



UNC CHARLOTTE

FM Housekeeping Supervisor Training August 2010





Agenda

- ❑ Introduction/Overview
- ❑ Part 1: Create WR
- ❑ Log In Process/Test Server
- ❑ Part 2: Housekeeping Supervisor Functionality/Review
 - ❑ Review Non-Reimbursable WR
 - ❑ Assign Craftsperson
 - ❑ Assign Actual HRs
 - ❑ Complete WR
- ❑ Training Part 3: Housekeeping Supervisor—Archibus Functionality
 - ❑ Processing Reimbursable Project WRs & PM
 - ❑ Assigning CFs
 - ❑ Issuing Approved WRs
 - ❑ Printing WRs
 - ❑ Locating WRs-Active, Historic or All



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Introduction/Overview

- Training Objective: To review Archibus functionality and processes through discussion and hands-on training; provide Housekeeping Supervisors an overview of the knowledge and skills needed to perform duties and daily responsibilities in relation to their role within Archibus Web Central.
- Training Standard Operating Procedures and Documentation are available electronically on the FM Web Archibus/SOP webpage at:

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



- Test Server Link Located on FM Web at <http://facilities.uncc.edu/Archibus/sops.asp>

A screenshot of a web-based sign-in form. The form has a green background and contains the following elements: a title "Sign In", a subtitle "Sign in to your personalized list of activities and join the collaboration now.", two input fields labeled "Enter your user name:" and "Enter your password:", a "Sign In" button, and a checkbox labeled "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:
[Input Field]

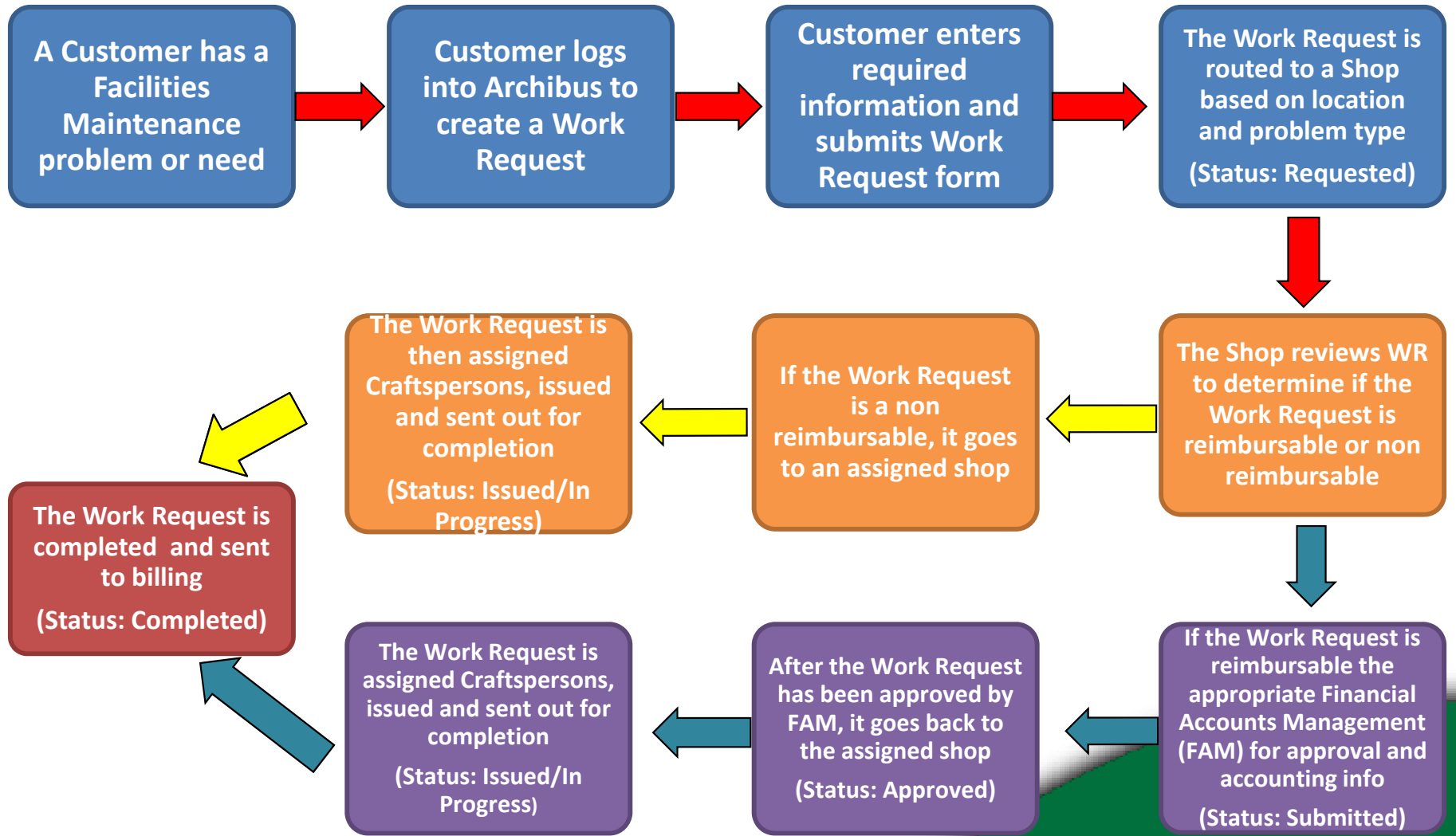
Enter your password:
[Input Field]

Remember my user name on this computer

- Sign In using NinerNet username and password



Work Flow of a Work Request





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Part 1: Creating Work Requests

- WR Form Functionality
- Selecting a Room from the Drawing
- Emergency WR
- Email Alert option
- Upload Customer Document

Select Room from Drawing option

Create Work Request View

UNC CHARLOTTE

- Building Operations Management
- Building Operations
- Supervisor / PA

Tasks:

Work Requests

- Create Work Request
- Update/Complete WR Estimates
- Supervisor WR Dashboard
- Review & Issue Work Requests
- Issue Approved Work Requests
- Edit Work Request
- Edit Work Request Description
- Update Submitted Work Request
- Print Work Request
- Update/Complete locked WR Estimates

Basic Information | Documents | Overview

Requestor

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

Requested for:

Work Location

Same as requested for

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

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

Room Code: 230 Problem Location:

Equipment

Equipment Code:

Description

Problem Type:

Work Description:

Priority

Urgency: Emergency Critical Routine No Urgency

Requested Completion Date: 10/23/2009 Requested Completion Time: 9:26
10/23/2009 09:26.44.000

Event Name:

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

Cancel | Next | Submit

Form divided into sections

Emergency WR option

Receive email when WR status changes option



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 a Work Request. The form is divided into several sections: Requestor, Work Location, Equipment, Description, and Urgency. A red arrow points from the 'Submit' button in the top right corner to a 'Confirm' dialog box.

Section	Field	Value
Requestor	Requested by:	DUFF, PAMELA (pduff)
	Contact Phone #:	7046874009
Work Location	Requested for:	[Dropdown]
	Division Code:	1240 Facilities Management (Dpt)
	Department Code:	13900 Facilities Management AVC
	Building Code:	0055 Facilities Management & Police & Pu...
	Floor Code:	02
Equipment	Room Code:	230 [Select Drawing]
	Problem Location:	test
Description	Equipment Code:	[Dropdown]
	Problem Type:	OTHER
Urgency	Work Description:	test
	Urgency:	Emergency (Selected)
Requested Completion Time:		1:37

Confirm

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.

Yes No



Basic Information | **Documents** | Overview

Attach Documents and Submit Your Request Cancel | Submit

Work Request Code: 2010010348	Requested by: DUFF, PAMELA (pduff)
Requested for:	Contact Phone #: 7046874009
Problem Type: GND-SPECIALEVENT	Work Request Priority: Critical
Work Description: Fair on campus; will need grounds assistance in setting up tents and tables.	
Customer Documentation: <input type="text"/>	

Check In New Document

Document File: Browse...

The system will store this file under the names: wr-2010010348-doc1.txt

Description:

Set Lock Status:
 Locked Unlocked

OK Cancel

1. Select the green arrow button to open the Check in Document window.
2. Next, select the Browse button to open the File Upload window.
3. After selecting your document and "Open" button, the document will upload to the Attach Documents screen.
4. Select Submit to advance to the Overview page.

File Upload

Look in: My Documents

- My Recent Documents
- Desktop
- My Documents
- My Computer
- My Network Places

- My Music
- My Pictures
- My Received Files
- My Shapes
- My Videos
- OneNote Notebooks
- Outlook
- WinProfile
- cf
- My Sharing Folders
- test_doc
- WLin installer

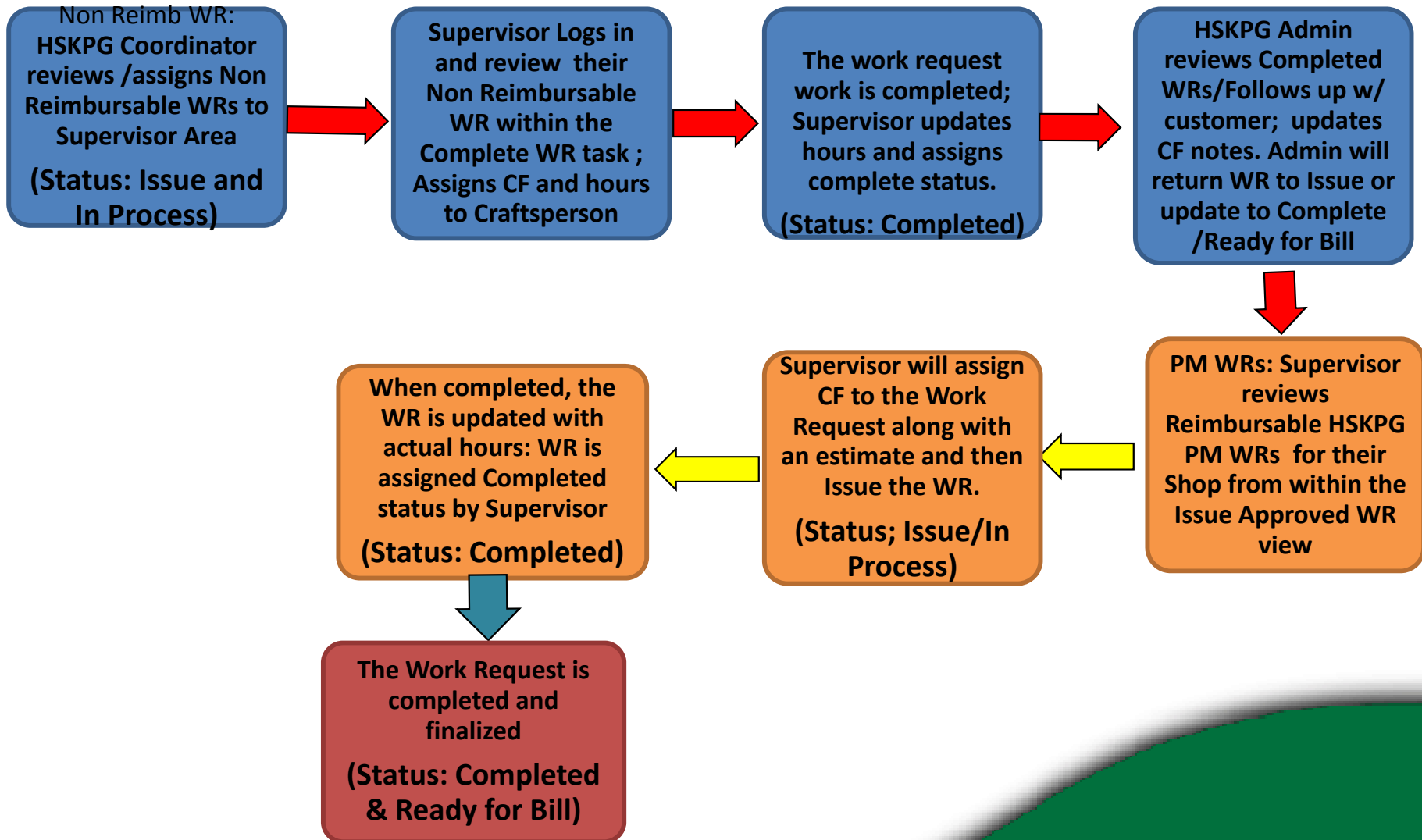
File name:

Files of type: All Files

Open Cancel



Housekeeping Work Flow





Housekeeping Supervisor Role

- HSKPG Non-Reimbursable WR Routed to Housekeeping Shop Supervisor
 - Note: Non-Reimbursable WR is Assigned to Supervisor In Issue/In Process Status
- HSKPG Supervisor Reviews WR Using Complete WR task
- HSKPG Supervisor Re-Routes WR If Needed
- HSKPG Supervisor Assigns Housekeeping Craftsperson(s) to WR
- HSKPG Supervisor Assigns Actual Hours to WR and Assigns Completed Status



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Part 2: Housekeeping Supervisor/PA Role Processes

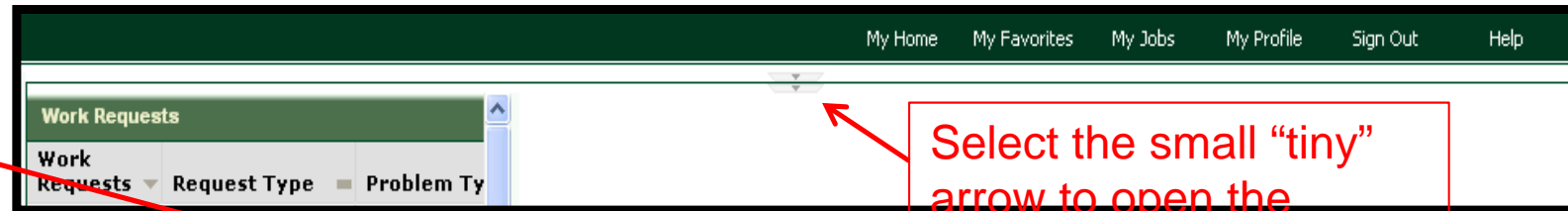
- Using the Collapsible WR console
- Review Non-Reimb WR Assigned
- Complete WR
- Assign Housekeeping Shop CF to WR
- Update Actual Hours
- Mark WR Completed



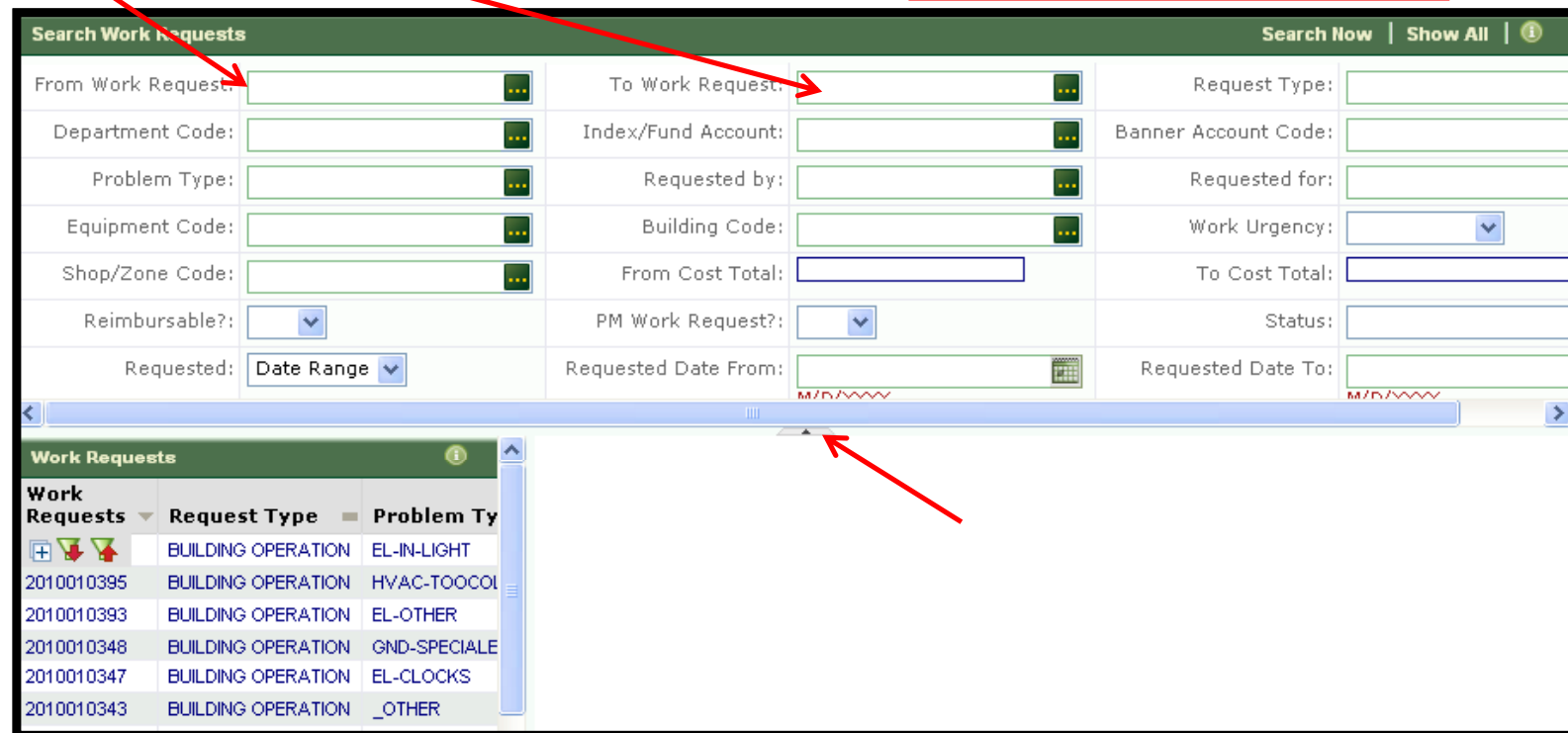
Using the WR Search Console

Enter the work request number into the "From" and "To" fields and then select Search now to locate your work request.

Throughout most tasks, the Main Search console may be opened or closed by selecting the (tiny) grey arrow located at the very top, middle or left side of the main windowpane.



Select the small "tiny" arrow to open the search console.



Supervisor Review & Assigns Non-Reimbursable WR

UNC CHARLOTTE

- Building Operations Management
- Building Operations
- Supervisor / PA

Tasks:

Work Requests

- Create Work Request
- Update/Complete WR Estimates
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- Edit Work Request
- Edit Work Request Description
- Update Submitted Work Request
- Print Work Request
- Update/Complete locked WR Estimates

Completion

- Find Work Requests - Active
- Find Work Requests - History
- Find Work Requests - All
- Review Event Work Requests
- Complete WR

Web Central

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My Home My Favorites My Jobs My Profile Sign Out

Filter

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

Sub-Department Code: Requested by: Requested for:

Equipment Code: Building Code: Problem Type:

Work Urgency: No Urgency Requested Date From: Requested Date To: Status: Ready for Billing?:

Work Request

	Work Request Code	Request Type	Work Request Status	Ready for Billing?	Requested by	Requested for	Problem Type	Building Code	Floor Code	Room Code	Problem Location	Project Number	Date Work Requested	Date Work Completed
<input type="checkbox"/>	Details 2011005533	HOUSEKEEPING	Issued and In Process	No	PRESLEY, LOIS (lpresley)		HSPK-CARPET	0036	01	142	Conf. Room		8/6/2010	
<input type="checkbox"/>	Details 2011005163	HOUSEKEEPING	Issued and In Process	No	PRESLEY, LOIS (lpresley)		HSPK-RR CLEANING	0036	01	102	Women's Restroom Equipped for Mobility Impaired		8/4/2010	
<input type="checkbox"/>	Details 2011005054	HOUSEKEEPING	Issued and In Process	No	MANGINO, KELLY (kmangino)		HSPK-VACUUM	0032	01	10281	Conf. Room		8/3/2010	
<input type="checkbox"/>	Details 2011004233	HOUSEKEEPING	Issued and In Process	No	MCCAIN, ARZELLA (arzbaker)	KISH, GREGORY (gkish)	HSPK-CARPET	0041			Office		7/28/2010	
<input type="checkbox"/>	Details 2011004226	HOUSEKEEPING	Issued and In Process	No	PHILLIPS, KATHY (kphillip)		HSPK-CARPET	0041	01	101			7/28/2010	
<input type="checkbox"/>	Details 2011004041	HOUSEKEEPING	Issued and In Process	No	HOMESLEY, SHANNON (sthomesl)		HSPK-CARPET	0036	00	016			7/27/2010	
<input type="checkbox"/>	Details 2011003022	HOUSEKEEPING	Issued and In Process	No	PHILLIPS, KATHY (kphillip)	JARRETT, CHRISTOPHER (cjarret5)	HSPK-CARPET	0041					7/20/2010	
<input type="checkbox"/>	Details 2011002174	HOUSEKEEPING	Issued and In Process	No	KISH, GREGORY (gkish)		HSPK-DUSTWIPE	0055					7/13/2010	
<input type="checkbox"/>	Details 2011001513	HOUSEKEEPING	Issued and In Process	No	PHILLIPS, KATHY (kphillip)	WALLACE, MICHELE (mwalla38)	HSPK-CARPET	0041	01				7/7/2010	
<input type="checkbox"/>	Details 2011001511	HOUSEKEEPING	Issued and In Process	No	PRESLEY, LOIS (lpresley)		HSPK-OTHER	0036	01	138	Office		7/7/2010	
<input type="checkbox"/>	Details 2011000059	HOUSEKEEPING	Issued and In Process	No	KAPERONIS, GEORGE (gkaperon)		HSPK-TILE	0019	01	126	204		6/28/2010	
<input type="checkbox"/>	Details 2010053224	HOUSEKEEPING	Issued and In Process	No	KEIDEL, ELLEN (eskeidel)	CARLE, RAMAH (rharle)	HSPK-CARPET	0036	04	411	Office		6/23/2010	
<input type="checkbox"/>	Details 2010050444	HOUSEKEEPING	Issued and In Process	No	MCCAIN, ARZELLA (arzbaker)	KISH, GREGORY (gkish)	HSPK-TILE	0041					6/1/2010	

Housekeeping Supervisor selects the Complete WR task within Supervisor/PA role. To assign CFs, select the Details button to open WR details.

Assign CF to Non-Reimbursable WR

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Building Operations Management

Building Operations

Supervisor / PA

Tasks:

Work Requests

- Create Work Request
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- Review & Issue Work Requests
- Issue Approved Work Requests
- Edit Work Request
- Edit Work Request Description
- Update Submitted Work Request
- Print Work Request
- Update/Complete locked WR Estimates

Completion

- Complete WR

Work Request

	Work Request Code	Request Type	Work Request Status
<input type="checkbox"/>	Details 2011005533	HOUSEKEEPING	Issued a
<input type="checkbox"/>	Details 2011005163	HOUSEKEEPING	Issued a
<input type="checkbox"/>	Details 2011005054	HOUSEKEEPING	Issued a
<input type="checkbox"/>	Details 2011004233	HOUSEKEEPING	Issued a
<input type="checkbox"/>	Details 2011004226	HOUSEKEEPING	Issued a
<input type="checkbox"/>	Details 2011004041	HOUSEKEEPING	Issued a
<input type="checkbox"/>	Details 2011003022	HOUSEKEEPING	Issued a
<input type="checkbox"/>	Details 2011002174	HOUSEKEEPING	Issued a
<input type="checkbox"/>	Details 2011001513	HOUSEKEEPING	Issued a
<input type="checkbox"/>	Details 2011001511	HOUSEKEEPING	Issued a
<input type="checkbox"/>	Details 2011000059	HOUSEKEEPING	Issued a
<input type="checkbox"/>	Details 2010053224	HOUSEKEEPING	Issued a
<input type="checkbox"/>	Details 2010050444	HOUSEKEEPING	Issued a

Work Request Details

CF Hours | Complete and Ready to Bill | Complete WR | Return to Issue | Cancel WR | Save

Work Request Code: 2011005533 Request Type: HOUSEKEEPING

Work Request Status: Issued and In Process Problem Type: HSKP-CARPET

Requested by: PRESLEY, LOIS (lpresley) Requested for:

Building Code: 0036 Floor Code: 01

Reese

Room Code: 142 Problem Location: Conf. Room

Index/Fund Account: 118130 Banner Account Code: 928185

Equipment Code: Date Work Requested: 8/6/2010

Date Out of Service: Time Out of Service:

M/D/YYYY

Date In Service: Time in Service:

M/D/YYYY

Repair Type: Cause Code:

Work Description: Water standing in Reese 142. Urgent need. Please bring mops

Craftspersons Notes: [KISH, GREGORY (gkish) Mon Aug 09 15:03:02 2010] - check floor 8/9/10

Update Craftperson Notes:

Estimated Cost of Shop Stock: 0.00 Project Request Code:

Close

HSKPG Supervisor selects the Details button to display the WR details screen. After reviewing, the Supervisor select the CF Assign to assign personnel to the WR

Assigning Craftsperson & HRs to Work Request



The Action Items located on the WR Details view provides ability for the HSKPG Supervisor to assign HSKPG personnel to the WR for Completion.

After selecting the CF Hours button, the Assign CF window displays for adding other CFs to the WR. Use the ellipse buttons to view and select the Craftsperson name.

After entering the information, select the SAVE button on the CF Assign windowpane to add the CF to the WR.

Work Is Complete and Actual Hours Updated

Work Request Details

CF Hours

Complete and Ready to Bill

Complete WR

Return to Issue

Cancel WR

Save

Work Request Details

Work Request Code: 2010008994
 Work Request Status: Issued and In Progress
 Requested by: GONZALES, LOLITA (lgonza15)
 Building Code: 0058
 Room Code: 258
 Index/Fund Account: 118130
 Equipment Code:
 Date Out of Service:
 Date In Service:
 Repair Type:
 Work Description: There's a chemical spot in Grigg Room #215a to be cleaned. Please repair or replace carpet stain. Contact person is Dr. Yong Zhang.
 Craftspersons Notes:
 Update Craftperson Notes:
 Estimated Cost of Shop Stock: 0.00
 Cost of Shop Stock: 0.00
 Cost of Parts: 0.00
 Other Costs: 0.00
 Actual Labor Hours: 4.00
 Cost of Labor: 88.56
 Total Cost: 88.56
 Ready to be Finalized?:

Request Type: HOUSEKEEPING
 Problem Type: HSKP-CARPET
 Requested for:
 Floor Code: 02
 Problem Location: 215a
 Banner Account Code: 928185
 Date Work Requested: 5/12/2010
 Time Out of Service:
 Time in Service:
 Cause Code:

Project Request Code:
 Budget Est. Cost of Shop Stock: 0.00
 Budget Est. Cost of Parts: 0.00
 Budget Est. Other Costs: 0.00
 Budget Est. Labor Hours: 0.00
 Budget Est. Cost of Labor: 0.00
 Budget Est. Total Cost: 0.00

Craftperson Code	Craftperson Name	Date Craftperson Assigned	Estim. Hours	Function Code	Function Level	Total Hours	Total Labor Cost	Assign By
RADUCKET	DUCKETT, RAYMOND	8/15/2010	0.00	HOUSEKEEPING	1	2.00	44.28	
COMASON	MASON, CRYSTAL D.	5/17/2010	2.00	HOUSEKEEPING	1	0.00	0.00	
GBAQUERO	BAQUERO, GLADYS	8/15/2010	2.00	HOUSEKEEPING	1	2.00	44.28	

Once the Work has been completed, Actual Hours, if not already added, will be updated using the CF Hours action button from within the Complete WR windowpane.



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Complete WR: Update Hours

Work Request Details

CF Hours | Complete and Ready to Bill | **Complete WR** | Return to Issue | Cancel WR | Save

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Building Operations Management

Building Operations

Supervisor / PA

Tasks:

Work Requests

- Create Work Request
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- Issue Approved Work Requests
- Edit Work Request
- Edit Work Request Description
- Update Submitted Work Request
- Print Work Request

Completion

- Complete WR
- Review Equipment Status

Complete Work Request

Work Request | Work Request Details

Filter

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: []

Requested Date From: [M/D/YYYY] Requested Date To: [M/D/YYYY]

Work Request	Work Request Code	Work Request Status	FUPLOAD Date	Requested by	Requested for	Problem Type	Building Code
<input type="checkbox"/>	2009043818	Issued and In Process		FERGUSON, JAMES (jcfergus)	FERGUSON, JAMES (jcfergus)	EL-OTHER	0046
<input type="checkbox"/>	2009043821	Issued and In Process		SMITH, NANCY (nmsmith)		GND-OTHER	1001
<input type="checkbox"/>	2010008687	Issued and In Process		SHORES, CHRISTOPHER (cwshores)		GS-OTHER	0019
<input type="checkbox"/>	2010008688	Issued and In Process		PATERNITI, MARK (mpaterni)	SUTHERLAND, ARTHUR (asutherl)	HVAC-OTHER	0035

Complete Work Request

Work Request Details

Complete and Ready to Bill | **Complete WR** | Return to Issue | Cancel WR | Save

Work Request Code: 2009043818 Request Type: BUILDING OPERATION

Work Request Status: Issued and In Process Problem Type: EL-OTHER

Requested by: FERGUSON, JAMES (jcfergus) Requested for: FERGUSON, JAMES (jcfergus)

Building Code: 0046 Floor Code: 00

Room Code: 089 Problem Location: MBB Locker Room

Index/Fund Account: 334577 Banner Account Code: 951760

Equipment Code: [] Date Work Requested: 4/15/2009

Date Out of Service: [M/D/YYYY] Time Out of Service: []

Date In Service: [M/D/YYYY] Time in Service: []

Repair Type: [] Cause Code: []

Work Description: 2 fire strobes need to be relocated in MBB locker room. Contact Forrest Shook 7-4808 or Grant Moon 7-4809 for more instructions.

Craftpersons Notes: []

Update Craftperson Notes: []

Estimated Cost of Shop Stock: 0.00 Project Request Code: []

Cost of Shop Stock: 0.00 Budget Est. Cost of Shop Stock: 0.00

Cost of Parts: 0.00 Budget Est. Cost of Parts: 0.00

Other Costs: 0.00 Budget Est. Other Costs: 0.00

Cost of Labor: 101.61 Budget Est. Cost of Labor: 0.00

Total Cost: 101.61 Budget Est. Total Cost: 0.00

Ready to be Finalized?:

From the Details windowpane of the Complete WR task, screen, the HSKPG Supervisor can update actual hours and mark the WR completed.

Complete WR: Mark Multiple WRs Completed

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Building Operations Management

Building Operations

Supervisor / PA

Tasks:

Work Requests

- Create Work Request
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- Review & Issue Work Requests
- Issue Approved Work Requests
- Edit Work Request
- Edit Work Request Description
- Update Submitted Work Request
- Print Work Request

Completion

- Complete WR
- Review Equipment Status

Filter Show Clear i

From Work Request Code:

To Work Request Code:

Index/Fund Account:

Sub-Department Code:

Requested by:

Requested for:

Equipment Code:

Building Code:

Problem Type:

Work Urgency:

Shop/Zone Code:

Status:

Requested Date From:

Requested Date To:

Ready for Billing?:

M/D/YYYY M/D/YYYY M/D/YYYY

Work Request Complete Selected Complete and Ready to Bill Cancel i

<input type="checkbox"/>	Work Request Code	Request Type	Work Request Status	Ready for Billing?	Requested by	Requested for	Problem Type	Building Code	Floor Code	Room Code	Problem Location	Project Number	Date Requested
<input checked="" type="checkbox"/>	Details	2010045963	HOUSEKEEPING	Issued and In Process	No	ROWE, DANIEL (dnrowe)	HSKP-CARPET	0012	02	274	Smith 274 Muddy Carpet		4/28/201
<input checked="" type="checkbox"/>	Details	2010045388	HOUSEKEEPING	Issued and In Process	No	ROWE, DANIEL (dnrowe)	HSKP-TILE	0012	03	COR1			4/23/201

After updating actual time, the HSKPG Supervisor may Complete one or multiple WRs, if needed, using the bulk select WR option from the Main Complete WR screen.



Housekeeping Processes

- Work is executed after CF Assignment by Supervisor
- Time (Actual Hours) are assigned to the work request
- Work Request is Marked Completed by HSKPG Supervisor
- All Completed WRs Reviewed by HSKPG Admin Assistant or Coordinator
- WR Customer is contacted for follow up by HSKPG Admin Assistant; CF Notes are updated.
- Request is Completed/Finalized or Reverted back to Issue and In Process Status for Work Follow up/Completion.



Part 3: Housekeeping Supervisor Role— Archibus Functionality

- Reviewing/Issuing PM Work Requests
- Locating Work Requests—Active, Historic, or All
- Print WR features



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Housekeeping Supervisor Role: Issue Approved WRs (PMs & Project WRs)

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Building Operations Management

Building Operations

Supervisor / PA

Tasks:

Work Requests

- Create Work Request
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- Edit Work Request
- Edit Work Request Description
- Update Submitted Work Request

Work Requests

Work Request Code	Request Type	Problem Type
2010055096	PREVENTIVE MAINTENANCE	PREVENTIVE MAINTENANCE
2010054706	PREVENTIVE MAINTENANCE	PREVENTIVE MAINTENANCE
2010054287	PREVENTIVE MAINTENANCE	PREVENTIVE MAINTENANCE
2010054067	PREVENTIVE MAINTENANCE	PREVENTIVE MAINTENANCE
2010053727	PREVENTIVE MAINTENANCE	PREVENTIVE MAINTENANCE
2010053234	PREVENTIVE MAINTENANCE	PREVENTIVE MAINTENANCE
2010052815	PREVENTIVE MAINTENANCE	PREVENTIVE MAINTENANCE
2010052439	PREVENTIVE MAINTENANCE	PREVENTIVE MAINTENANCE
2010051997	PREVENTIVE MAINTENANCE	PREVENTIVE MAINTENANCE
2010051738	PREVENTIVE MAINTENANCE	PREVENTIVE MAINTENANCE
2010051234	PREVENTIVE MAINTENANCE	PREVENTIVE MAINTENANCE
2010050627	PREVENTIVE MAINTENANCE	PREVENTIVE MAINTENANCE
2010050274	PREVENTIVE MAINTENANCE	PREVENTIVE MAINTENANCE
2010049789	PREVENTIVE MAINTENANCE	PREVENTIVE MAINTENANCE
2010049585	PREVENTIVE MAINTENANCE	PREVENTIVE MAINTENANCE
2010049161	PREVENTIVE MAINTENANCE	PREVENTIVE MAINTENANCE
2010048254	PREVENTIVE MAINTENANCE	PREVENTIVE MAINTENANCE
2010047456	PREVENTIVE MAINTENANCE	PREVENTIVE MAINTENANCE
2010046558	PREVENTIVE MAINTENANCE	PREVENTIVE MAINTENANCE
2010046195	PREVENTIVE MAINTENANCE	PREVENTIVE MAINTENANCE
2010045501	PREVENTIVE MAINTENANCE	PREVENTIVE MAINTENANCE
2010044514	PREVENTIVE MAINTENANCE	PREVENTIVE MAINTENANCE
2010043593	PREVENTIVE MAINTENANCE	PREVENTIVE MAINTENANCE

Request Type: PREVENTIVE MAINTENANCE
WR Code: 2010055096
Problem Type: PREVENTIVE MAINT
Preventive Maintenance
Shop/Zone Code: HK00Z1
Cause Code:
Repair Type:
Customer Documentation:
Problem Location:
Est. Comp. Date: 8/16/2010
Est. Comp. Time: 12:00

Requested by: PM AUTO GENERATION ()
Requested for:
Requestor's Phone #:
Work Request Status: Approved
Budget Est. Total Cost: 221.40
Sub-Department Code: 14800
Department Code: 1260
Housekeeping (Dpt)
Date Work Requested: 08/15/2010
Req. Comp. Date:
Req. Comp. Time:

Print | **CF Assign** | Crew Assign | Issue | Reject | Save | Cancel

Add / Edit Estimated Hours

Function Code: HOUSEKEEPING
Craftsperson Code: GTOWNE1
Time Assigned: 6:23
Additional Comments:

Function Level: 1
Date Assigned: 8/15/2010
Estimated Hours: 2.00

Budget Est. Labor Hours: 10.00

Supervisor reviews the PM within the Issue Approved WR window.

After selecting the CF Assign button, the Supervisor will assign at least one personnel and estimated hrs to the PM WR and select SAVE.



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Housekeeping Supervisor Role: Issuing Approved WR

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- Building Operations Management
- Building Operations
- Supervisor / PA

Tasks:

Work Requests

- Create Work Request
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- Edit Work Request
- Edit Work Request Description
- Update Submitted Work Request

After assigning CFs/estimates to the WR, the Supervisor will Issue the Approved WR for completion.

After Issue/In Process status, the WR may be accessed for additional CF assignment and actual HRs via the Complete WR view.

Work Requests

Work Request Code	Request Type	Problem Type
2010055096	PREVENTIVE MAINTENANCE	PREVENTIVE MAINTENANCE
2010054706	PREVENTIVE MAINTENANCE	PREVENTIVE MAINTENANCE
2010054287	PREVENTIVE MAINTENANCE	PREVENTIVE MAINTENANCE
2010054067	PREVENTIVE MAINTENANCE	PREVENTIVE MAINTENANCE
2010053727	PREVENTIVE MAINTENANCE	PREVENTIVE MAINTENANCE
2010053234	PREVENTIVE MAINTENANCE	PREVENTIVE MAINTENANCE
2010052815	PREVENTIVE MAINTENANCE	PREVENTIVE MAINTENANCE
2010052439	PREVENTIVE MAINTENANCE	PREVENTIVE MAINTENANCE
2010051997	PREVENTIVE MAINTENANCE	PREVENTIVE MAINTENANCE
2010051738	PREVENTIVE MAINTENANCE	PREVENTIVE MAINTENANCE
2010051234	PREVENTIVE MAINTENANCE	PREVENTIVE MAINTENANCE
2010050627	PREVENTIVE MAINTENANCE	PREVENTIVE MAINTENANCE
2010050274	PREVENTIVE MAINTENANCE	PREVENTIVE MAINTENANCE
2010049789	PREVENTIVE MAINTENANCE	PREVENTIVE MAINTENANCE
2010049585	PREVENTIVE MAINTENANCE	PREVENTIVE MAINTENANCE
2010049161	PREVENTIVE MAINTENANCE	PREVENTIVE MAINTENANCE
2010048254	PREVENTIVE MAINTENANCE	PREVENTIVE MAINTENANCE
2010047456	PREVENTIVE MAINTENANCE	PREVENTIVE MAINTENANCE
2010046558	PREVENTIVE MAINTENANCE	PREVENTIVE MAINTENANCE
2010046195	PREVENTIVE MAINTENANCE	PREVENTIVE MAINTENANCE
2010045501	PREVENTIVE MAINTENANCE	PREVENTIVE MAINTENANCE
2010044514	PREVENTIVE MAINTENANCE	PREVENTIVE MAINTENANCE
2010043593	PREVENTIVE MAINTENANCE	PREVENTIVE MAINTENANCE

Request Type: PREVENTIVE MAINTENANCE
 Requested by: PM AUTO GENERATION ()
 WR Code: 2010055096
 Requested for:
 Problem Type: PREVENTIVE MAINT
 Requestor's Phone #:
 Preventive Maintenance
 Shop/Zone Code: HK00Z1
 Work Request Status: Approved
 Cause Code:
 Budget Est. Total Cost: 221.40
 Repair Type:
 Sub-Department Code: 14800
 Housekeeping
 Customer Documentation:
 Department Code: 1260
 Housekeeping (Dpt)
 Problem Location:
 Date Work Requested: 08/15/2010
 Est. Comp. Date: 8/16/2010
 Req. Comp. Date:
 8/16/2010
 Est. Comp. Time: 12:00
 Req. Comp. Time:
 12:00
 Date Out of Service:
 Time Out of Service:
 M/D/YYYY
 Date In Service:
 Time in Service:
 M/D/YYYY
 Equipment Code:
 Building Code: 0020
 McEntry
 Room Code:
 Floor Code:
 Index/Fund Account: 118130
 Work Request Priority: Routine
 Banner Account Code: 928185
 Is this WR reimbursable?: No
 Work Description: [Instructions: Weekly Repair Housekeeping Equipment in Kennedy 150 (Campus-Wide Buildings)]
 Craftspersons Notes:
 Update Craftperson Notes:
 Budget Est. Labor Hours: 10.00



UNC CHARLOTTE

Find Work Requests

- ✓ Find Work Requests - Active
- ✓ Find Work Requests - History
- ✓ Find Work Requests - All
- ✓ Review Event Work Requests

Use the mini console to enter or select search criteria. Enter the work request number into the "From" and "To" fields and then select Search Now to locate your work request.

After selecting the Search Now button, the WRs will display below.

The XLS button may be used to export data into an Excel spreadsheet

Search Work Requests Search Now | Show All

From Work Request:	<input type="text"/>	To Work Request:	<input type="text"/>	Request Type:	<input type="text"/>
Sub-Department Code:	<input type="text"/>	Index/Fund Account:	<input type="text"/>	Banner Account Code:	<input type="text"/>
Problem Type:	<input type="text"/>	Requested by:	DUFF, PAMELA (pduff)	Requested for:	<input type="text"/>
Equipment Code:	<input type="text"/>	Building Code:	<input type="text"/>	From Cost Total:	<input type="text"/>
Shop/Zone Code:	<input type="text"/>	Craftsperson:	<input type="text"/>	Status:	<input type="text"/>
Reimbursable?:	<input type="text"/>	Requested Date From:	<input type="text"/>	Requested Date To:	<input type="text"/>
Requested:	Date Range		M/D/YYYY		M/D/YYYY

Work Request Search Results XLS

	Work Request Code	Request Type	Index/Fund Account	Banner Account Code	Sub-Department Code	Department Code	Requested by	Requested for	Building Code	Floor Code	Room Code	Problem Location	Work Request Status	Shop/Zone Code	Date to Perform
Details	2011002104	BUILDING OPERATION	118120	930950	13900	1240	DUFF, PAMELA (pduff)	DINELLO, RAYMOND (rdinello)	0055	02	228	cubicle	Issued and In Process	MOZ06	
Details	2011002103	BUILDING OPERATION	118120	930950	13900	1240	DUFF, PAMELA (pduff)	DINELLO, RAYMOND (rdinello)	0055	02	228	FIS area	Completed	MOZ06	



Print WR Options

Work Requests

- Create Work Request
- Update/Complete WR Estimates
- Supervisor WR Dashboard
- Review & Issue Work Requests
- Issue Approved Work Requests
- Edit Work Request
- Edit Work Request Description
- Update Submitted Work Request
- Print Work Request

In the Print WR task, a Craftsperson and Request Type may be selected to narrow the WR search.

To select and print multiple work request, select the topmost check box in the grey Work Request Search Results window. Deselect WRs as needed and select Print WR PDF button to review and print WRs selected.

Search Work Requests Search Now | Show All

From Work Request: To Work Request: Request Type: BUILDING OPERATION

Department Code: Index/Fund Account: Banner Account Code:

Problem Type: Requested by: Requested for:

Equipment Code: Building Code: Work Urgency:

Shop/Zone Code: From Cost Total: To Cost Total:

Reimbursable?: PM Work Request?: Status:

Requested: Date Range Requested Date From: Requested Date To:

Craftsperson: AARGUETA

Work Request Search Results Print Work Order

<input checked="" type="checkbox"/>	Work Request Code	Request Type	Index/Fund Account	Banner Account Code	Department Code	Division Code	Requested by	Requested for
<input checked="" type="checkbox"/>	2010009151	BUILDING OPERATION	330510	928180	29700	2700	FOUST, KATHY (kfoust3)	
<input checked="" type="checkbox"/>	2010008964	BUILDING OPERATION	330510	928180	29700	2700	BURKETTE, DAVID (dlburket)	
<input checked="" type="checkbox"/>	2010008764	BUILDING OPERATION	336337	951760	29000	2660	MCDANIEL, BONNIE (bjmodani)	TILLET, NIA (njtillet)
<input checked="" type="checkbox"/>	2010008713	BUILDING OPERATION	118150	930600	14400	1250	SAWYER, MARGARET (masawyer)	GRAY, HOYLE (hrgray)
<input checked="" type="checkbox"/>	2010008712	BUILDING OPERATION	118150	930600	14400	1250	SAWYER, MARGARET (masawyer)	GRAY, HOYLE (hrgray)
<input checked="" type="checkbox"/>	2010008583	BUILDING OPERATION	336337	951760	29000	2660	MCDANIEL, BONNIE (bjmodani)	TILLET, NIA (njtillet)
<input checked="" type="checkbox"/>	2010008577	BUILDING OPERATION	118150	930600	14200	1250	DEAL, EVA (ejdeal)	CAMPBELL, JAMES (jaca)
<input checked="" type="checkbox"/>	2010008575	BUILDING OPERATION	118150	930600	14200	1250	DEAL, EVA (ejdeal)	CAMPBELL, JAMES (jaca)
<input checked="" type="checkbox"/>	2010007905	BUILDING OPERATION	116210	948340	28500	2610	HERON, LORRIE (lheron1)	
<input checked="" type="checkbox"/>	2010007790	BUILDING OPERATION	330510	928180	29700	2700	FOUST, KATHY (kfoust3)	
<input checked="" type="checkbox"/>	2010007462	BUILDING OPERATION	334010	928330	11200	1070	DEAL, EVA (ejdeal)	SMITH, NANCY (nmsmit)
<input checked="" type="checkbox"/>	2010006223	BUILDING OPERATION	330510	928180	29700	2700	BURKETTE, DAVID (dlburket)	
<input checked="" type="checkbox"/>	2010006148	BUILDING OPERATION	330517	928180	29700	2700	BURKETTE, DAVID (dlburket)	
<input checked="" type="checkbox"/>	2010006125	BUILDING OPERATION	330517	928180	29700	2700	DEAL, EVA (ejdeal)	FOUST, KATHY (kfoust3)
<input checked="" type="checkbox"/>	2010005148	BUILDING OPERATION	118150	930600	17800	1500	KAPERONIS, GEORGE (gkaperon)	
<input checked="" type="checkbox"/>	2010003384	BUILDING OPERATION	117475	951760	30650	2850	ROWLEE, ANNE (arowlee)	ROWLEE, ANNE (arowlee)
<input checked="" type="checkbox"/>	2010003378	BUILDING OPERATION	117475	948620	30650	2850	ROWLEE, ANNE (arowlee)	ROWLEE, ANNE (arowlee)
<input checked="" type="checkbox"/>	2009041761	BUILDING OPERATION	118100	930600	14000	1240	MCLAUGHLIN, MELISSA (mamclaug)	RAMSEY, DONALD (dran)



Edit WR

Edit WR Details view allows Supervisor/PA to mark Equipment Out of Service/In Service and to Update Craftsperson Notes.

Supervisor/PA may also upload Documents.



UNC CHARLOTTE

Review and Issuing Approved WRs (Project WRs and PMs)

UNC CHARLOTTE

- Building Operations Management
- Building Operations
- Supervisor / PA

Tasks:

Work Requests

- Create Work Request
- Update/Complete WR Estimates
- Supervisor WR Dashboard
- Review & Issue Work Requests
- Issue Approved Work Requests**
- Edit Work Request
- Edit Work Request Description
- Update Submitted Work Request
- Print Work Request
- Update/Complete locked WR Estimates

Print | CF Assign | Crew Assign | Issue | Reject | Save | Cancel

Print | CF Assign | Crew Assign | Issue | Reject | Save | Cancel

Request Type:	PREVENTIVE MAINTENANCE	Requested by:	PM AUTO GENERATION
WR Code:	2011006666	Requested for:	
Problem Type:	PREVENTIVE MAINT Preventive Maintenance	Requestor's Phone #:	
Shop/Zone Code:	MOZ06	Work Request Status:	Approved
Cause Code:		Budget Est. Total Cost:	58.48
Repair Type:		Sub-Department Code:	14400 Facilities Management Z
Customer Documentation:		Department Code:	1250 Maintenance and Opera
Problem Location:		Date Work Requested:	08/16/2010
Est. Comp. Date:*	8/17/2010 8/17/2010	Req. Comp. Date:	
Est. Comp. Time:*	12:00 12:00	Req. Comp. Time:	
Date Out of Service:		Time Out of Service:	
Date In Service:		Time in Service:	
Equipment Code:		Building Code:	0001

After reviewing and adding CF(s) and Estimate to WR, select the Issue button to issue the work request for completion.



UNC CHARLOTTE

Supervisor Role: New Functionality



NEW Craftsperson Weekly Timesheet

- Tech**
- Assign Craftsperson
 - Update Hours by Crew
 - Enter Time Off
 - Review Time Off
 - Crew Maintenance
 - Craftsperson Maintenance
 - Review Craftsperson by Shop
 - Review Craftsperson Positions
 - Review All Time by Craftsperson
 - Review Function Labor Rates
 - CF Assignments by Date
 - CF Function Level Hours
 - ⇒ Craftsperson Weekly Timesheet**

Craftsperson Code	Craftsperson Name
AARGUETA	ARGUETA, ARNULFO
ABVANHOY	VANHOY, ARNOLD
ACRESENZI	CRESENZI, ANTHONY
ADJOYNER	JOYNER, ANNIE
AGUION1	GUION, ALEXANDER
ALLEGIANCE	ALLEGIANCE TEMP
AMLAVOIE	LAVOIE, ANDREW M.
ARZBAKER	MCCAIN, ARZELLA Y.
ATHURMON	THURMOND, ANTHONY
ATTUCKER	TUCKER, ARNOLD
ATW	Vega, Hubert
AVMONTAL	VAZQUEZ-MONTALVO, ARMANDO
BANDERSE	ANDERSEN, BARRY
BBRANTL6	BRANTLEY, BARCLAY
BKERSCHN	Kerschner, Bruce
BKIRKMA1	KIRKMAN, BARRY
BMHANCOC	HANCOCK, BEVERLY

timesheet Set Restriction | Clear Restriction

Craftsperson Code:* AARGUETA

Date Choose:* 8/2/2010

Date Start:* 8/2/2010

Date End:* 8/8/2010

August 2010

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

After selecting the CF and the week using the calendar button, select the Set Restriction button to view their Timesheet and their associated WRs.



NEW Craftsperson Weekly Timesheet

Tech

- Assign Craftsperson
- Update Hours by Crew
- Enter Time Off
- Review Time Off

- Crew Maintenance
- Craftsperson Maintenance

- Review Craftsperson by Shop
- Review Craftsperson Positions
- Review All Time by Craftsperson
- Review Function Labor Rates
- CF Assignments by Date
- CF Function Level Hours

[→ Craftsperson Weekly Timesheet](#)

Work Assignments for Craftsperson ALLEGIANCE

Mon-2010-08-09		Tue-2010-08-10		Wed-2010-08-11		Thu-2010-08-12		Fri-2010-08-13		Sat-2010-08-14		Sun-2010-08-15	
Str.	Ovr.	Str.	Ovr.	Str.	Ovr.	Str.	Ovr.	Str.	Ovr.	Str.	Ovr.	Str.	Ovr.
8		8		8		8		8					
PTO	Tot.	PTO	Tot.	PTO	Tot.	PTO	Tot.	PTO	Tot.	PTO	Tot.	PTO	Tot.
			8		8		8		8				

2010049277	<input type="text" value="GROUNDS"/>	status=I	[Instructions: Inspect walkways for gum,
2	6	8	
2	2	6	

2010050031	<input type="text" value="GROUNDS"/>	status=I	[Instructions: INSPECT FIRST AID KITS, C
2	2	6	

2011001802	<input type="text" value="GROUNDS"/>	status=I	[Instructions: MOW, TRIM, BLOW WALKWAYS,
4	1		

As time is entered, the hours will populate within the fields and total for that day. Once all time is entered select the SAVE HOURS button to save the entries. You may also print the Time sheet, if needed.



UNC CHARLOTTE

WR Status's available for edit in the new Weekly Time Sheet:

- Issued & In Process
- Completed but Not Marked Ready for Bill
- **Please Note:** Any work request that is in “Locked” status will not display on the timesheet view



UNC CHARLOTTE

Housekeeping Equipment Maintenance and PM



UNC CHARLOTTE

Equipment Updates

- Identification and labeling of equipment
- Stencil with equipment ID, location, etc



UNC CHARLOTTE

Drawing & Mapping Reports



GIS Mapping

- Locate Employee
- Create WR from Map
- Design/Construction Projects (Thematic)
- M & O Zone Map
- Building WR Stats
- Emergency WRs



UNC CHARLOTTE

Search and Select the Employee(from the list. Then select Show employee to display the Building where the employee is located on the map.

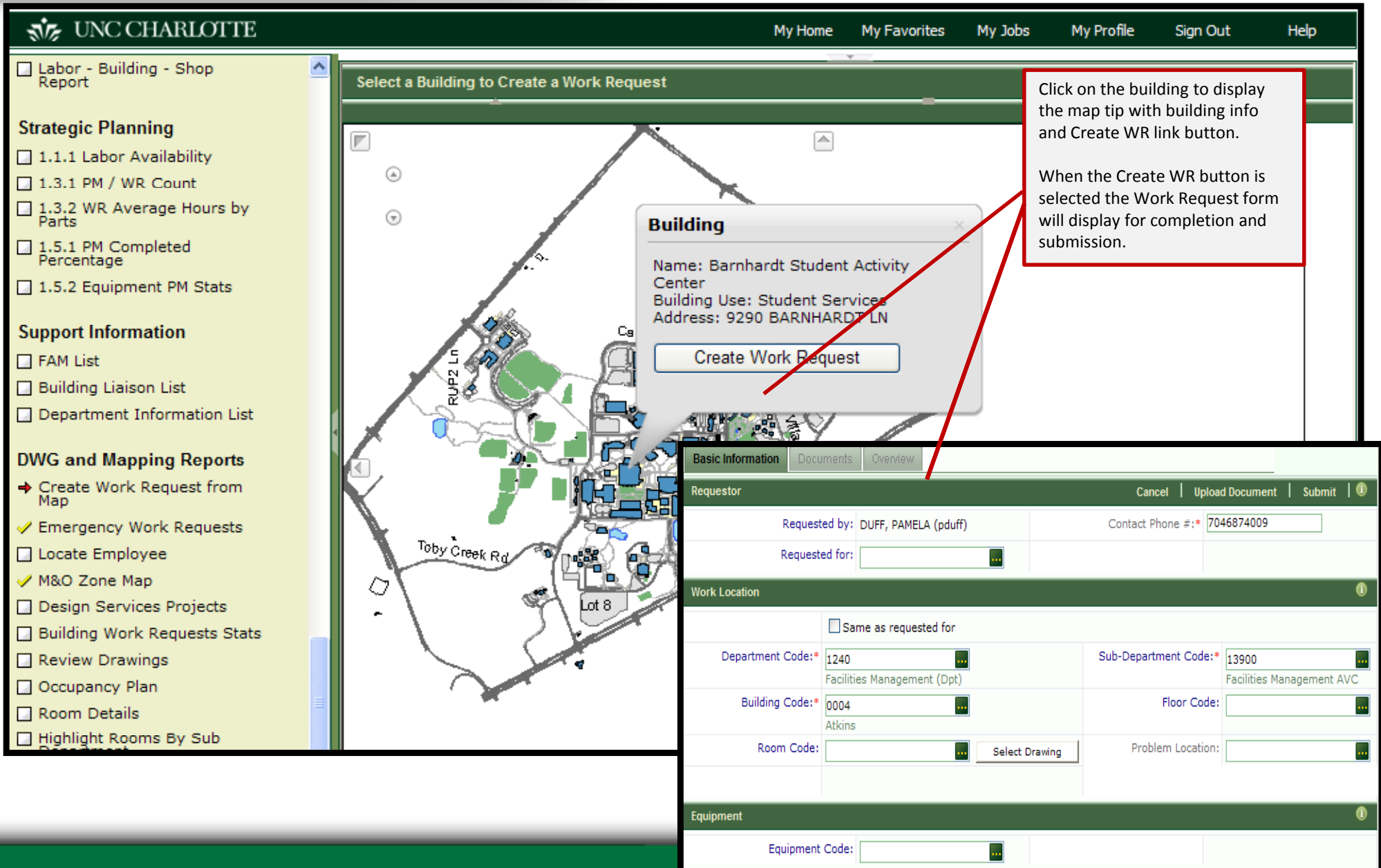
Locate Employee

Next, click the building to display the employee Location map tip.

By selecting the Office Location link, the Building Floor Plan will display highlighting the employee's office location.

Employee Name	Name - First	Name - Last
<input type="checkbox"/>	di	
<input type="checkbox"/>	DICKINSON, KATHERINE (kddickin)	Katherine Dickin
<input checked="" type="checkbox"/>	DINELLO, RAYMOND (rdinello)	Raymond Dinell
<input type="checkbox"/>	SIMS, DIONTE (dmsims)	Dionte Sims
<input type="checkbox"/>	TURNER, JODI (jodturne)	Jodi Turne

Create WR from Map



The screenshot displays the UNC Charlotte Work Request system interface. On the left is a navigation menu with categories like Strategic Planning, Support Information, and DWG and Mapping Reports. The main area shows a map titled "Select a Building to Create a Work Request". A tooltip for the "Barnhardt Student Activity Center" is visible, containing building details and a "Create Work Request" button. A red box highlights this button and points to a text box explaining its function. Below the map, the "Work Request" form is partially visible, showing fields for Requestor, Work Location, and Equipment.

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Select a Building to Create a Work Request

Labor - Building - Shop Report

Strategic Planning

- 1.1.1 Labor Availability
- 1.3.1 PM / WR Count
- 1.3.2 WR Average Hours by Parts
- 1.5.1 PM Completed Percentage
- 1.5.2 Equipment PM Stats

Support Information

- FAM List
- Building Liaison List
- Department Information List

DWG and Mapping Reports

- Create Work Request from Map
- Emergency Work Requests
- Locate Employee
- M&O Zone Map
- Design Services Projects
- Building Work Requests Stats
- Review Drawings
- Occupancy Plan
- Room Details
- Highlight Rooms By Sub

Building

Name: Barnhardt Student Activity Center
 Building Use: Student Services
 Address: 9290 BARNHARDT LN

Create Work Request

Click on the building to display the map tip with building info and Create WR link button.

When the Create WR button is selected the Work Request form will display for completion and submission.

Basic Information Documents Overview

Requestor Cancel | Upload Document | Submit | i

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

Requested for:

Work Location i

Same as requested for

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

Building Code: * 0004 Atkins Floor Code:

Room Code: Select Drawing Problem Location:

Equipment i

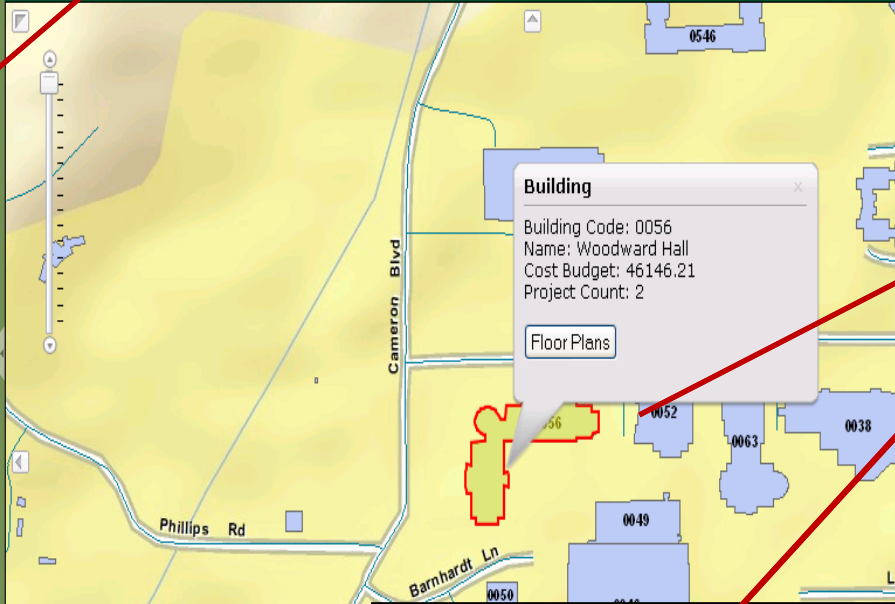
Equipment Code:

Search and Select the building(s) from the Design Projects in Construction list. Then select Show Project to display the Building location on the map.

Design Services Projects Thematic

Design Projects in Construction Show Projects Projects in Construction as Thematic Markers Based On Budget Cost

Building Code	Building Name
<input type="checkbox"/>	0004 Atkins
<input type="checkbox"/>	0012 Smith
<input type="checkbox"/>	0017 Belk Gymnasium
<input type="checkbox"/>	0018 Memorial Hall
<input type="checkbox"/>	0023 Facilities Operations & Parking Service
<input type="checkbox"/>	0035 Friday
<input type="checkbox"/>	0041 Storrs
<input type="checkbox"/>	0042 Cameron Hall
<input type="checkbox"/>	0046 Barnhardt Student Activity Center
<input type="checkbox"/>	0052 College of Education
<input type="checkbox"/>	0054 Bissell House
<input type="checkbox"/>	0055 Facilities Management & Police & Public Safety
<input checked="" type="checkbox"/>	0056 Woodward Hall
<input type="checkbox"/>	0063 College of Health and Human Services
<input type="checkbox"/>	0068 Bioinformatics
<input type="checkbox"/>	0069 Student Union
<input type="checkbox"/>	0501 Moore Hall
<input type="checkbox"/>	0503 Scott Hall
<input type="checkbox"/>	0504 Holshouser Hall
<input type="checkbox"/>	0536 Hickory
<input type="checkbox"/>	0560 Resident Managers House
<input type="checkbox"/>	1007 Union Deck

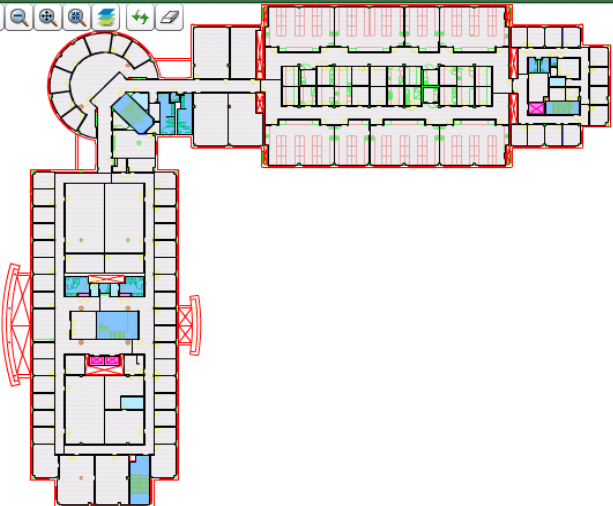


Next, click on the building to display the map tip.

To display the Floor Plan of the building, select the Floor Plan button located on the map tip.

Floors Highlights Departments Labels Employees Legend

Building	Buildin Name
<input type="checkbox"/>	0056 Woodw
<input checked="" type="checkbox"/>	0056 Woodw
<input type="checkbox"/>	0056 Woodw
<input type="checkbox"/>	0056 Woodw
<input type="checkbox"/>	0056 Woodw
<input type="checkbox"/>	0056 Woodw



Value
0000:Unassigned Space (S
1250:Facilities Management
1260:Housekeeping
1440:Biolog
1890:Mechanical Engineer
1970:College of Computin
1990:Computer Science
2080:ITS CIO
9900:Not Applicable



M & O Zone Map

Clicking on the location will display a screen tip identifying the Supervisor and PA along with contact numbers..

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Reimbursable Labor Report
 Labor Report
 Labor - Building - Shop Report

Strategic Planning

- 1.1.1 Labor Availability
- 1.3.1 PM / WR Count
- 1.3.2 WR Average Hours by Parts
- 1.5.1 PM Completed Percentage
- 1.5.2 Equipment PM Stats

Support Information

- FAM List
- Building Liaison List
- Department Information List

DWG and Mapping Reports

- Create Work Request from Map
- Emergency Work Requests
- Locate Employee
- M&O Zone Map
- Design Services Projects
- Building Work Requests Stats
- Review Drawings
- Occupancy Plan
- Room Details
- Highlight Rooms By Sub Department

Maintenance and Operations Zone Map

Legend

Buildings

- MOZ01
- MOZ02
- MOZ04
- MOZ05
- MOZ06
- Default

Building

Cameron Hall
9010 CRAVER RD
Supervisor: Stanley Trulove
Phone: 7046872190
Email: strulove@uncc.edu

PA: Margaret Sawyer
Phone: 7046872151

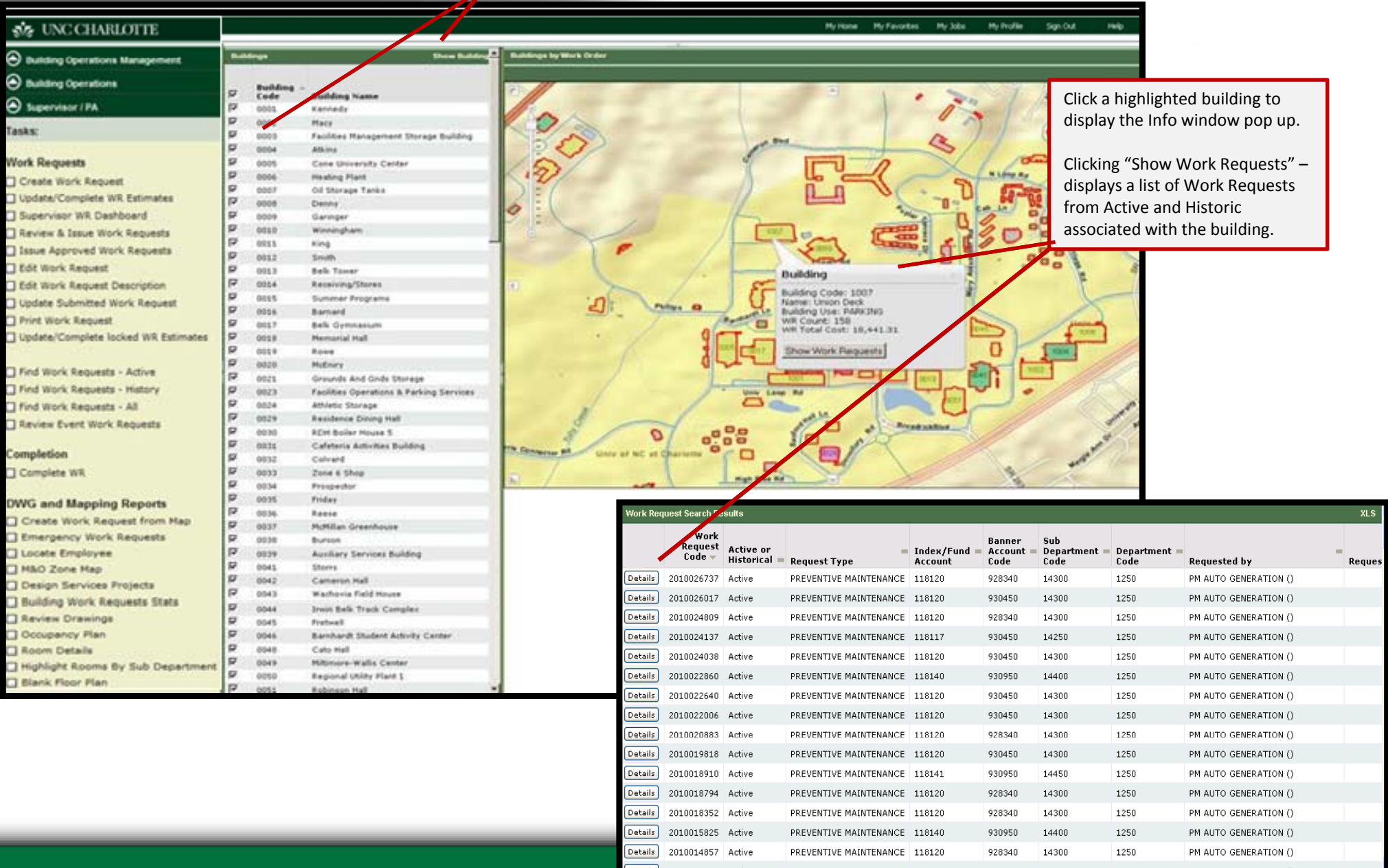
Map labels: RUP, Toby Creek Rd, Cameron Rd, Lot 8, Martin Village Rd

Building WR Stats

Select Building(s) using the box located beside the bldg name. Click "Show Buildings" to display the buildings on a map view

Click a highlighted building to display the Info window pop up.

Clicking "Show Work Requests" – displays a list of Work Requests from Active and Historic associated with the building.



The screenshot displays the 'Building Operations Management' interface. On the left is a navigation menu with sections for 'Tasks', 'Work Requests', 'Completion', and 'DWG and Mapping Reports'. The main area is divided into three panes: a 'Buildings' list, a 'Map View', and a 'Buildings by Work Order' pane. A red box highlights the 'Building Code' column in the list, with an arrow pointing to the map. Another red box highlights a building on the map, with an arrow pointing to an info pop-up window. A third red box highlights the 'Show Work Requests' button in the pop-up, with an arrow pointing to a table of work request search results.

	Work Request Code	Active or Historical	Request Type	Index/Fund Account	Banner Account Code	Sub Department Code	Department Code	Requested by	Reques
Details	2010026737	Active	PREVENTIVE MAINTENANCE	118120	928340	14300	1250	PM AUTO GENERATION ()	
Details	2010026017	Active	PREVENTIVE MAINTENANCE	118120	930450	14300	1250	PM AUTO GENERATION ()	
Details	2010024809	Active	PREVENTIVE MAINTENANCE	118120	928340	14300	1250	PM AUTO GENERATION ()	
Details	2010024137	Active	PREVENTIVE MAINTENANCE	118117	930450	14250	1250	PM AUTO GENERATION ()	
Details	2010024038	Active	PREVENTIVE MAINTENANCE	118120	930450	14300	1250	PM AUTO GENERATION ()	
Details	2010022860	Active	PREVENTIVE MAINTENANCE	118140	930950	14400	1250	PM AUTO GENERATION ()	
Details	2010022640	Active	PREVENTIVE MAINTENANCE	118120	930450	14300	1250	PM AUTO GENERATION ()	
Details	2010022006	Active	PREVENTIVE MAINTENANCE	118120	930450	14300	1250	PM AUTO GENERATION ()	
Details	2010020883	Active	PREVENTIVE MAINTENANCE	118120	928340	14300	1250	PM AUTO GENERATION ()	
Details	2010019818	Active	PREVENTIVE MAINTENANCE	118120	930450	14300	1250	PM AUTO GENERATION ()	
Details	2010018910	Active	PREVENTIVE MAINTENANCE	118141	930950	14450	1250	PM AUTO GENERATION ()	
Details	2010018794	Active	PREVENTIVE MAINTENANCE	118120	928340	14300	1250	PM AUTO GENERATION ()	
Details	2010018352	Active	PREVENTIVE MAINTENANCE	118120	928340	14300	1250	PM AUTO GENERATION ()	
Details	2010015825	Active	PREVENTIVE MAINTENANCE	118140	930950	14400	1250	PM AUTO GENERATION ()	
Details	2010014857	Active	PREVENTIVE MAINTENANCE	118120	928340	14300	1250	PM AUTO GENERATION ()	



The map will display indicating Emergency WRs in red. Clicking on the location will display the map tip and a link to view the WR.

Select Emergency WR report located within the task list of Supervisor/PA role

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My Home My Favorites My Jobs My Profile Sign Out Help

Emergency Work Requests

- Reimbursable Labor Report
- Labor Report
- Labor - Building - Shop Rep

Strategic Planning

- 1.1.1 Labor Availability
- 1.3.1 PM / WR Count
- 1.3.2 WR Average Hours by Parts
- 1.5.1 PM Completed Percentage
- 1.5.2 Equipment PM Stats

Support Information

- FAM List
- Building Liaison List
- Department Information List

DWG and Mapping Reports

- Create Work Request from Map
- Emergency Work Requests
- Locate Employee
- M&O Zone Map
- Design Services Projects
- Building Work Requests Stats
- Review Drawings
- Occupancy Plan
- Room Details
- Highlight Rooms By Sub Department
- Blank Floor Plan

Building
Barnhardt Student Activity Center
Show Work Request



UNC CHARLOTTE

Paginated Reports



UNC CHARLOTTE

Reports

Highlight Rooms by Sub Department

Drawing Reports

- Room Details (DWG)
- Locate Employee
- Occupancy Plan
- Room Details
- Highlight Rooms By Sub Department
- Blank Floor Plan

Highlight Rooms by Department Per Floor

Filter

Building Code: 0055 Floor Code: 02 Division Code: 1240 Department Code: 13900

Show Clear Paginated Report

Select Floor

Highlight Rooms by Department Per Floor

Summary by Department

Enter Building info within fields provided, then select Show to filter.

Select Floor

0055 Facilities Management & Police & Public Safety

02 0055102

1240-13900

Highlight Rooms for Floor: 0055-02, Department: 1240-13900

Drawing & detail buttons

Select Floor windowpane

Summary window

Summary by Department

Legend	Division Code	Department Code	Total Count	Total Area	Average Area
	1240	13900	37	6,082.15	164.38

Report Occupancy Plan

Paginated Report button is selected to view and print the report

Drawing Reports

- Room Details (DWG)
- Locate Employee
- Occupancy Plan
- Room Details
- Highlight Rooms By Sub Department
- Blank Floor Plan

A Paginated Report View window will display along with the progress bar. Once the report has generated 100%, select the link to view the report.



UNC CHARLOTTE

EDA Overview

- [Features and Functionality of the New MC55 EDA](#)
- [Enterprise Digital Assistant \(EDA\)](#)
- **Additional Information**
<http://business.motorola.com/mc55/index.html>





UNC CHARLOTTE

EDA WR Overview

- Easy field access to relevant work data (history, parts, etc)
- Ensure timely & complete capture of maintenance work
- Create field work orders & update to Archibus for follow-up
- Accurate parts & labor capture
- Leverage bar-coding for improved speed/accuracy
- Visibility to field work status
- Ability to modify or create new forms related to WR to capture more detailed information



UNC CHARLOTTE

Q&A





UNC CHARLOTTE

Facility Information Systems Points of Contact:

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