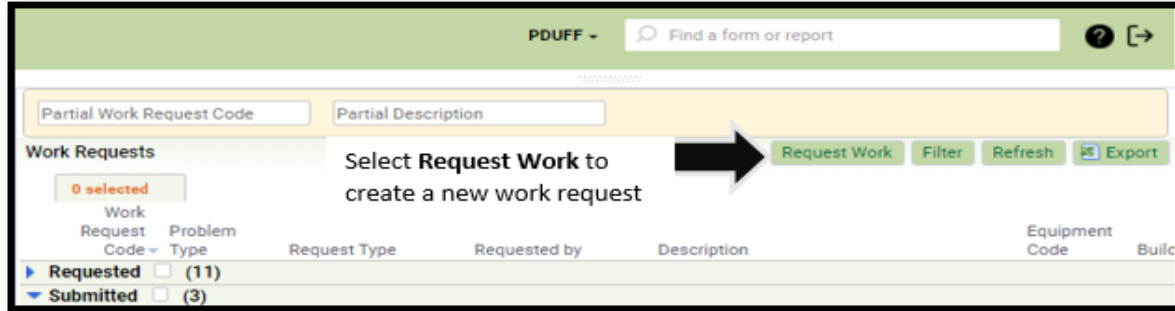
The Request Work form will display. The form has four required fields:
1. *Dept Code:* 4-digit department
2. *Sub-Dept Code:* 5-digit organization unit
3. *Work Description:* text field describing the details of the problem
4. *Building Code:* 4-digit building code associated with the bldg. name

Form Fields: Complete and update the form by using the blue ellipse buttons for validated fields.
Fields where text may be directly typed in are Work Description, Problem Locations, and Event Name (if request is for an event support or set up).

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Changing Bldg. Floor and Room: To change the bldg. code, floor code and room code, click *Select Drawing* located within the Location section of the *Request Work* form view.
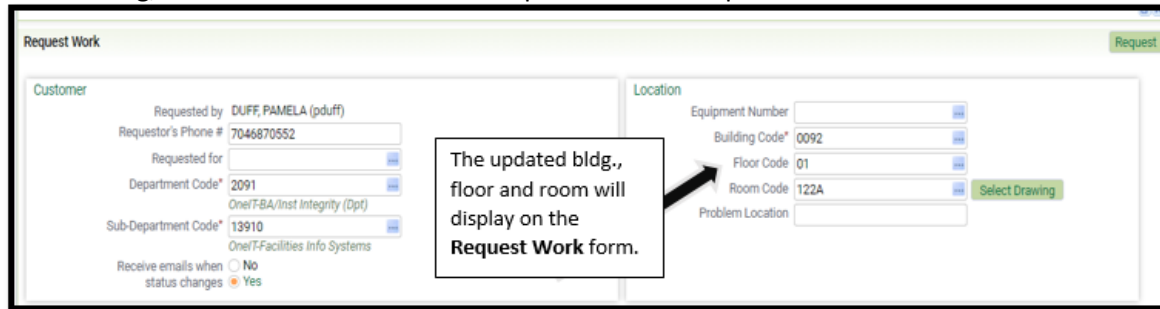
When the Select Room view displays, type in the bldg. name or code to filter the buildings. Select the floor of the building needed to display the drawing
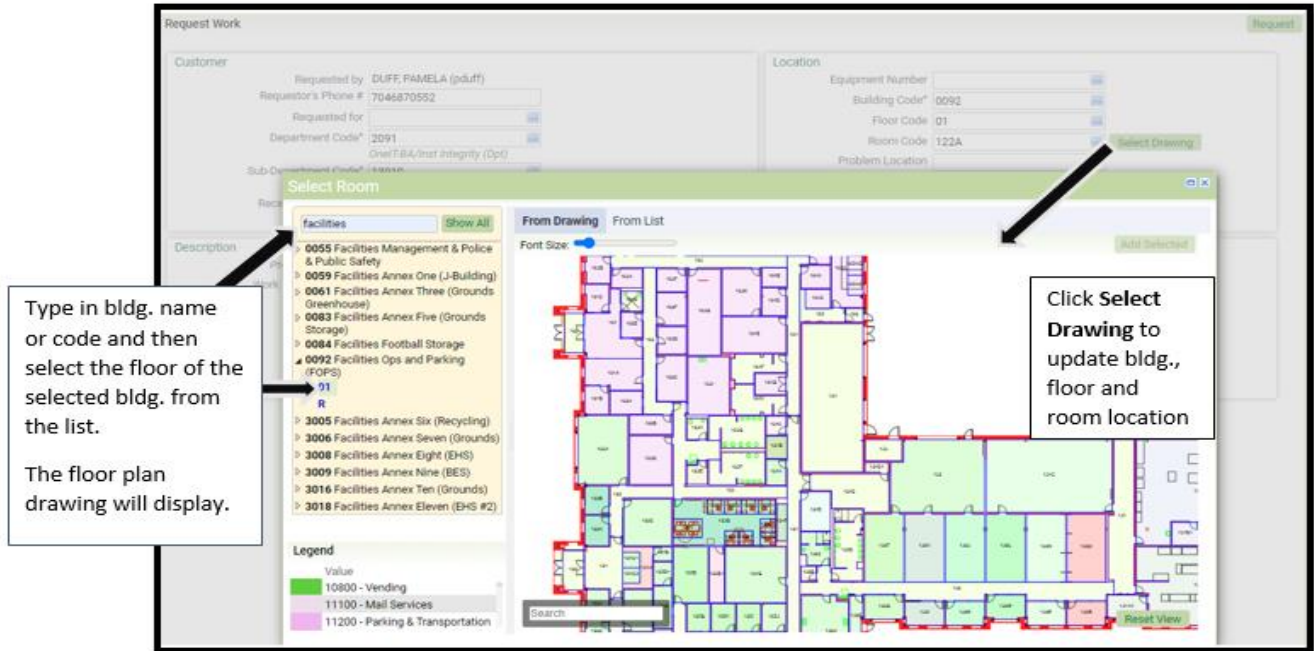
Adding selected bldg. floor, room to the form: Click to highlight the room needed from the floor plan view. Select the *Add Selected* action button to add the highlighted room to the *Request Work* form.
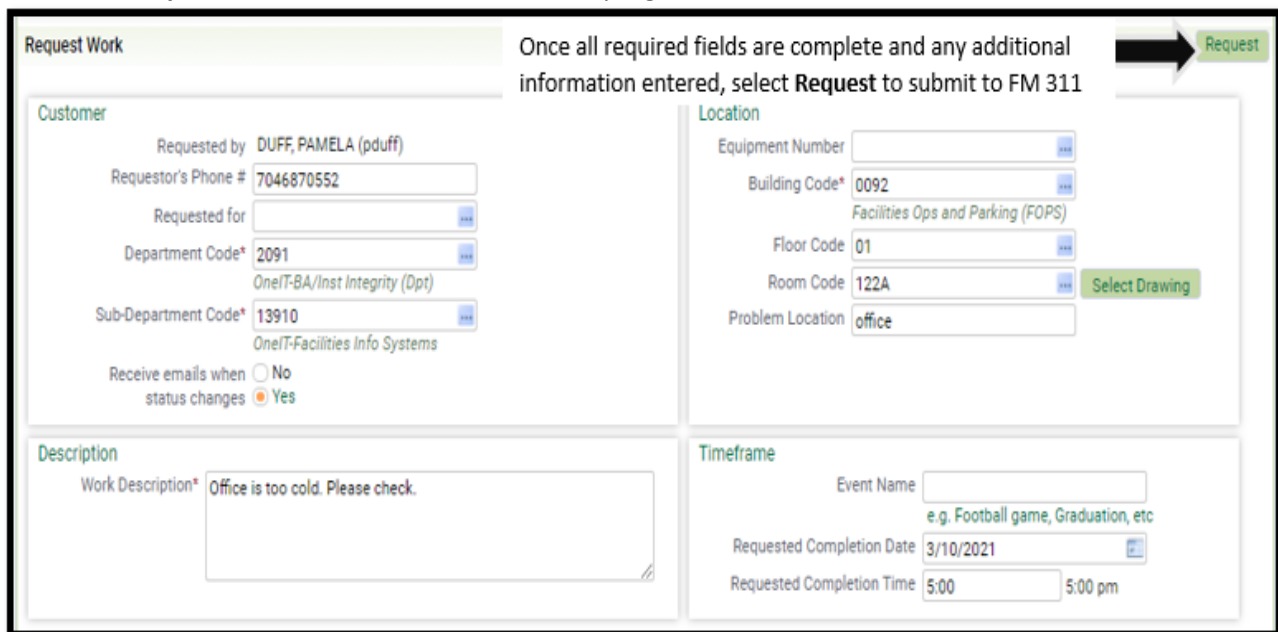
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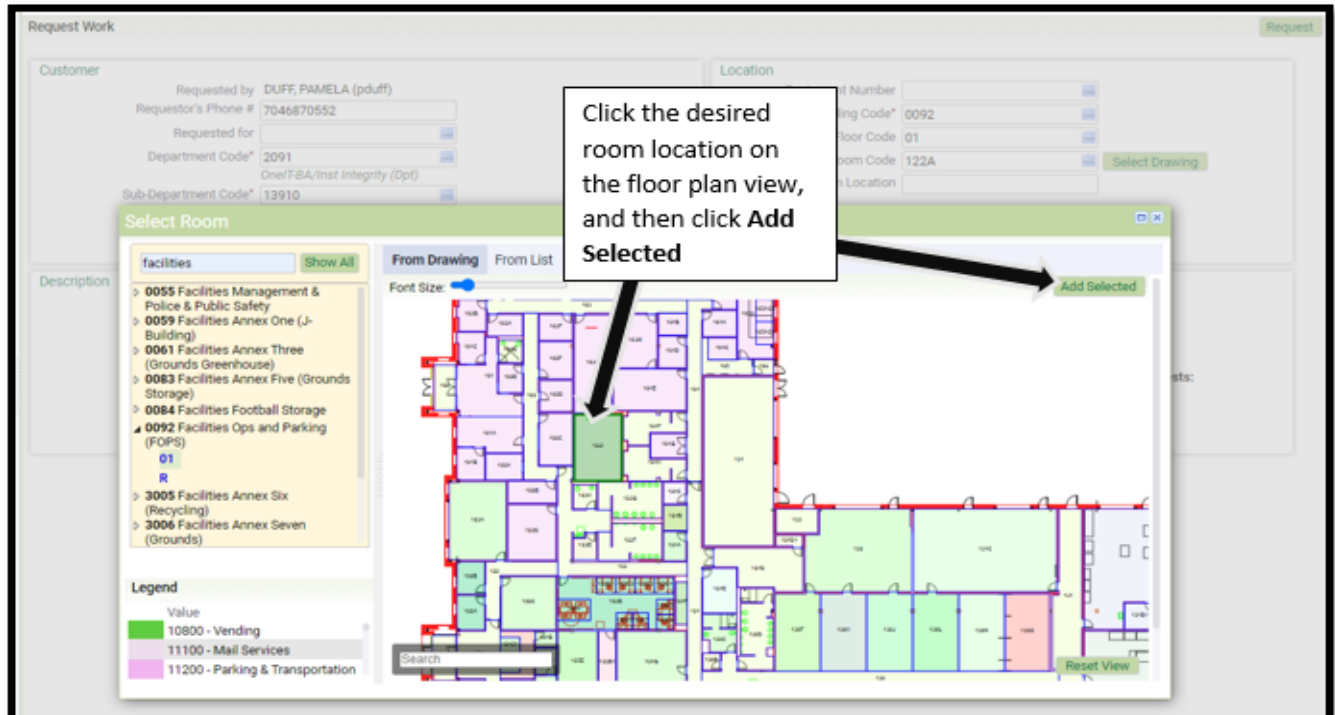
The building, floor and room selected will update on the Request Work Form.

*Submitting **Request Work** Form:* Once the form fields have been completed (especially any required fields), select the **Request** action button located at the top right corner of the screen.

Your work request will be sent to the ARCHIBUS FM 311 queue, who will route the request accordingly to the correct Facilities Management area or shop, or to the department for approval, if deemed to be reimbursable work.

If FM 311 personnel have any questions or need clarification about the work requested, they will contact you directly.

FM 311 contact information for any questions:
Email- fm311-group@uncc.edu
Phone- 704-687-1311