

Create Work Request

Customer Documentation for ARCHIBUS *Request Work* Process:

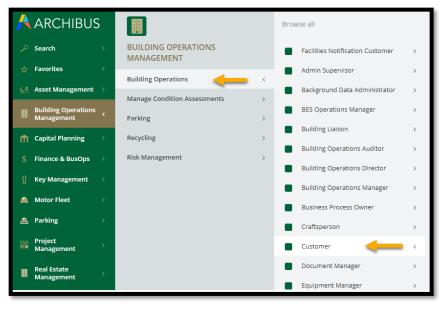
1. ARCHIBUS Sign in Page

Log into ARCHIBUS (https://archibus.uncc.edu/archibus) using your NinerNet credentials.



2. Process Navigation: Building Operations Management

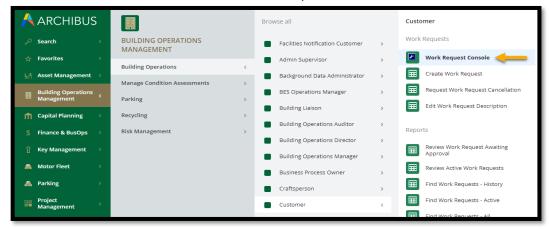
From the process navigation left panel view, select Building Operations Management module from the slide out menu; then, select Building Operations activity and then <u>Customer</u> role from the list of menu items.



Select <u>Building Operations</u> <u>Management</u> module, then <u>Building Operations</u> Activity from the slide out menu. The list of assigned roles will display. Select the

Customer role.

From the *Customer* role list, select the Work Request Console task.





3. Work Request Console – Request Work Form

The Work Request Console view will display. Select <u>Request Work</u> action located in the upper right corner of the window.

🤌 Work Requ	est Console		UNC CHARLOTT	e 🕐	*	
Partial Work Request Code	Partial Description					
Work Requests		Select Request Work to display the Work Request form	Vork Filter	Refresh	X	Export

The *Request Work* Form displays. Note that the Work Request form is divided into four sections for easier viewing: Customer; Location; Description and Timeframe.

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

A	ARCHIBUS	🥙 Work Request Console	
	Search	>	π × ×
	Favorites	> Request Work	Request
⊾ň	Asset Management		
	Building Operations Management	Customer Location Requested by DUFF, PAMELA (pduff) Equipment	t Number
Ĥ	Capital Planning	> Requestor's Phone # 7046870552 Build	ing Code* 0092
	Finance & BusOps	Requested for	Facilities Ops and Parking (FOPS) oor Code 01
	Key Management	> Department Code* 2091 OneIT-BA/Inst Integrity (Dpt) Rd	om Code 122A Select Drawing
	Motor Fleet	> Sub-Department Code* 13910 Problem	Location
۸	Parking	Receive emails when O No Employee user account	
	Project Management	status changes • Yes prepopulate the Reque	st Work form
	Real Estate Management	> Description Timefram	
	Solution Templates	Work Description*	Event Name e.g. Football game, Graduation, etc
El	Space Management	Reque	sted Completion Date 8/6/2021
	Training		ted Completion Time 5:00 pm
0	UNCC Custom Modules	>>	



4. Required Form Data

Before you submit the Request Work form, it is very important that you fill out as many fields as possible in order for FM 311 to efficiently route the work accordingly and the FM shop to complete your request.

All fields indicated with a red asterisk (*) are required. In addition to the prepopulated required fields, these required fields include *Work Description* and *Building Code* (if not correctly populated with the needed building information for the specific request).



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

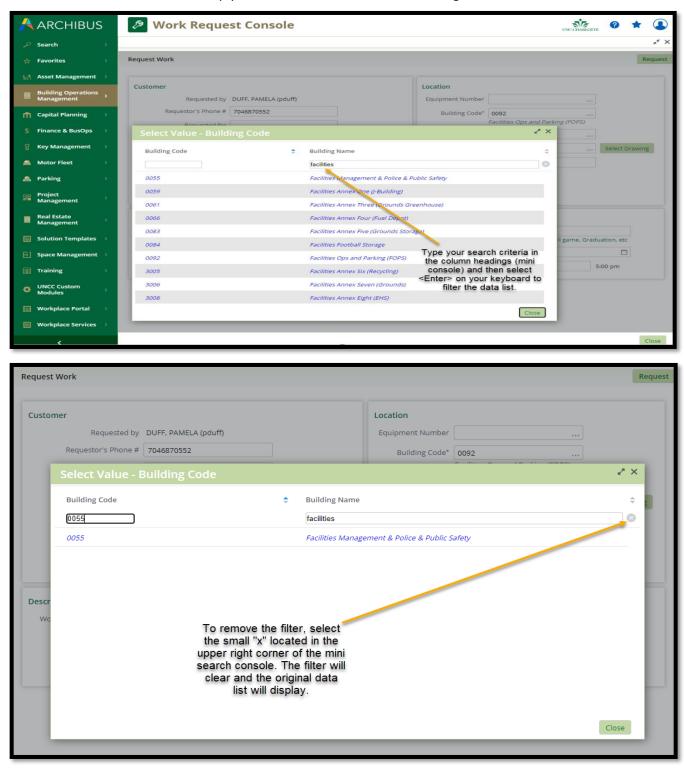
You may use the ellipse button (also called a *Look-up button*) located to the right of each field to filter for information. After selecting an ellipse button (...), a data list of information displays.

Customer					L	.ocatio	n				
Requested by DUFF, PAMELA (pduff)				Equipn	nent Number						
Requestor	s Phone #	7046870552					uilding Code*				
Req	uested for			Se	electing the	ellips	sis button (Facilities Wi	Pps and Parking (FO)	PS)	
Departm	ent Code*	2091		dis	play a pop	up da	ataidist for	filtering	g.		
Sub-Departr		Value - Requeste stor's Phone #						ent C	ode, 🎤	× ••• •	Select Drawing
Receive e stat	Employ	ee Name 🗘	Departm Code	ent \$	Sub- Department Code	\$	Employee Telephone	¢	Building Code 🌲		
	smith										
Description	SMITH,	MATTHEW (msmit566)	1050		10500						
Work Descriptior	SMITH,	JAMES (jsmit811)	1050		10601					raduat	ion, etc
	SMITH,	SEAN (ssmit516)	1050		10800						Ċ
	SMITH,	TA-MIA (tsmit357)	1070		11200		7043632526			5:00) pm
	SMITH,	LEROY (lsmit287)	1070		11200						
	SMITH,	SAKAVASIA (ssmit514)	1180		13300						
									Close		



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 Request Work 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.

Customer		Click the			
Requested by	DUFF, PAMELA (pduff)	selection from the list to			
Requestor's Phone #	7046870552	populate the field			
Requested for	smith, g				
Department Code*	SMITH, G.DAVID (gsmith93) 1250 - 14105				
	SMITH, GAVIN (gsmit134) 2910 - 31400				
Sub Department Code*	SMITH, GENA (gsmit121) 2420 - 27700				
Sub-Department Code*	SMITH, GINA (gcsmith) 2091 - 12600				
Receive emails when status changes	 No Yes 	5			

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

Requested by	DUFF, PAMELA (pduff)	
Requestor's Phone #	7046878975	
Requested for	SMITH, G.DAVID (gsmith93)	

6. Completing the Request Work Form

Populate and complete each field as needed until you have entered data into allthe 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 FM 311 will understand the problem and route the work accordingly to the correct Facilities Shop to complete your work request.

Work Description*	Our lights are not working properly in the back, right corner of	
	the room. We have had the light bulbs replaced recently in the	
	fixtures; however, that action did not resolve the issue. Please be	9
	aware that there will be a large meeting in this room on Monday,	4

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.). Information you enter will determine the priority assignment to be entered by FM 311 team.



c. Timeframe: The timeframe section allows entry of work such as Events to be scheduled. If your request is an event type request that requires specified date and time to be completed, complete this section. Otherwise, you may leave the *Event Name* field blank.

Timeframe		
Event Name		
	e.g. Football game, Gra	aduation, etc
Requested Completion Date	8/6/2021	
Requested Completion Time	5:00	5:00 pm

d. Requested Completion Date: You may update the *Requested Completion Date* and *Time*, if the work must be completed by a specified date (example: furniture move or event setup).

Note: The *Requested Completion Date* field will automatically default to **No Urgency**: 4 weeks. This timeframe will be adjusted by FM 311 if the issue is determined to be higher urgency.

e. Email Notification Option: If you do not wish to receive automated email notifications when the work request status changes, select the "No" option for "The "Receive emails when status changes.

Customer	
Requested by	DUFF, PAMELA (pduff)
Requestor's Phone #	7046878975
Requested for	SMITH, G.DAVID (gsmith93)
Department Code*	1250
	Maintenance and Operations (Dpt)
Sub-Department Code*	14105
	FM HVAC Shop
Receive emails when	○ No
status changes	• Yes

7. Submitting the Request Work Form

After you have filled out the form, remember to <u>Review the Entire Work Request</u> to verify everything was entered correctly.



Once you have completed and reviewed the form, click on the **<u>Request</u>** button located at the top in the right corner of the request work form. The request will be sent to FM 311 team for review.

quest Work			Selecting the Requ submit the work rec 311 team to be r routed to the corr	uest to the eviewed an	e FM		F	۲eq
Customer			Location					
Requ	lested by	DUFF, PAMELA (pduff)	Equipment Num	ber				
Requestor's	Phone #	7046878975	Building Co	de* 0055				
Requ	ested for	SMITH, G.DAVID (gsmith93)		Facilities N	1anagement & Police & Pu			
Departme		1250	Floor Co	de 01				
Departitie	in code	Maintenance and Operations (Dpt)	Room Co	de 123B		Select	Drawin	g
Sub-Departme	ent Code*	14105 FM HVAC Shop	Problem Locat	ion FIS team	office			
Receive ema status	ails when changes	No • Yes						
escription			Timeframe					
		ts are not working properly in the back, right corner		Event Name				
Work Description*		n. We have had the light bulbs replaced recently in the however, that action did not resolve the issue. Please			e.g. Football game, Grade	uation, et	c .	
Work Description*				mpletion Date	8/6/2021	Ċ.	1	
Work Description*	aware th	hat there will be a large meeting in this room on Mor	Kequested Co	impiction bute	0/0/2021			

8. The Request Work Form 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.

WR Status Diagram	Status diagram				
Requi 1 day(ested Reviewed	Issued	Completed	Ready to Bill	
Work Request 2022001310 🥣	Work Request code for reference	Work Request C	overview page provide	Update Description s option to Request	Print
Customer		a Cancellatio	on, Update the Descrip	ption, and Print.	Option to Print
Requested by	DUFF, PAMELA (pduff)		Equipment Number		
Requestor's Phone #	7046878975		Building Code	0092	
Requested for	SMITH, G.DAVID (gsmith93)			Facilities Ops and Parking (FOPS)	
Department Code	1250		Floor Code		
	Maintenance and Operations (Dpt)		Room Code		Select Drawing
	14105	View FAMs	Problem Location	FIS team office	
	FM HVAC Shop		Routing		
Index/Fund Code				Contact Info	
Banner Account Code				contact mo	
Description					
	Work Request Code	2022001310			
	Is this WR reimbursable?	No 🖌			
	Problem Type				
	Work Description*	Our lights are not working proper the room. We have had the light b fixtures; however, that action did	oulbs replaced recently in the		
					Close

You are welcome to print out the *Review* page for reference by selecting the print workorder icon located in the upper right corner of the screen.