

Customer Documentation for ARCHIBUS Request Work Process:

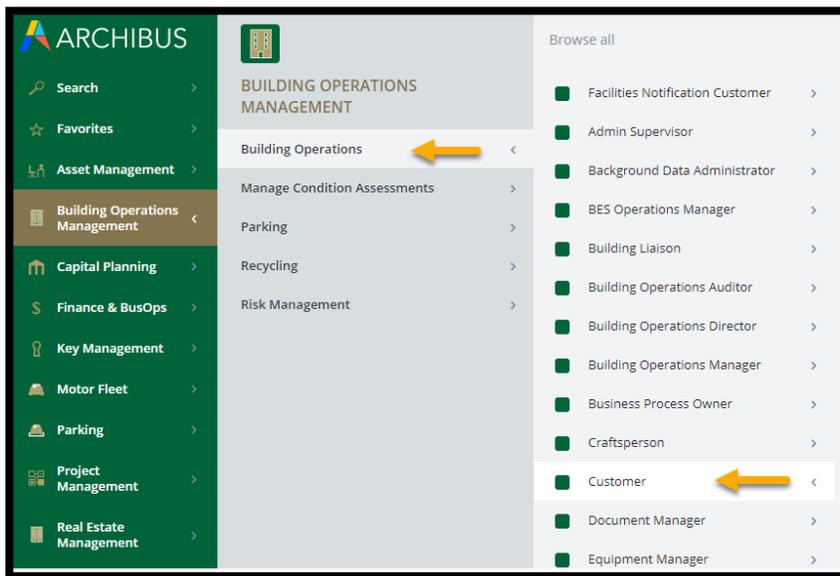
1. ARCHIBUS Sign in Page

Log into ARCHIBUS (<https://archibus.unccl.edu/archibus>) using your NinerNet credentials.



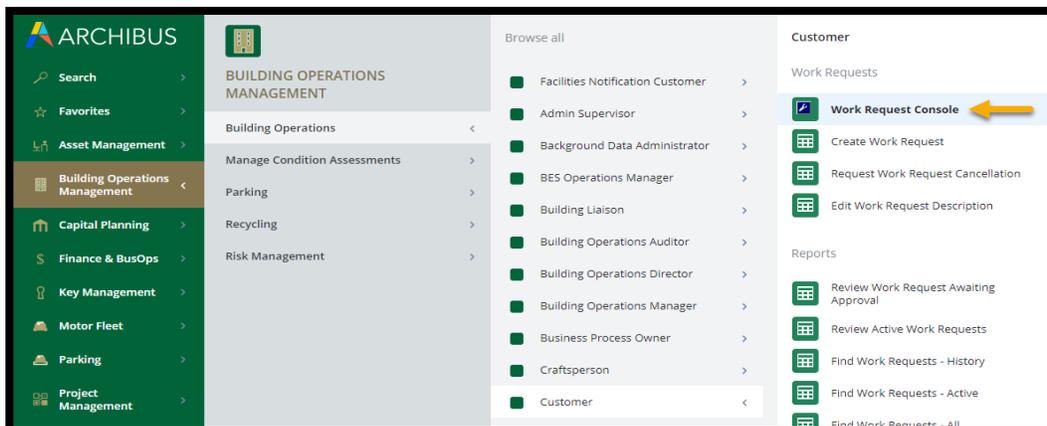
2. Process Navigation: Building Operations Management

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



Select **Building Operations Management** module, then **Building Operations** 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.



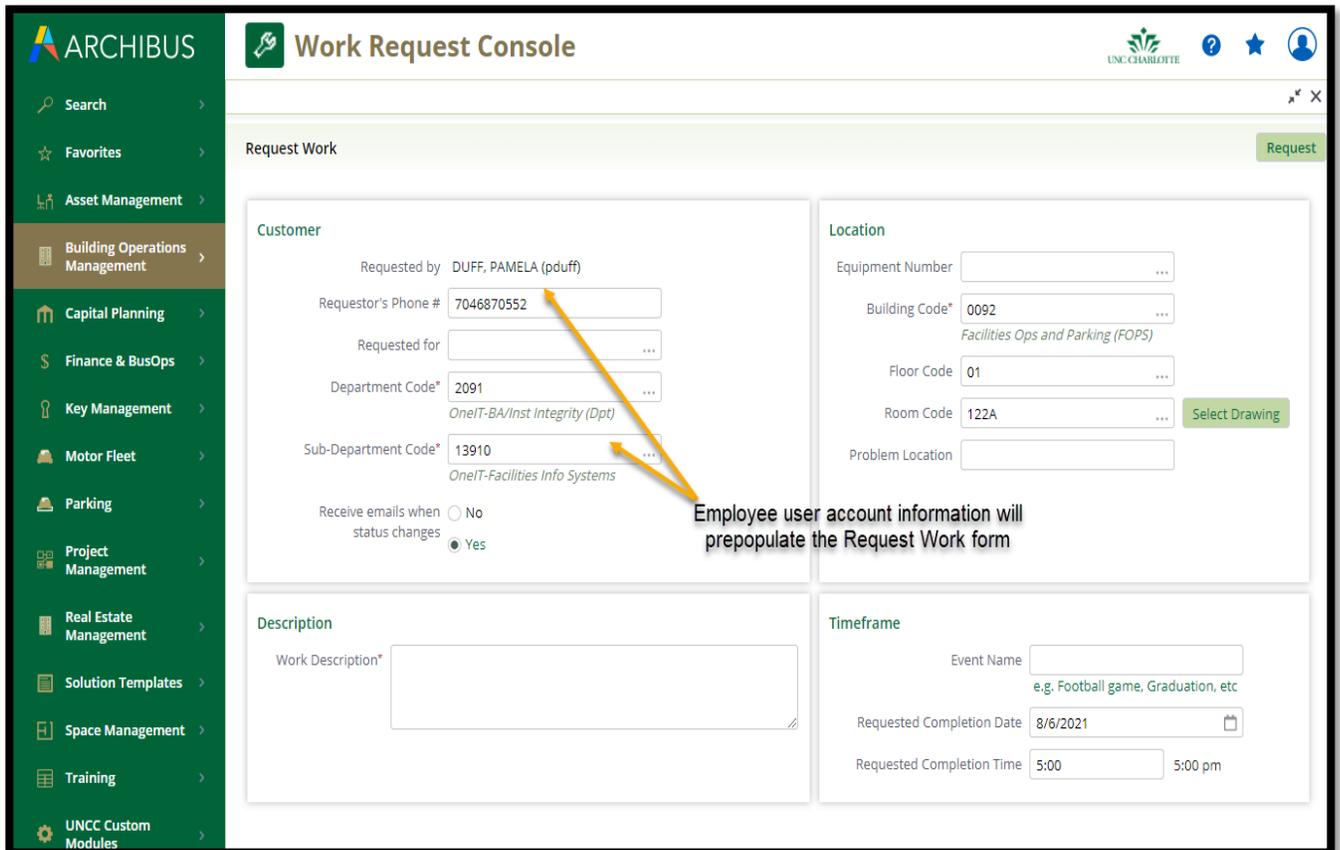
3. Work Request Console – Request Work Form

The Work Request Console view will display. Select **Request Work** action located in the upper right corner of the window.



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.



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.

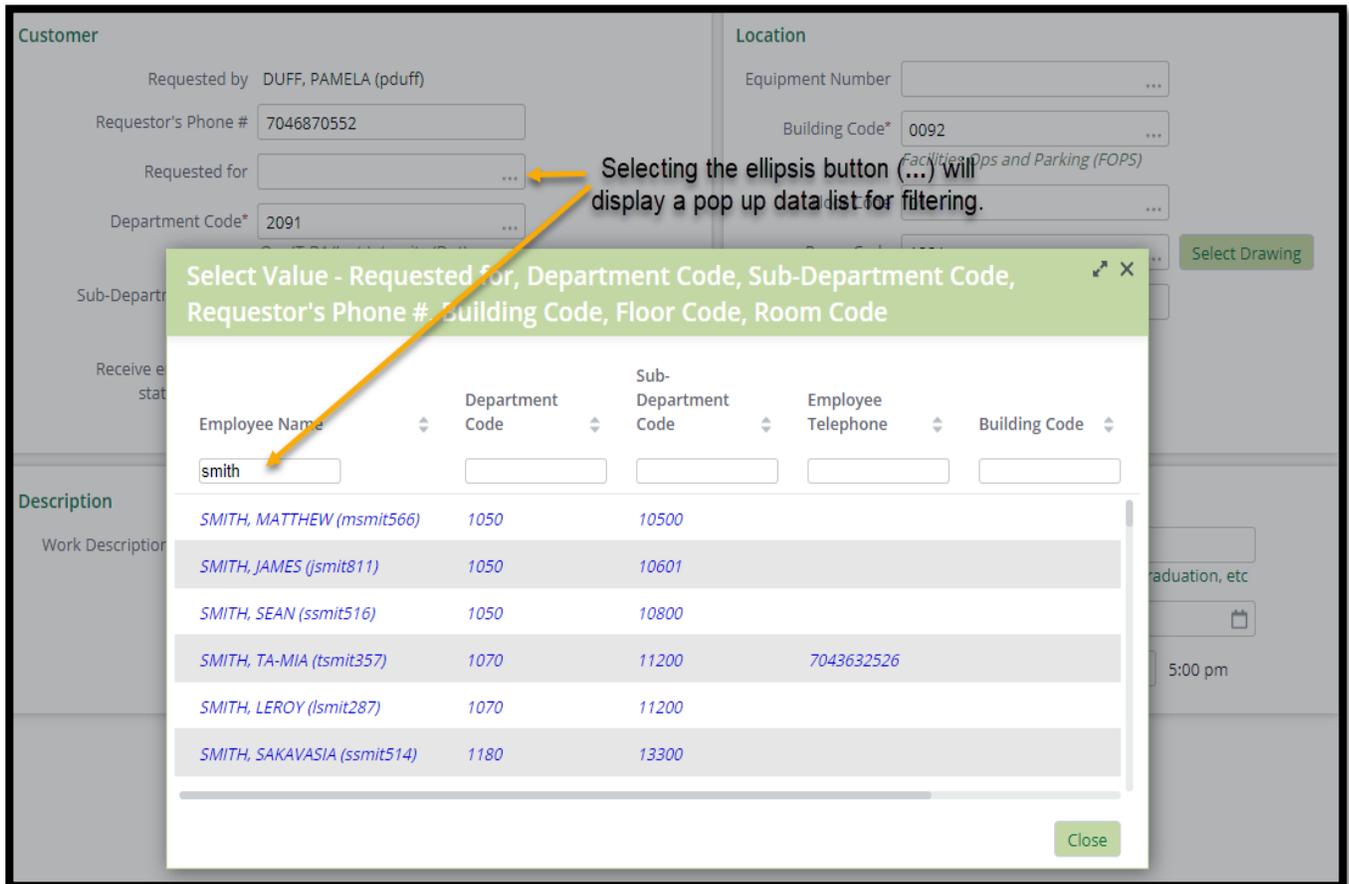
All fields indicated with a red asterisk (*) are required. In addition to the prepopulated required fields, these required fields include *Work Description* and *Building Code* (if not correctly populated with the needed building information for the specific request).



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.

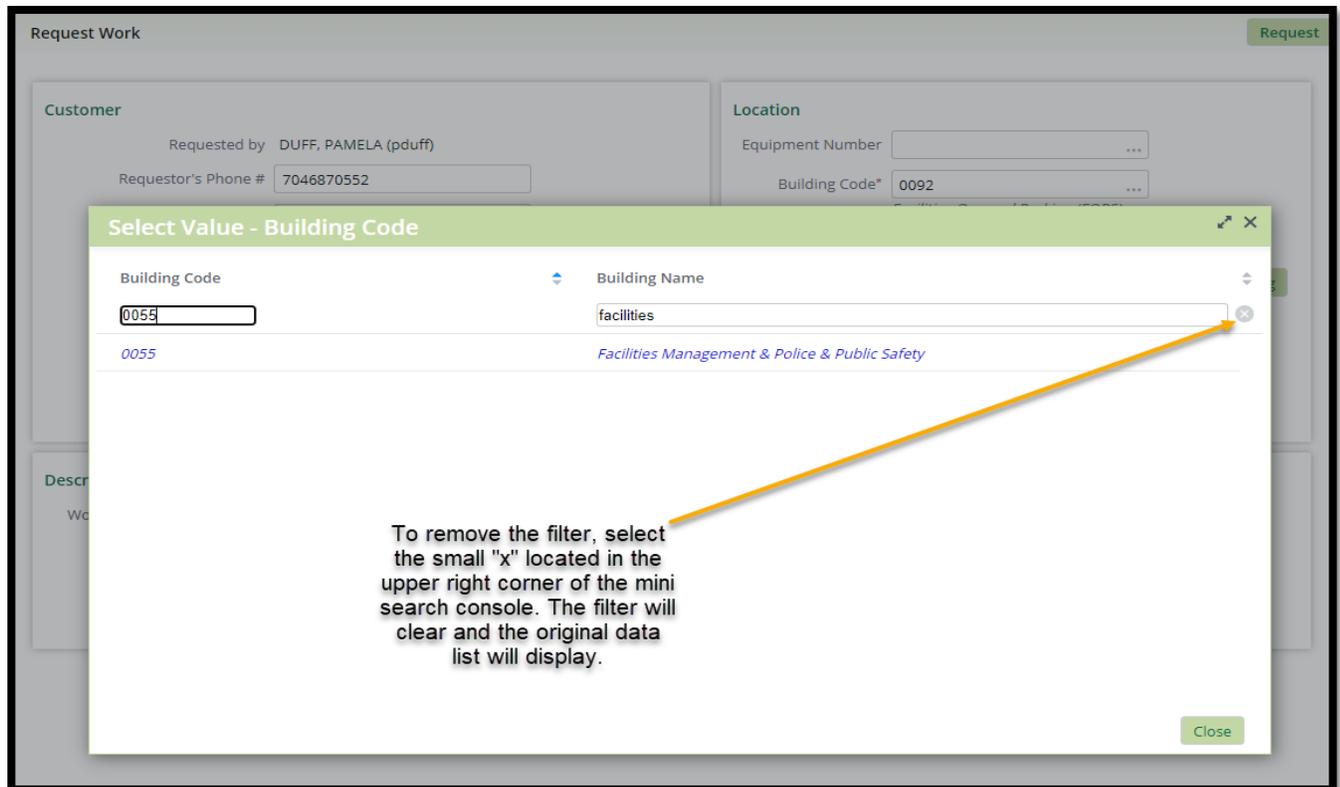
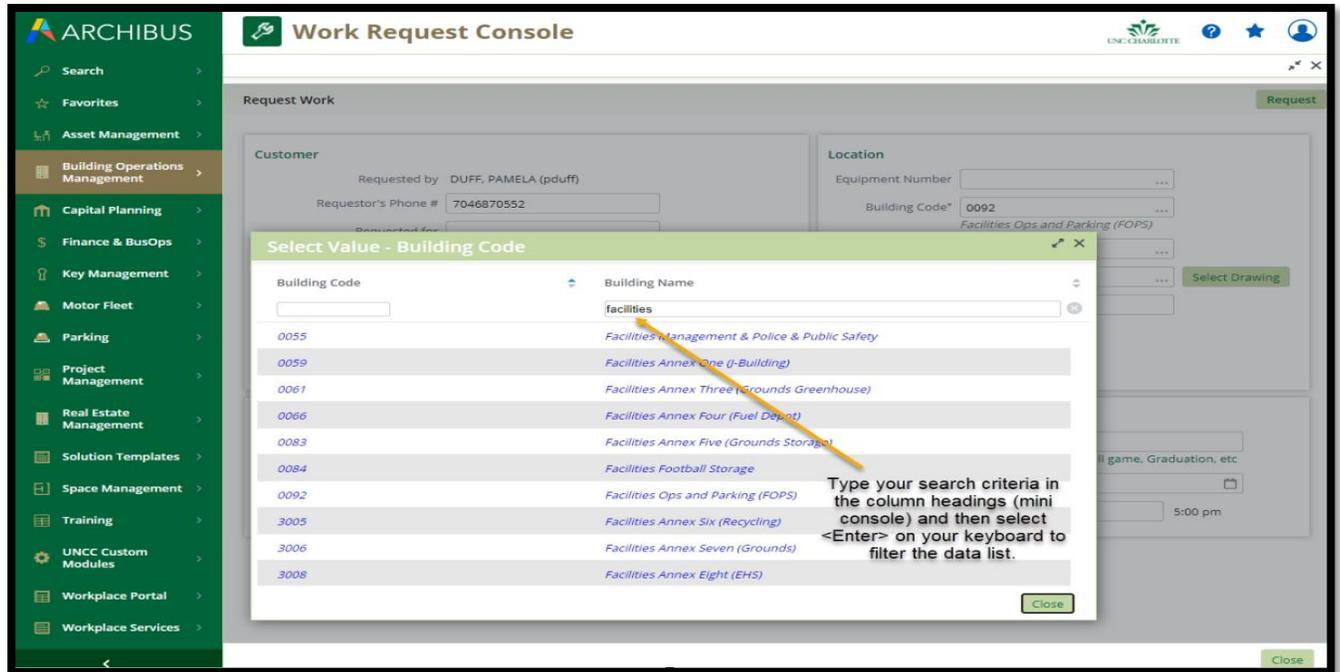


Selecting the ellipsis button (...) will display a pop up data list for filtering.

Employee Name	Department Code	Sub-Department Code	Employee Telephone	Building Code
smith				
SMITH, MATTHEW (msmit566)	1050	10500		
SMITH, JAMES (jsmit811)	1050	10601		
SMITH, SEAN (ssmit516)	1050	10800		
SMITH, TA-MIA (tsmit357)	1070	11200	7043632526	
SMITH, LEROY (lsmit287)	1070	11200		
SMITH, SAKAVASIA (ssmit514)	1180	13300		

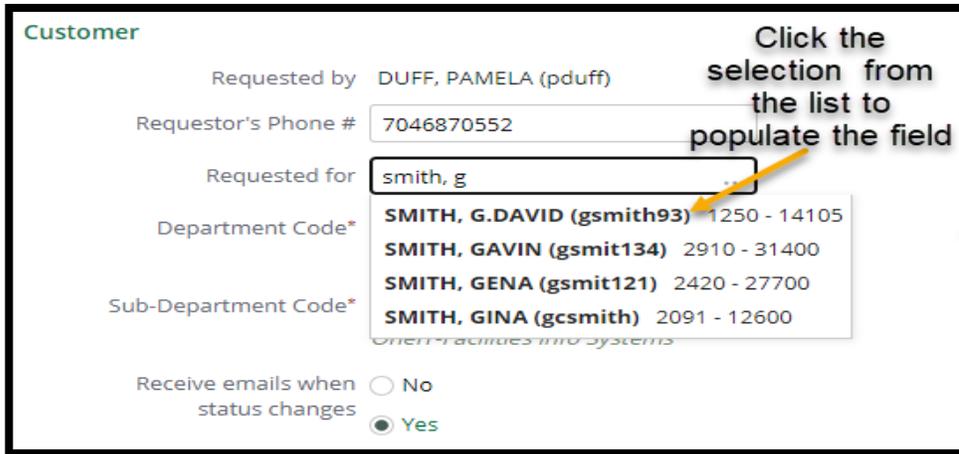
b. Filtering a Data List

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.

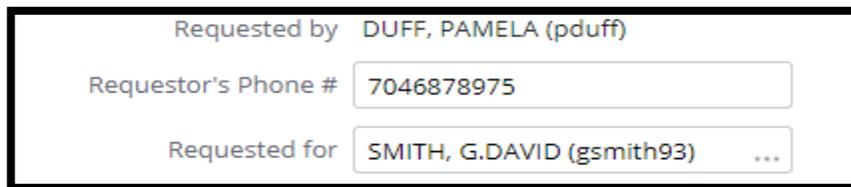


c. Auto Complete Fields

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.



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

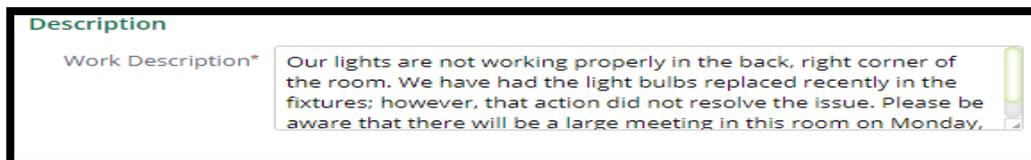


6. Completing the Request Work Form

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

- a. Equipment:** You do not need to fill in *Equipment Code* unless you know the equipment that is required to complete your work request.
- b. Work Description:** Before you submit your request, you will need to enter text into the work description field.

The *Work Description* should be detailed enough so that FM 311 will understand the problem and route the work accordingly to the correct Facilities Shop to complete your work request.



Enter as much information as you can about your work request, as well as any details that Facilities should be aware of (ex: construction, open wires, or classes, etc.). 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, Graduation, etc

Requested Completion Date 

Requested Completion Time 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 #

Requested for SMITH, G.DAVID (gsmith93) ...

Department Code* ...
 Maintenance and Operations (Dpt)

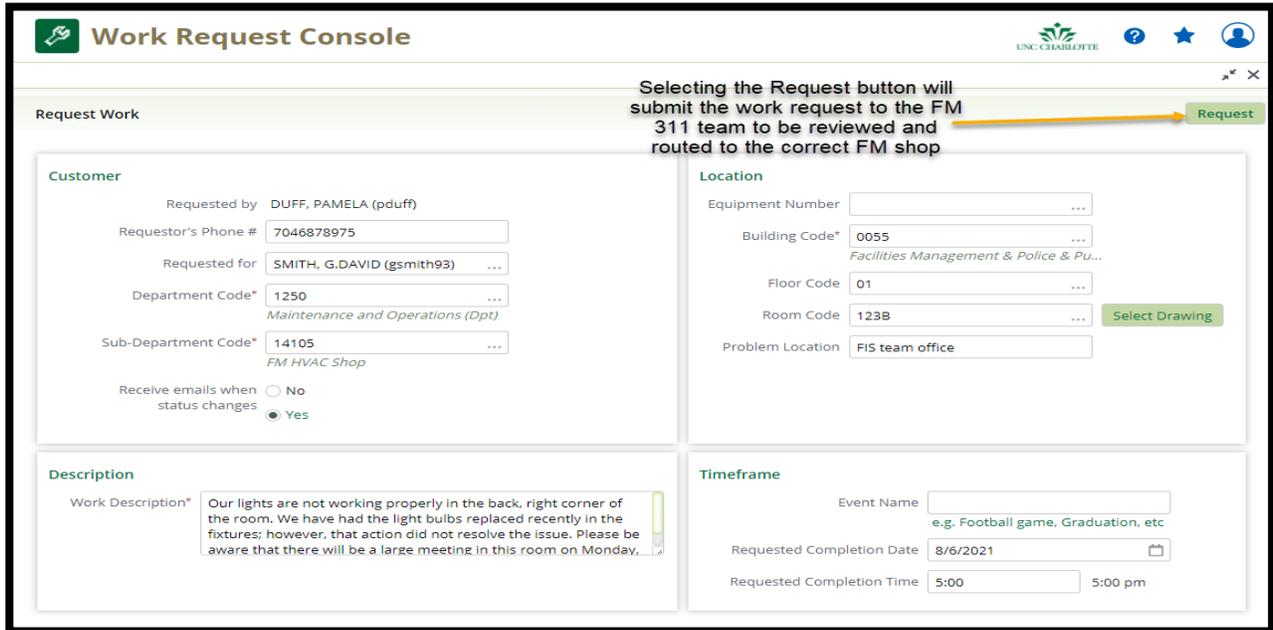
Sub-Department Code* ...
 FM HVAC Shop

Receive emails when status changes No Yes 

7. Submitting the Request Work Form

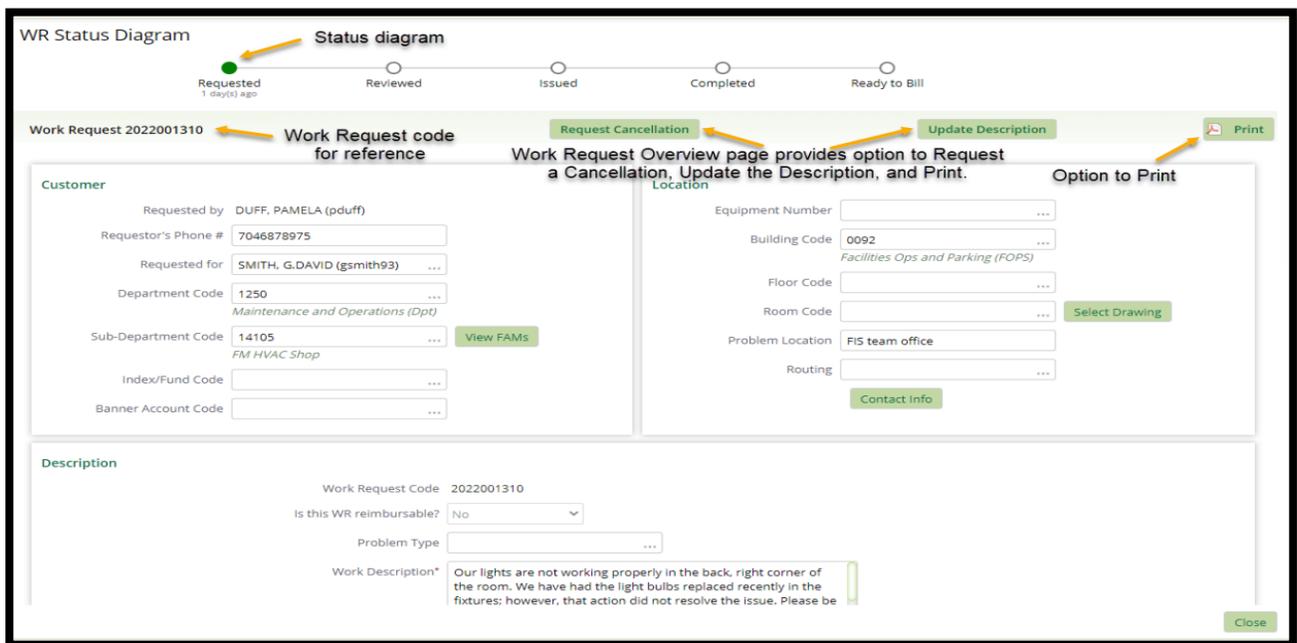
After you have filled out the form, remember to Review the Entire Work Request to verify everything was entered correctly.

Once you have completed and reviewed the form, click on the **Request** 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.



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.



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.