ARCHIBUS

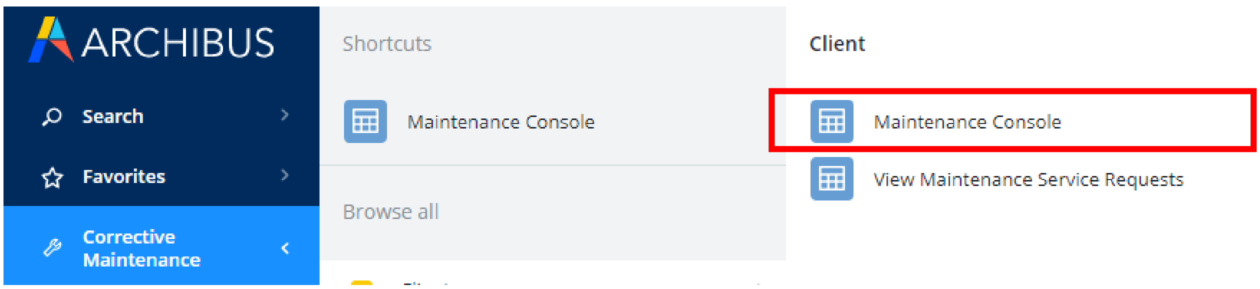
(Queen's Online Facilities Management Software)

Tracking Work Requests – Maintenance Console

This job aid is intended for Queen's faculty and staff who have a user account in Archibus and need to track all work requests created by them, or on their behalf, through the Maintenance Console.

Recommended browsers: Google Chrome (Preferred), Firefox, Safari

1) Log into **Archibus** using your Queen's Net ID and password.
2) Click on **Maintenance Console** in the left hand side menu.

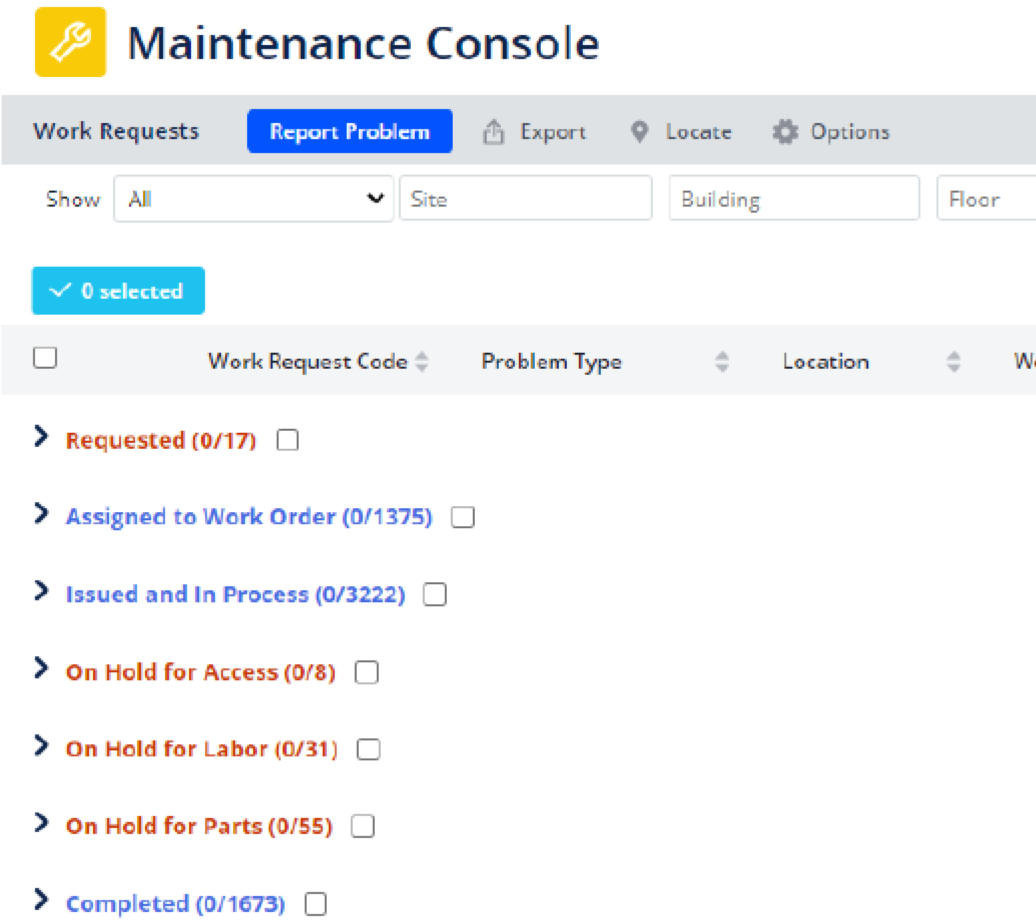


The **Maintenance Console** allows you to view and track all work requests where you are the Requestor. These work requests may have been created by you, or on your behalf (e.g. Fixit/FCC created a work request and assigned you as the Requestor after a problem was reported directly to them by someone in your building.)

Tracking Work Requests by Status

Scroll up and down (using the scroll bar on the right hand side of the screen) to view all of your work requests. Work requests will be divided in the **Maintenance Console** by their status:

- **Requested**: work request was just submitted and pending review and approval by Fixit/Facilities Control Centre (FCC - Residences);
- **Rejected**: work request has been returned to the Requestor for clarification;
- **Assigned to Work Order**: work request has been approved by Fixit/FCC and has moved on to work team for assignment, or self-assignment, to craftsperson(s);
- **Issued and In Process**: work request is assigned to craftsperson(s) and in process;
- **On Hold for Parts**: work request is on hold waiting availability of part(s);
- **On Hold for Labor**: work request is on hold waiting availability of craftsperson(s)/external contractor;
- **On Hold for Access**: work request is on hold until craftsperson(s) can access problem location;
- **Stopped**: work request has been stopped by Fixit/FCC;
- **Completed**: work request is completed.

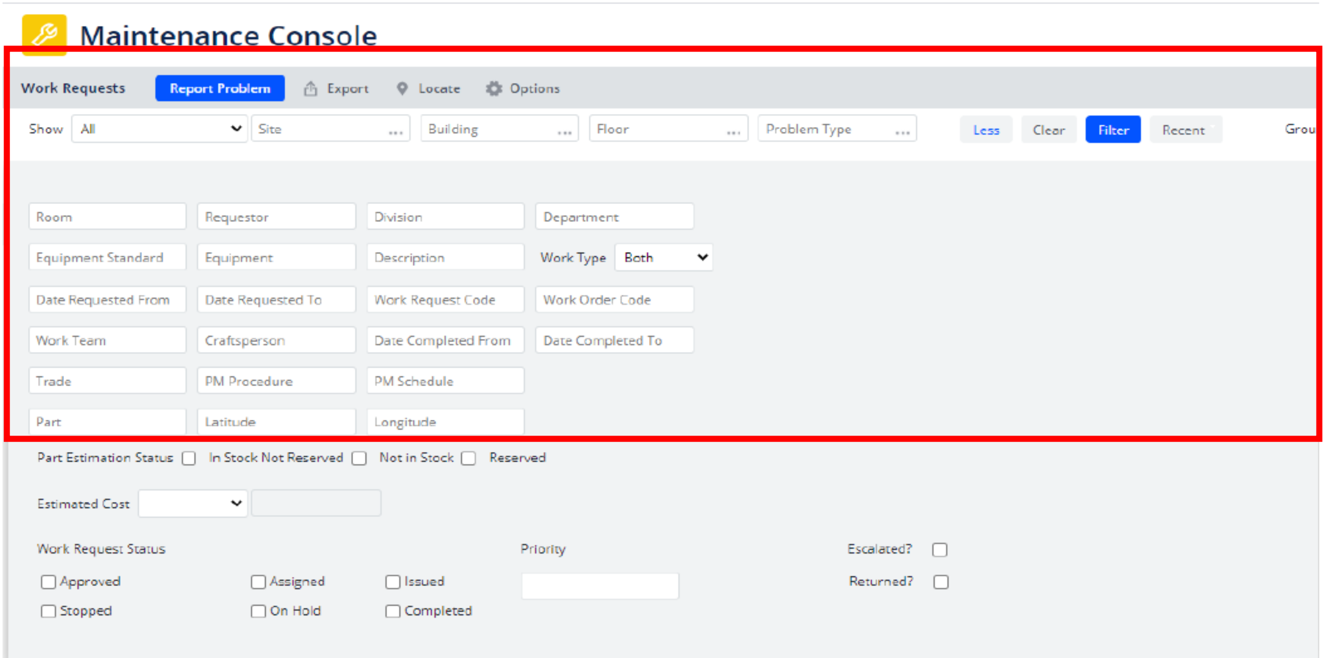


<u>Managing Your Work Requests</u>

The **Maintenance Console** has several features that allow you to manage your work requests.

1) Filtering Work Requests

At the top of the **Maintenance Console** you will find a series of filters that allow you to view your work requests based on a set of criteria of your choosing. Each filter can be used on its own or combined with other filters to further reduced your search results.



You can filter your work requests by **Site** (Main Campus, West Campus, etc.), **Building**, **Floor**, and/or **Problem Type**.

Filters can be entered manually, or selected from a menu by clicking on the lookup button available at the end of each filter field. When selecting filters from a menu, you have the ability to select more than one filter by checking the box on the left-hand side of the menu. For example, you could select more than one building to view all your work requests for a number of buildings.
Along with the search filters, you will find the additional features:

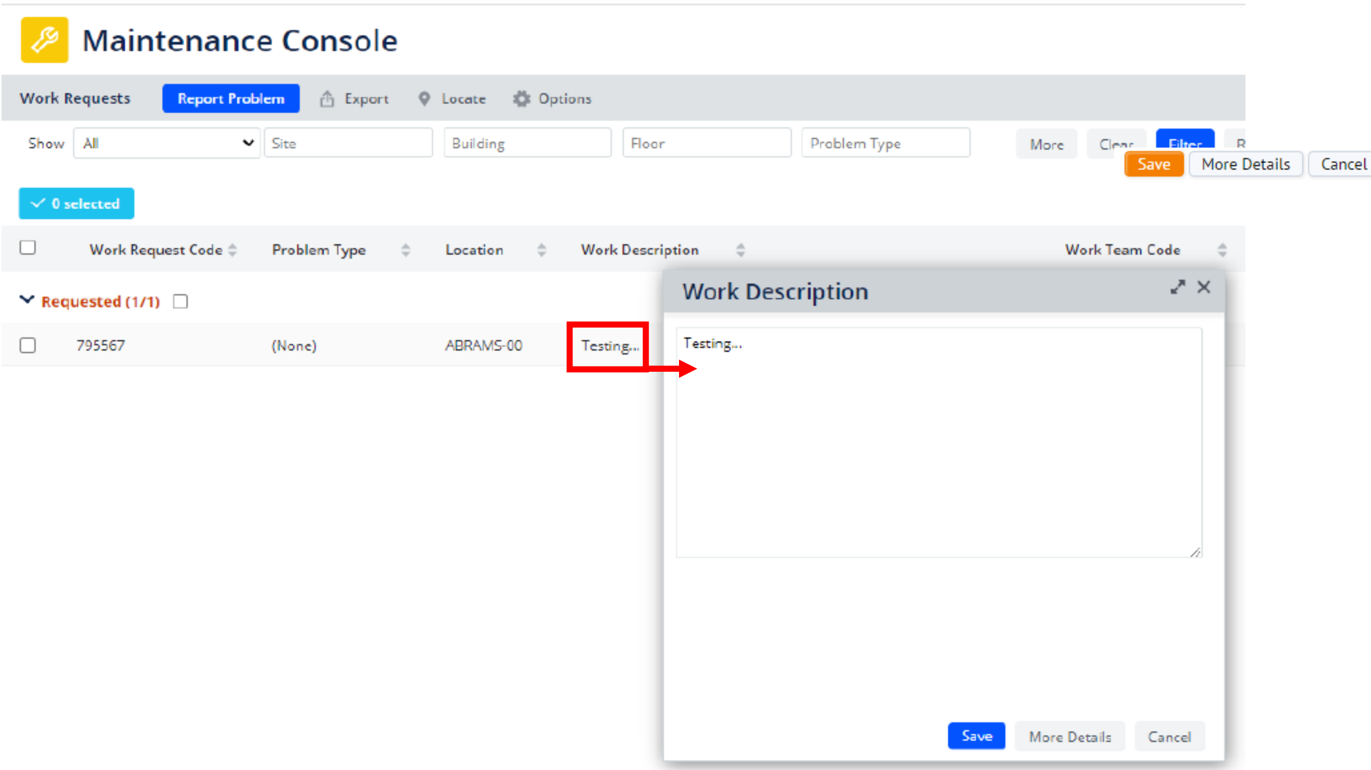
- **More**: allows you to perform a more advanced search by opening additional filters to further refine your results;
- **Clear**: click this button to clear all filters;
- **Filter**: click this button to see search results once you have selected all of your search criteria;
- **Recent**: this features saves your recent searches allowing you to quickly retrieve recent search results;
- **Group by Status**: this drop down menu allows you to display your work requests either by status or by problem type.

2) Viewing/Editing Work Requests

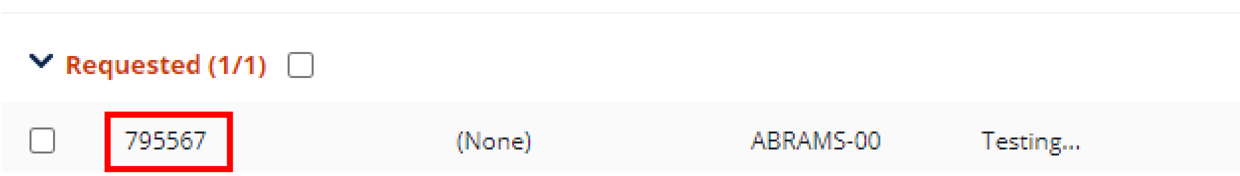
As a Requestor you have the ability to view details of your work requests at any point in the work flow. However, certain data fields will be available for editing when the work request is in the following status:

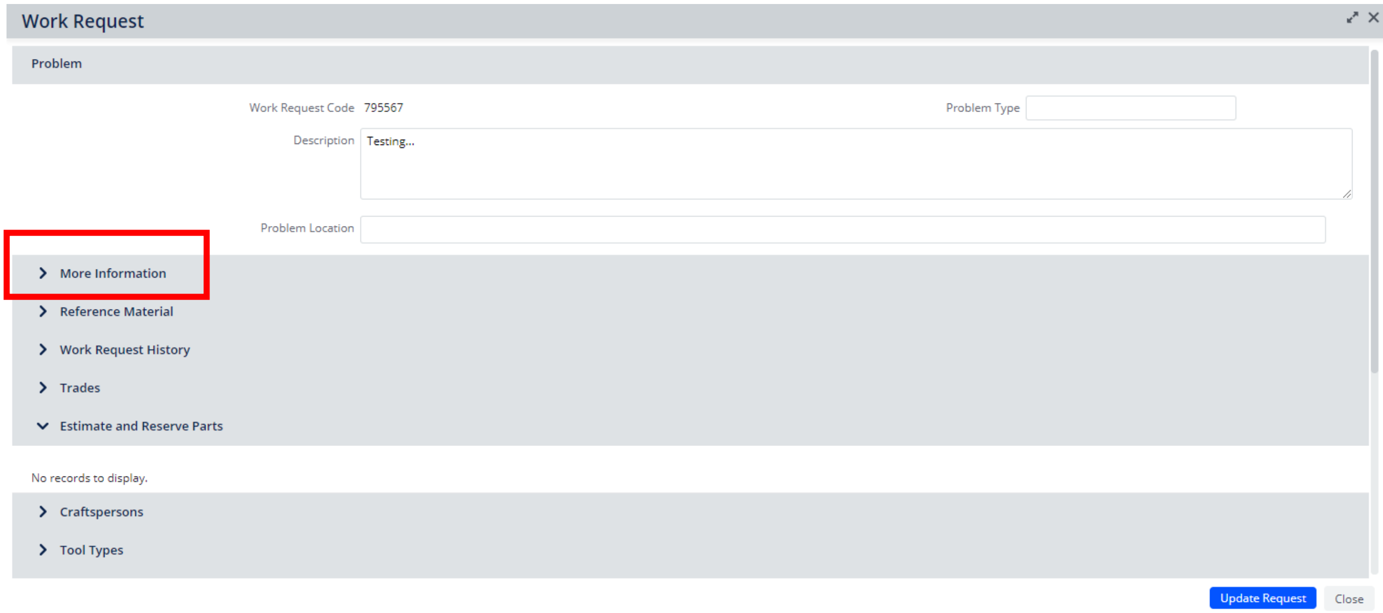
- **Requested**
- **Rejected**
- **Assigned to Work Order**

From the **Maintenance Console**, click directly on the **Work Description** of a work request to view and/or edit the information. The Work Description pop-up window will appear immediately.



Click on the **Work Request Code** to open up the **Work Request** form and view all the details of the work request.





The **Work Request** form contains the sections listed below. To expand a section, click on the arrow next its name. Click the orange **Update Request** button to save any changes made to the Work Request form.

- **Problem**: you may edit the **Description** and **Problem Location** when the work request is in the **Requested**, **Rejected** or **Assigned to Work Order** status;
- **More Information**: you may edit the billing data fields when the work request is in the **Requested** or **Rejected** status. You may also edit the contact data fields, delete/add attached documents when the work request is in the **Requested**, **Rejected** or **Assigned to Work Order** status;
- *Reference Material: (not currently used at Queen's)*
- **History**: lists all steps in the workflow, including pending steps;
- **Trades**: lists all trades (plumber, electrician, carpenter, etc.) assigned to the work request;
- **Parts**: lists all parts associated to the work requests;
- **Craftsperson**: lists all craftsperson(s) assigned to the work request;
- *Tool Types: (not currently used at Queen's)*
- *Tools: (not currently used at Queen's)*
- **Other Costs**: used to track invoices for outside contractors or job materials;
- **Estimated Costs**: estimates may be entered by a supervisor;
- **Actual Costs**: as entered by supervisor and/or craftsperson(s) once the work request is completed;
- **Update Work Request**: only visible once the work request is in the **Issued and In Process** status and beyond. Data in the section will be completed by craftsperson(s) or their supervisor.

3) Rejected Work Requests

Fixit/FCC may reject a work request if information is missing or inaccurate. For example, if a work request is determined to be billable, Fixit/FCC will reject it so that the requestor may edit the information provided.

These work requests will appear in your **Maintenance Console** under the status **Rejected**. To edit the work request, click on the **Update** action button.

Rejected (1/1)

☐	796489	(None)	GRANT	Event support	Update	Cancel

Click on the arrow by the header of the **History** section to review the history of the work request and the reason why it was rejected (look for comments made by Fixit/FCC.)

Work Request History

Step Responded By	On	Workflow Step	Status	Step Status After	Comments
FIXIT	10/12/2020 9:44 AM	Basic	Requested	None	
FIXIT	10/12/2020 9:44 AM	Edit and Approve	Requested	Rejected	Additional information required
FIXIT	Pending	Basic	Rejected	None	

Once you have updated the work request, click the **Submit** button at the bottom of the screen. Your changes will be saved and the work request will be back in the **Requested** status pending approval by Fixit/FCC.

4) Cancelling Work Requests

You have the ability to cancel your work requests when they are in the following status:

- **Requested**
- **Rejected**
- **Assigned to Work Order**

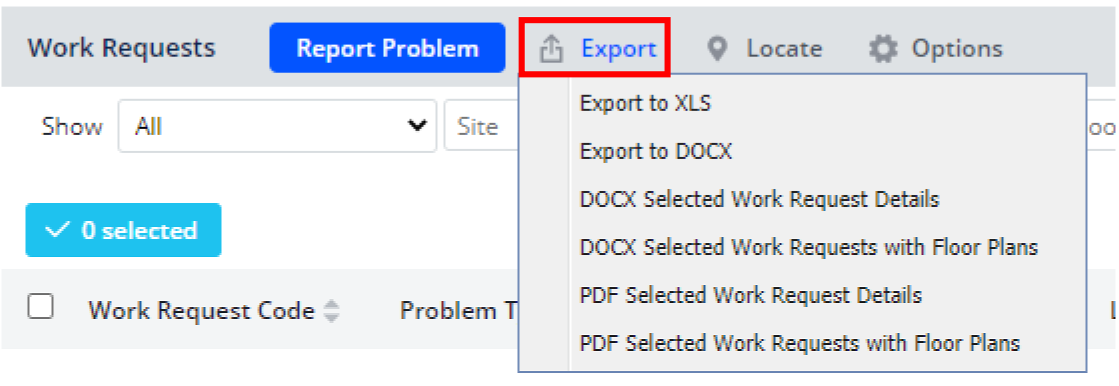
At every other status, you will need to contact Fixit or the FCC (if work request was submitted for a residence building) if you wish to cancel a work request.
To cancel a work request, simply click the **Cancel** action button in the **Maintenance Console**.

☐	Work Request Code	Problem Type	Location	Work Description				
Rejected (1/1) ☐								
☐	796490	(None)	GRANT	Event support	Update	Cancel		
Requested (1/1) ☐								
☐	796492	(None)	CHERNF	Testing	Cancel	Approve *		
Assigned to Work Order (1/1) ☐								
☐	796491	MAINT: NON-BILLABLE|ELECTRICAL-ALTERATIONS-REPAIRS	RIDEAU	Testing	Estimate	Schedule	Issue	Cancel

A dialog box will immediately pop up on your screen asking you to confirm your intent to cancel the work request. Click the orange **Yes** button to cancel the request, click **No** to leave the request in its current status.
IMPORTANT: a cancelled work request is immediately archived and cannot be re-opened.

5) Exporting Work Request Data

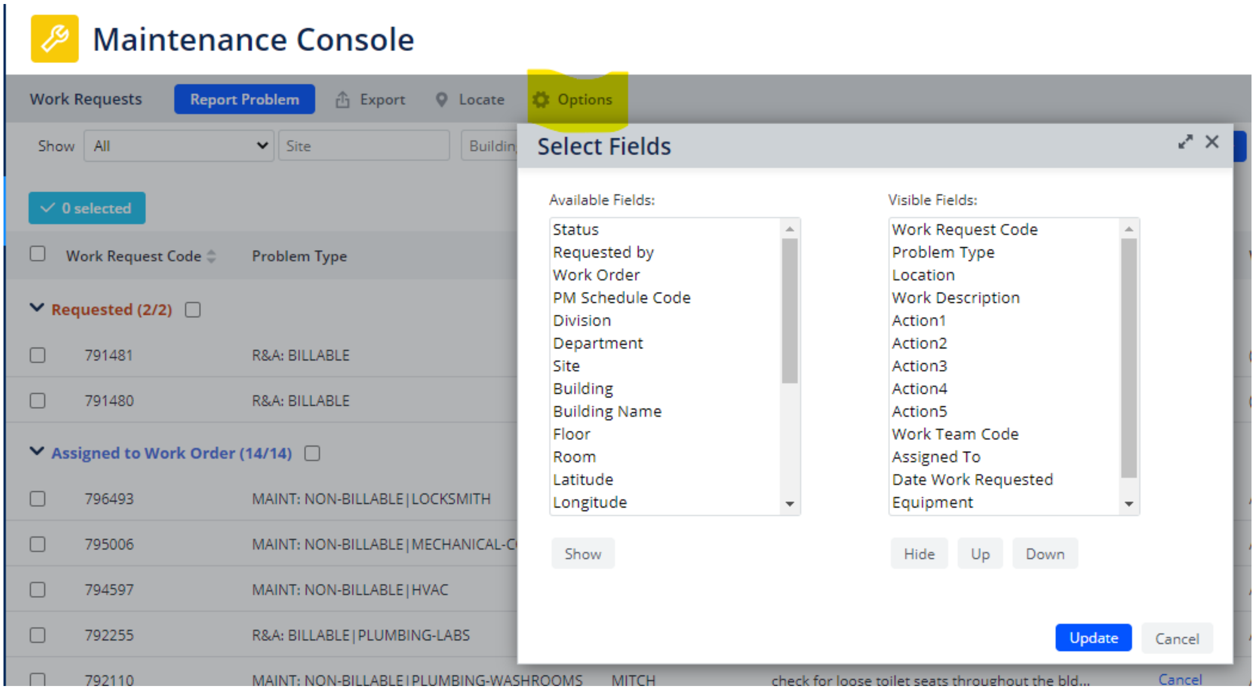
The arrow icon (next to the Report Problem button in the top right-hand corner of the screen) allows you to export all of your work requests to Excel or Word. It also allows you to export selected work requests to Word of PDF.



To export all of your work requests, click on the arrow icon and select wither **Export to XLS** (Excel) or **Export to DOCX** (Word) from the drop down menu. The exported file will contain the same amount of details visible in the **Maintenance Console**.

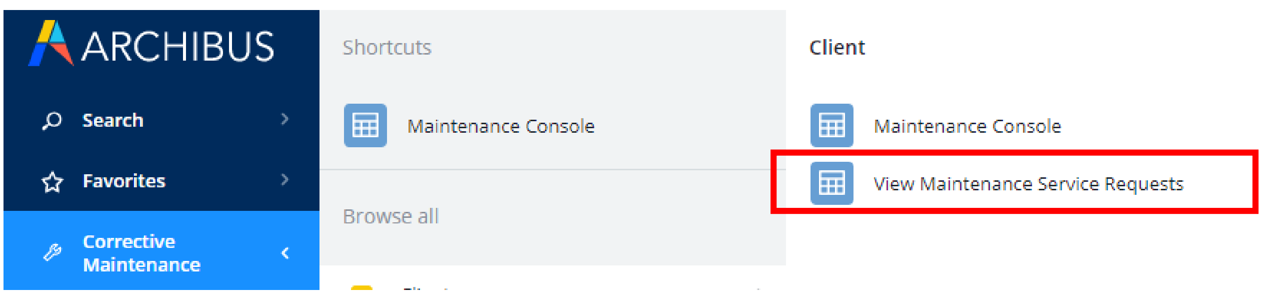
To export your work requests with details, checkmark which work requests you wish to export and select either **DOCX Selected Work Request Details** (or **DOCX Selected Work Request with Floor Plans**) or **PDF Selected Work Request** Details (or **PDF Selected Work Request with Floor Plans**) from the drop down menu.

To change fields available in the console, click on **Options** to **Select Fields.** Use Hide and Unhide buttons to change fields available on your screen.

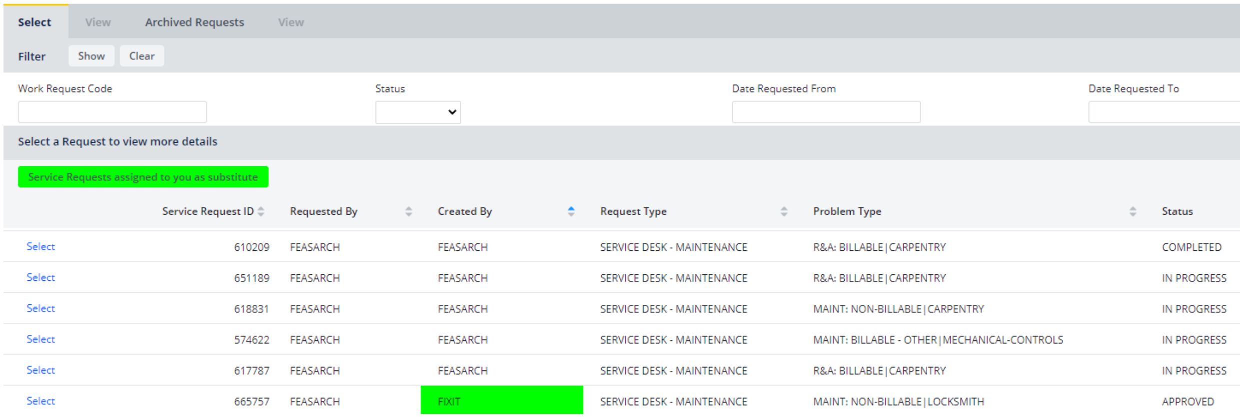


Viewing All Work Requests

To view all of your work requests, including the ones that have been archived (**Cancelled**, **Closed**), click on **View Maintenance Services Requests** in the left-hand side menu.



On the screen, you will see all of the work requests entered by you, or entered on your behalf by Fixit/FCC. You can distinguish between the two as the work requests entered on your behalf will be highlighted in green.



Select | View | Archived Requests | View

Filter | Show | Clear

Work Request Code | Status | Date Requested From | Date Requested To

Select a Request to view more details

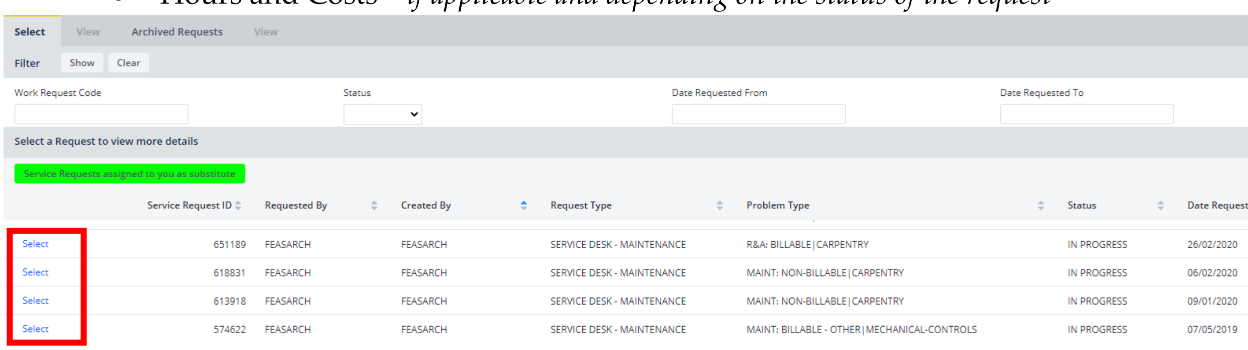
Service Requests assigned to you as substitute

	Service Request ID	Requested By	Created By	Request Type	Problem Type	Status
Select	610209	FEASARCH	FEASARCH	SERVICE DESK - MAINTENANCE	R&A: BILLABLE | CARPENTRY	COMPLETED
Select	651189	FEASARCH	FEASARCH	SERVICE DESK - MAINTENANCE	R&A: BILLABLE | CARPENTRY	IN PROGRESS
Select	618831	FEASARCH	FEASARCH	SERVICE DESK - MAINTENANCE	MAINT: NON-BILLABLE | CARPENTRY	IN PROGRESS
Select	574622	FEASARCH	FEASARCH	SERVICE DESK - MAINTENANCE	MAINT: BILLABLE - OTHER | MECHANICAL-CONTROLS	IN PROGRESS
Select	617787	FEASARCH	FEASARCH	SERVICE DESK - MAINTENANCE	R&A: BILLABLE | CARPENTRY	IN PROGRESS
Select	665757	FEASARCH	FIXIT	SERVICE DESK - MAINTENANCE	MAINT: NON-BILLABLE | LOCKSMITH	APPROVED

You may use the filters at the top of the screen to refine your view. Filters can be used on their own or in conjunction with one another. Once you've entered your filters, click the **Show** button to display the results. Click on the **Clear** button to delete the filters and return to the previous view.

To view the details of a particular work request, click on the **Select** action button on the left-hand side of the screen. You will see the following information displayed on the screen:

- Request
- Work Location
- Description
- Priority
- History
- Hours and Costs – *if applicable and depending on the status of the request*



Select | View | Archived Requests | View

Filter | Show | Clear

Work Request Code | Status | Date Requested From | Date Requested To

Select a Request to view more details

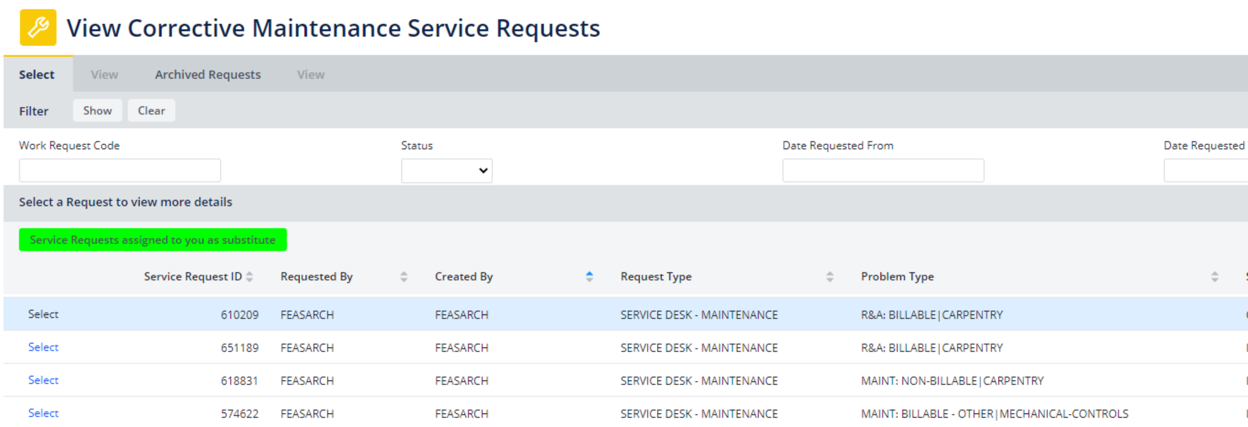
Service Requests assigned to you as substitute

	Service Request ID	Requested By	Created By	Request Type	Problem Type	Status	Date Requeste
Select	651189	FEASARCH	FEASARCH	SERVICE DESK - MAINTENANCE	R&A: BILLABLE | CARPENTRY	IN PROGRESS	26/02/2020
Select	618831	FEASARCH	FEASARCH	SERVICE DESK - MAINTENANCE	MAINT: NON-BILLABLE | CARPENTRY	IN PROGRESS	06/02/2020
Select	613918	FEASARCH	FEASARCH	SERVICE DESK - MAINTENANCE	MAINT: NON-BILLABLE | CARPENTRY	IN PROGRESS	09/01/2020
Select	574622	FEASARCH	FEASARCH	SERVICE DESK - MAINTENANCE	MAINT: BILLABLE - OTHER | MECHANICAL-CONTROLS	IN PROGRESS	07/05/2019

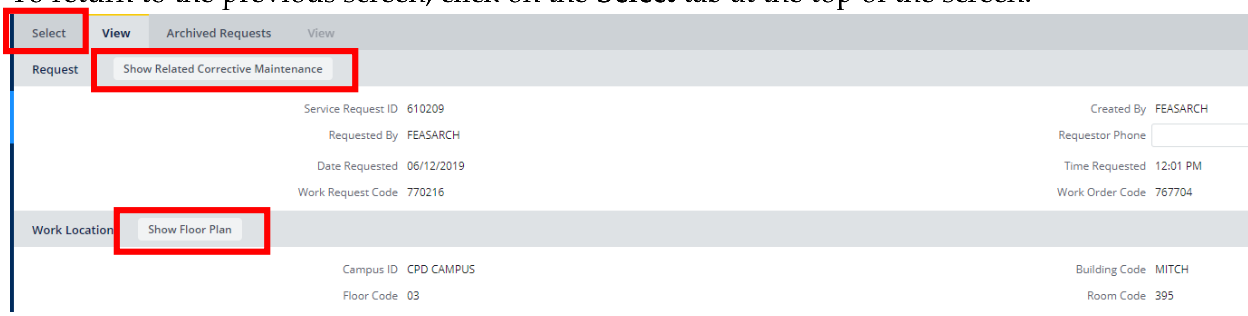
Click the **Show Related On Demand Work** button at the top of the screen to view additional details such as:

- Work Request Status
- Work Description

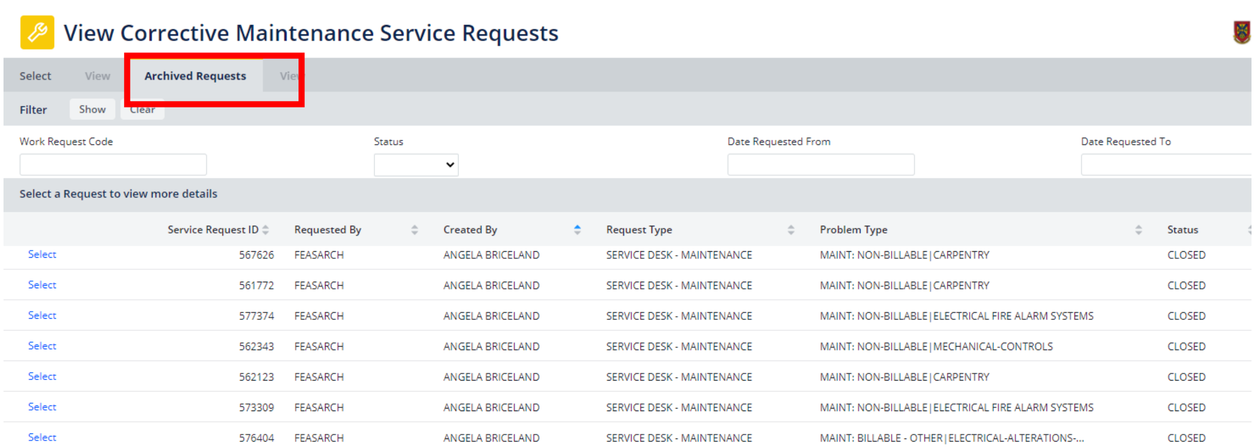
Click on the **Show Floor Plan** button to view the location of the problem reported on a floor map (location will be highlighted in yellow).



To return to the previous screen, click on the **Select** tab at the top of the screen.

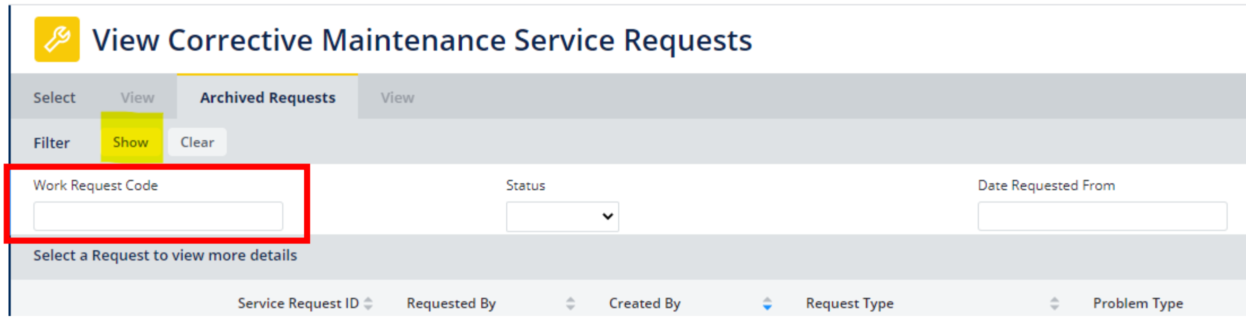


To view only your archived work requests, click on the **Archived Requests** tab at the top of the screen. Archived requests are work requests that have been **Cancelled** or **Closed** (work requests are closed by Fixit/FCC once the work request has been completed.)



In the **Archived Requests** tab, you have access to the same features as in the **Select** tab. The search filters allow you to refine your view, while the **Select** buttons allow you to view additional details for a particular archived work request.

To locate a charge posted to your General Ledger (GL), please use the **Archived Requests** tab to search on the work request code referenced in your GL line item line. Enter this information into **Work Request Code** field and then click on **Show**.



ARCHIBUS

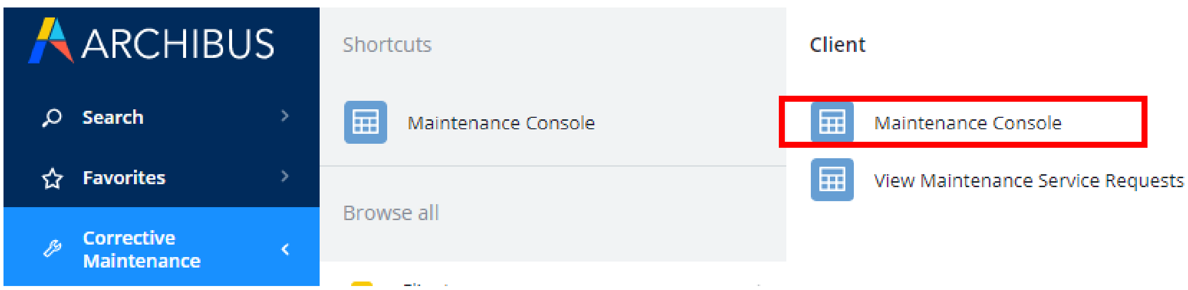
(Queen's Online Facilities Management Software)

Creating Work Requests

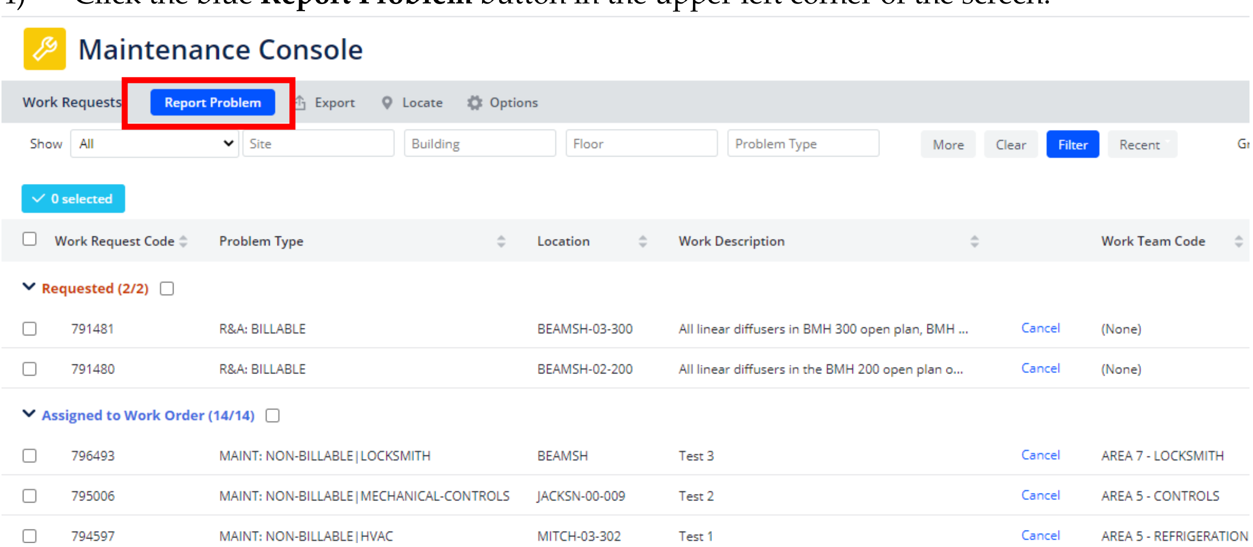
This job aid is intended for Queen's faculty and staff who have a user account in Archibus. Follow the steps outlined below to report an issue to Fixit (Physical Plant Services) or the Facilities Control Centre (FCC - Residences).

Recommended browsers: Google Chrome (Preferred), Firefox, Safari

1) Log into **Archibus** using your Queen's Net ID and password.
2) Click on **Maintenance Console** in the left hand side menu.



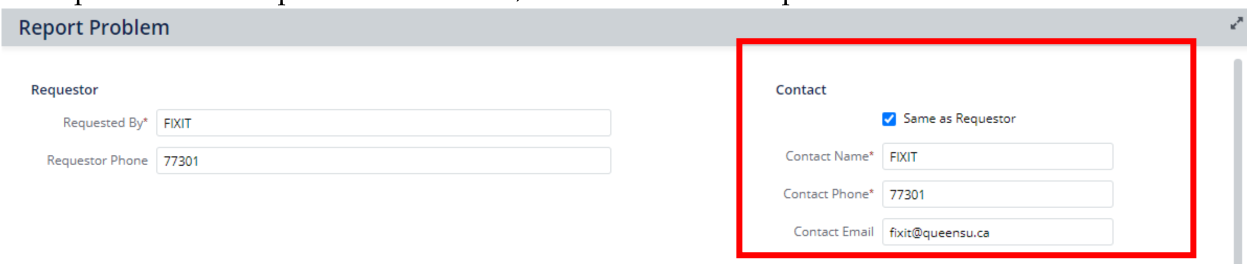
3) The **Maintenance Console** allows you to view and track all work requests where you are the Requestor. Scroll through the console and double check that the problem hasn't already been reported.
4) Click the blue **Report Problem** button in the upper left corner of the screen.



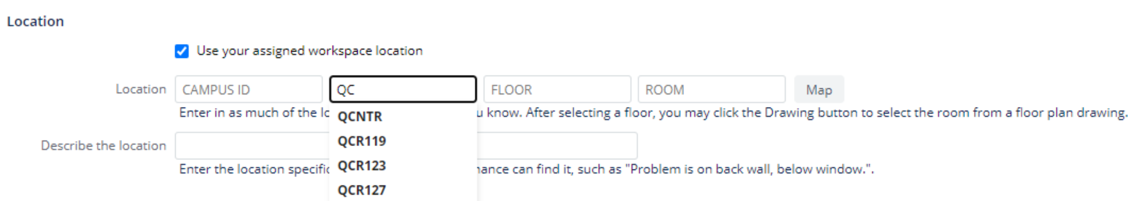
5) Complete the **Report Problem** form making sure that all required data fields – the ones with a red asterisks (*) contain data.

6) The **Requestor** section will be pre-populated with your data (name and phone number). **IMPORTANT**: Please do not modify this information. If you are not listed as the Requestor, you will not be able to track the progress of your work request.

7) In the **Contact** section, please enter the name and contact information of the person who occupies the space where the problem is located, if different from requestor.



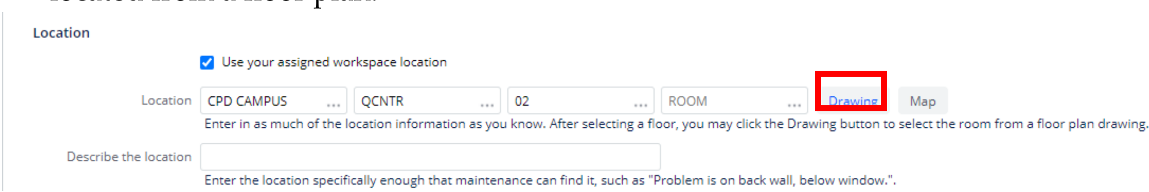
8) Select the **Location**. Type the first letter of the building in the **Building** data field. You will see a drop down menu appear with a list of all building codes that begin with that letter, you may select your building from that list. If you are unsure of your building code, click the lookup button (ellipses available at the end of each data field) to select from a menu.



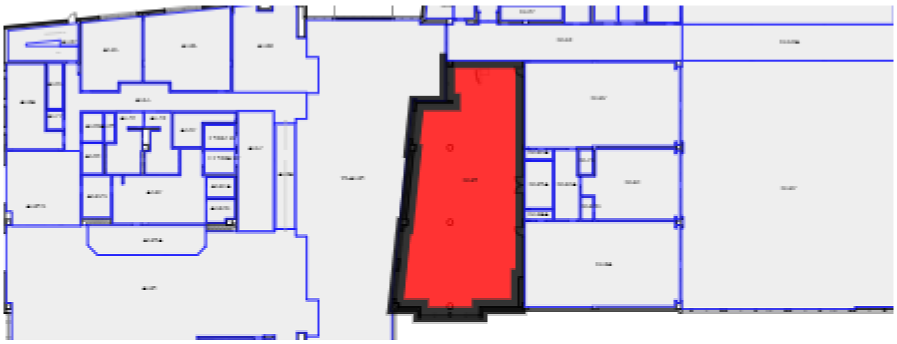
IMPORTANT: depending on your Archibus user account, you may be limited to entering work requests for certain buildings. Residence staff are allowed to enter work requests for common spaces, they are NOT allowed to enter any work requests for bed spaces.

9) Next, enter the **Floor** where the problem is located. You may either enter the data manually into the data field or click the lookup button to select the floor from a menu.

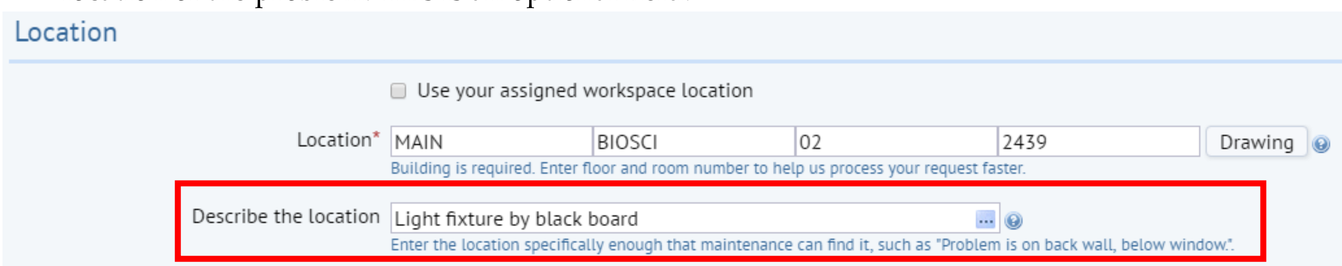
10) Once you have entered the **Building** and **Floor** data, you will see the **Drawing** button appear at the of the row, next to the **Room** data field. Please click this button to select the room where the problem is located from a floor plan.



Use the plus (+) and minus (-) signs in the top right corner of the floor plan to zoom in and out. Click once, right on the room number to select the room. The **Room** field will immediately be populated with the room number selected on the floor plan.



11) Use the **Describe the location field** to add instruction that will help PPS/Residence staff find the exact location of the problem. This is an optional field.



Location

Use your assigned workspace location

Location* MAIN | BIOSCI | 02 | 2439 | Drawing

Building is required. Enter floor and room number to help us process your request faster.

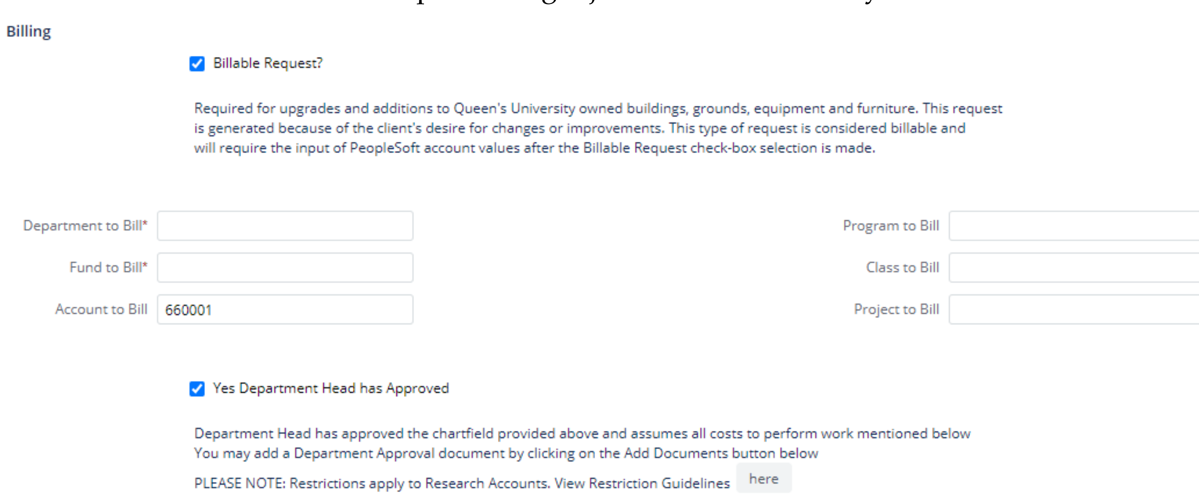
Describe the location: Light fixture by black board

Enter the location specifically enough that maintenance can find it, such as "Problem is on back wall, below window."

Billable Work Requests

If the work request is considered billable, please follow steps 12-14 to complete the **Billing** section. If the work request is not billable, skip to step 15.

12) If the work request is considered billable, check the **Billable Request** checkbox.
13) The **Account to Bill** field will be pre-populated. Make sure that you complete all other required data fields in the **Billing** section.
14) If the work request is billable, you must check the **Department Head Has Approved** box. Failing to do so will result in the work request being rejected and cause delays.



Billing

Billable Request?

Required for upgrades and additions to Queen's University owned buildings, grounds, equipment and furniture. This request is generated because of the client's desire for changes or improvements. This type of request is considered billable and will require the input of PeopleSoft account values after the Billable Request check-box selection is made.

Department to Bill*

Fund to Bill*

Account to Bill 660001

Program to Bill

Class to Bill

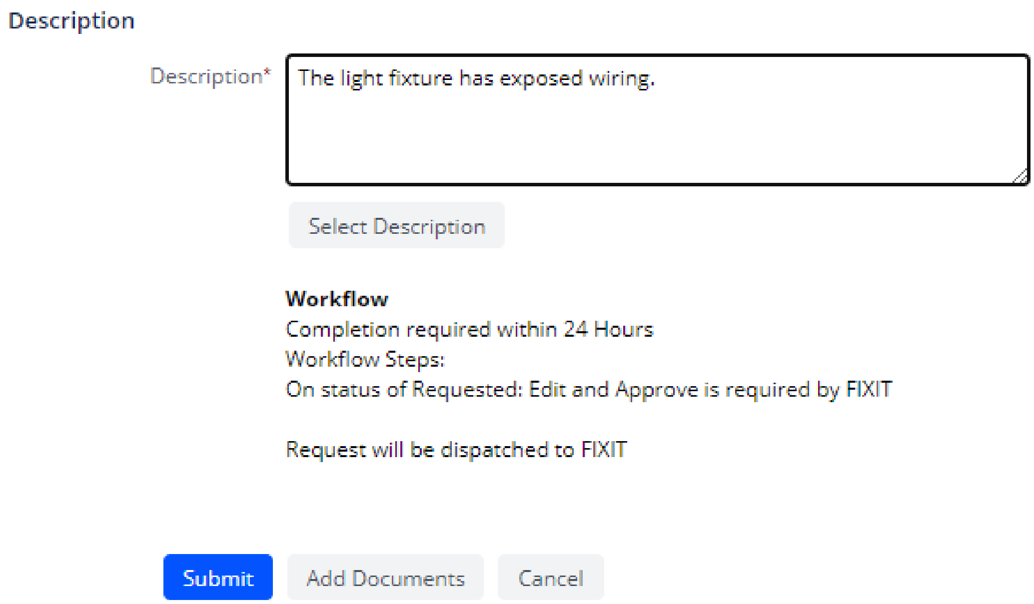
Project to Bill

Yes Department Head has Approved

Department Head has approved the chartfield provided above and assumes all costs to perform work mentioned below
You may add a Department Approval document by clicking on the Add Documents button below

PLEASE NOTE: Restrictions apply to Research Accounts. View Restriction Guidelines here

15) The last section of the Work Request form is the **Description**. Type your problem description directly into the textbox. Please do not click the **Select Description** button to select from a menu.

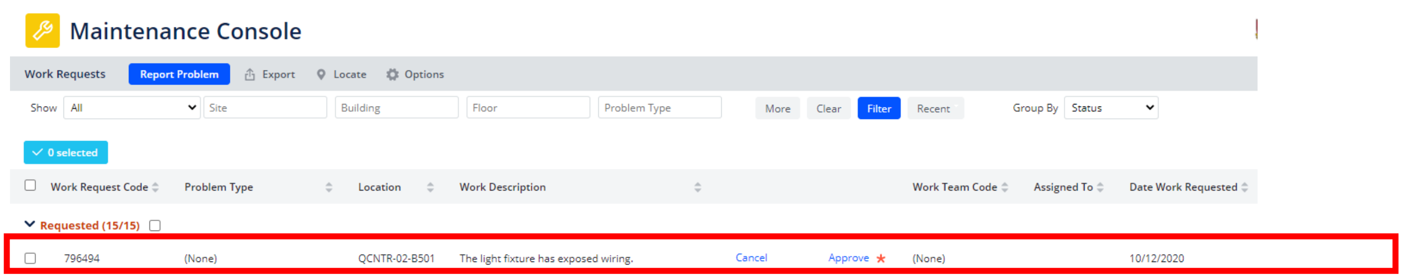


Submitting your Work Request

At the bottom of the form, you will find three buttons (see screenshot above):

- **Submit**: click to submit your work request
- **Add Documents**: click to attach document(s) to your work request
- **Cancel**: click to cancel your work request

16) Click the blue **Submit** button at the bottom of the form to submit your work request. You will see a pop-up window confirming that your work request has been created and given a work request code number.
17) Click **OK** on the pop-up window. You are now back at the **Maintenance Console**, your newly submitted work request will be at the top of the screen under the **Requested** section.



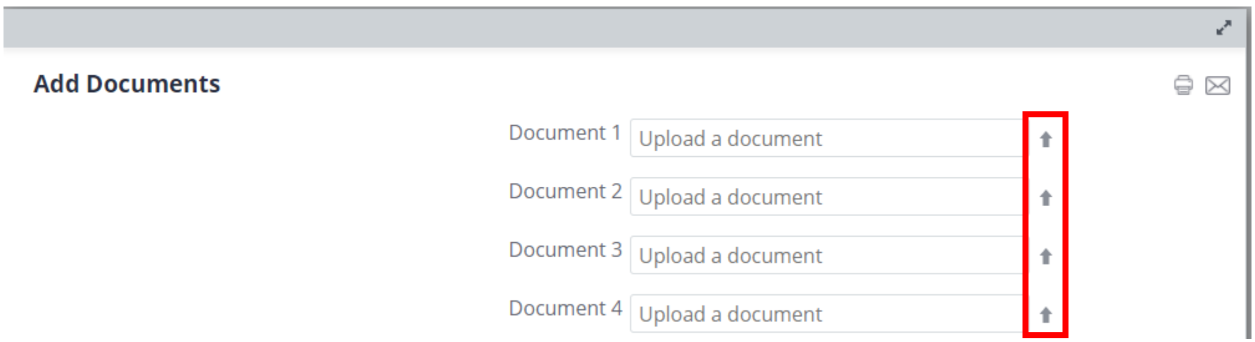
Attaching a Document to your Work Request

Archibus allows you to add documents such as pictures (JPG or PNG format), or other documents (PDF, Word, Excel, text files (saved email) to your work request.

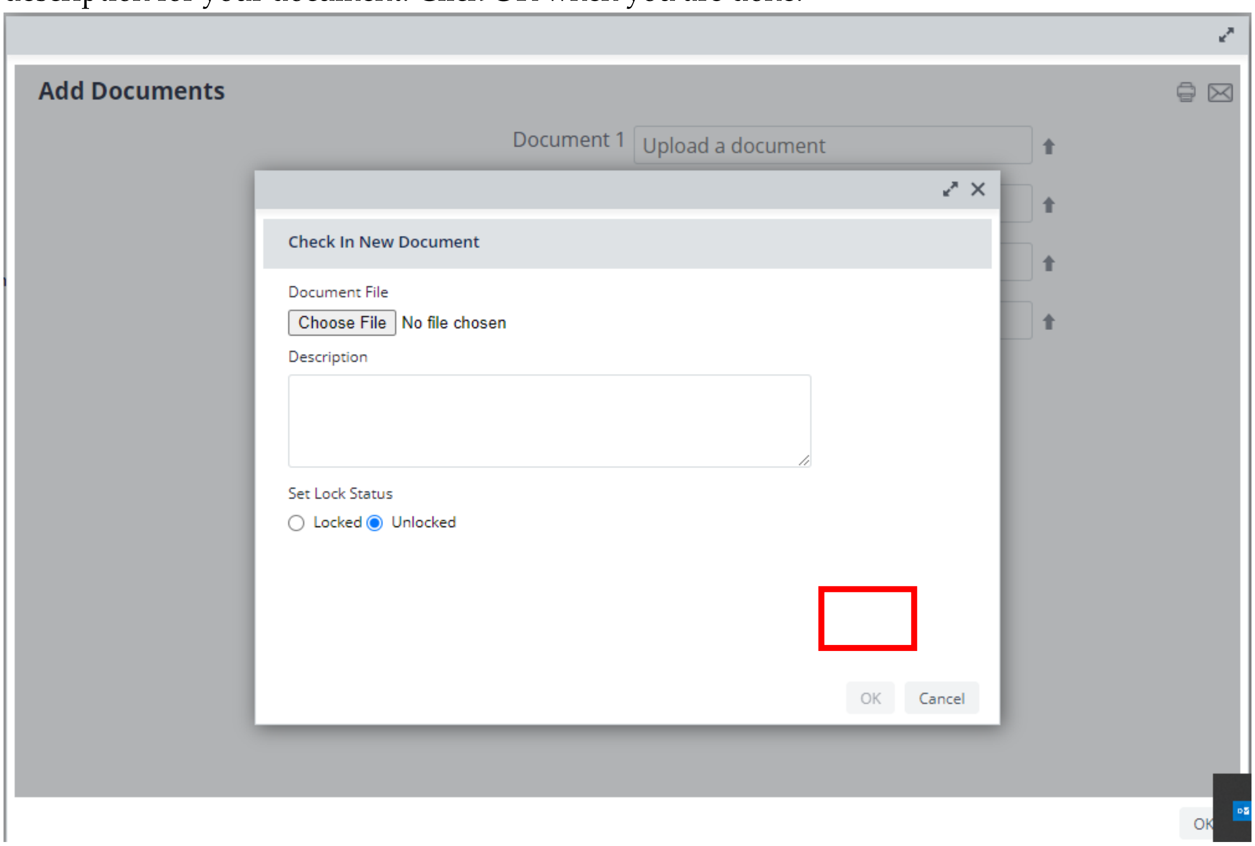
18) Click the **Add Documents** button at the bottom of the work request form. You will first see a pop-up window confirming that your work request has been created and given a work request code. Click **OK** on the pop-up window to proceed with attaching documents.

<u>**IMPORTANT**</u>: <u>clicking the **Add Documents** button will automatically submit your work request. Review your work request and make sure that it is ready to submit before attaching documents to it.</u>

19) You may attach up to four documents to your work request. Click the blue arrow at the end of each field to upload a document.



20) Click **Choose File** to select the file your wish to attach. You may use the **Description** textbox to add a description for your document. Click **OK** when you are done.



21) Click **OK** on the **Add Documents** screen when you are done attaching your documents. You are now back at the **Maintenance Console**.