

# User Guide

Web Central v23

ATL/Supervisor Reviewing A Team Work Request List, Assigning To A Craftsperson, And Completing A Work Request

### Foreword

This User Guide document has been designed for the purpose of training relevant members of staff within the Estates Department.

### System Support

If you require assistance, please contact <u>ebisusers@ed.ac.uk</u> in the first instance. All urgent requests should be directed to the EBIS Users Support Desk on 0131 650 9683.

More information on the EBIS Project is available at:

www.ed.ac.uk/estates/what-we-do/ebis

### Logging on to Web Central

Login to the following URL using your EASE user name and password:

www.webcentral.estates.ed.ac.uk/archibus/login.axvw

This will open Web Central Application showing access you have been set up with.

#### Estates Helpdesk

The Estates Helpdesk is open 8am – 6pm during each business day, with Security dealing with emergencies out with these times. Contact details are as follows, telephone 0131 650 2494 or by email <u>estates.helpdesk@ed.ac.uk</u>

#### Accessibility

If you require this document in an alternative format, please contact <u>estates.helpdesk@ed.ac.uk</u> or telephone 0131 650 2494.

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#### **Document Version Control**

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			1.9 New section on Adding Parts
			Various screenshots updated
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			Numbering and contents table updated

#### 1.0 Reviewing a Team Work Request List and Assigning To a Craftsperson

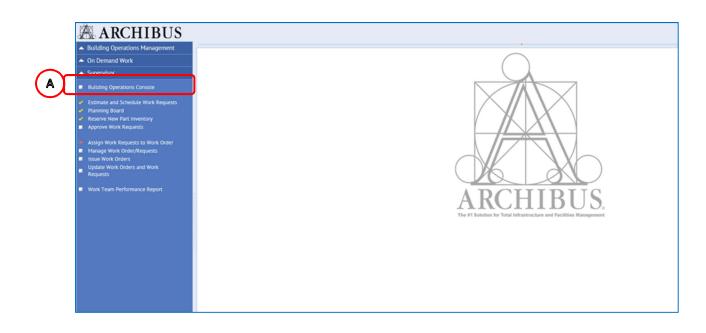
#### 1.1. Purpose

This user guide is for Area Team Leaders and Supervisors and shows the different steps needed to complete the following activities:

- Access the Building Operations Console to view Work Requests assigned to a specific work team queue
- Reviewing a Work Request
- Forwarding to another work team queue
- Assigning to a craftsperson(s)
- Completing a Work Request
- Cancelling a Work Request

#### 1.2. Accessing the Building Operations Console

After logging onto the WebCentral system, you will see the following screen, select the **(A) Building Operations Console** option



When you see the following screen, check the filters applied and then select the **(B) Filter** option.

ARCHIBUS		ATL01 • Find a form or report	Sign Out	Help
<ul> <li>Building Operations Management</li> </ul>	Building Operations Console		04	88A
<ul> <li>On Demand Work</li> </ul>	$\sim$	Report Problem	R . 0	. 0
<ul> <li>Supervisor</li> </ul>	Shore 200 Newest Requests v building Foor Room Protein Type			-
Building Operations Console	Shaw         Shaw         Problem Type         More         Recent +         Group By (Status ->			
Estimate and Schedule Work Requests     Planning Board     Reserve New Part Inventory     Approve Work Requests				
Assign Work Requests to Work Order     Manage Work Order/Requests				
Issue Work Orders     Update Work Orders and Work     Requests				
<ul> <li>Work Team Performance Report</li> </ul>				

(See **Appx A** to review the filters and column setup for the Building Operations Console page)

This screen is broken down into sections based on the Work Request life cycle.

(See Appx B to understand the lifecycle of a Work Request)

The page will load with the status bands collapsed, but indicating how many requests are in each band (number loaded/number in section).

Building Operations Console								040
							Report Problem 🕑	• *
Show 200 Newest Requests  Site	Building	Floor	••• Problem Type	More Clear Filte	Recent •	Group By Status	*	
0 selected Building Name	Work Request Code Problem Type		<ul> <li>Location — Work Description</li> </ul>	Work Team Code Assigned To	<ul> <li>Due Date</li> </ul>	No. cf = Repair Type =		
Requested (0/1)								
Assigned to Work Order (0/8	) 🛛							
Issued and In Process (168/1	.68) 🗉							
Completed (0/23)								

The following options will help to view the page:

The **(C) Expand/ collapse** triangle to the left of the titles to hide or show information by work status. Please note

The (D) Navigation slider to the right of the screen to scroll up and down the page

O selected     Building Name	Work Request Code	Problem Type	Location	<ul> <li>Work Description</li> </ul>	Work Team Code	e 🕳 Assigned To	Due Date No. cf H	Repair Type 🕳		_
► Requested (0/1) □										
Assigned to Work Order (0/8)										
▼ ssued and In Process (168/1	.68) 🗆									L. L
HOLYROOD CAMPUS GENERAL	1196053	ELECTRICALILIGHTING	550	test of return	HELPDESK	GARY GRAHAM	29/09/2017 1	Hold	Update	Complete
OLD COLLEGE	1196051	ELECTRICAL EMERGENCY LIGHTING	11-B.65	rerrererer	HELPDESK	NEIL THOMPSON	28/09/2017 2	Hold	Update	Complete
EDWARD SALVESON HALL	1196041	PLUMBINGWATER	861-06	TEST3 EM	MS_HOLYROOD	ALAN ANDERSON	20/09/2017 2	Hold	Update	Complete
ABDEN HOUSE	1196038	ELECTRICAL ASSIST CONTRACTOR/CON	905	test document	HELPDESK	DREW DICK	25/09/2017 1	Hold	Update	Complete
OLD COLLEGE	1196037	ELECTRICAL ASSIST CONTRACTOR/CON	1	test telephone	HELPDESK	DREW DICK	25/09/2017 1	Hold	Update	Complete
ABDEN HOUSE	1196036	ELECTRICALIDEMO	905	test cf schedule future	HELPDESK	DREW DICK	22/09/2017 1	Hold	Update	Complete
ABDEN HOUSE	1196035	ELECTRICALIDEMO	905	test cf	HELPDESK	DREW DICK	22/09/2017 1	Hold	Update	Complete
ABDEN HOUSE	1196032	ELECTRICAL ASSIST CONTRACTOR/CON	905	schedule test 1	HELPDESK	AFM	22/09/2017 1	Hold	Update	Complete
ABDEN HOUSE	1196031	ELECTRICAL ASSIST CONTRACTOR/CON	905	schedule test	HELPDESK	AFM	22/09/2017 1	Hold	Update	Complete
OLD COLLEGE	1196028	ELECTRICALIASSIST CONTRACTOR/CON	1	test 31st Aug am	HELPDESK	DREW DICK	21/09/2017 1	Hold	Update	Complete
OLD COLLEGE	1196027	ELECTRICALIASSIST CONTRACTOR/CON	1	test mobile pm wed 30th	HELPDESK	DREW DICK	21/09/2017 1	Hold	Update	Complete
KBTRADES MAINT UNIT	1196023	ELECTRICAL ASSIST CONTRACTOR/CON	677	test mobile	HELPDESK	DREW DICK	13/09/2017 1	Hold	Update	Complete
MED/BRISTO GENERAL	1196022	ELECTRICAL/CCTV/ALARMS	100	test	HELPDESK	AFM	13/09/2017 2	Hold	Update	Complete
OLD COLLEGE	1196019	EXTERNALIHEALTH & SAFETY	1	test	HEI PDESK		28/08/2017 0	Hold	Undate	Complete

Refresh your screen regularly to view new work requests. Further work requests in your queue not currently showing on your screen, will be notified by the **(E) More, View Them** button, select this to load these work requests

If more than 50 records select 'Show Next' at bottom of screen

#### 1.3. Reviewing a Work Request

Before assigning a **Work Request**, you may need to review the details.

• Rejected (0/2) 🗆								
Requested (1/1) 🗆								
INFIRMARY ST,09-11	1196054	ELECTRICAL/EMERGENCY LIGHTING	305	Test			02/10/2017	0
Assigned to Work Order (9	/72)							
INFIRMARY ST,09-11	1196062	ELECTRICAL LIGHTING	305-01-1.05	Light not working	HELPDESK	GARY GRAHAM	03/10/2017	1
ASHWORTH EXTENSION	1196060	GLAZING/GLAZING REPAIR	644-02-2.05A	11/09 EM TEST	MS_HOLYROOD		26/09/2017	0
OLD COLLEGE	1196050	ELECTRICAL JEMERGENCY LIGHTING	11-B.65	rererereer	HELPDESK	GARY GRAHAM	28/09/2017	5
ABDEN HOUSE CAR PARK	1196047	ELECTRICAL ASSIST CONTRACTOR/CON	6905	test	MS_POLLOCK		27/09/2017	0
OLD COLLEGE	1196046	ELECTRICAL EMERGENCY LIGHTING	11-B.04	test	HELPDESK		27/09/2017	0
FORREST RD,41	1196045	GLAZING GLAZING REPAIR	106-00	TEST6 EM	HELPDESK	AARON WILSON	27/09/2017	3
U NIG SANDERSON BLD	1196043	ELECTRICALIHEATING	601-02	TEST4 EM	HELPDESK		20/09/2017	0
ALSON HOUSE	1196034	BLINDS/CURTAINSINEW INSTALLATION	110	test mob1	HELPDESK	AFM	05/01/2018	2
D ALD COLLEGE	1196018	ELECTRICAL ASSIST CONTRACTOR/CON	1	test	HELPDESK		04/09/2017	0
63 more, view them								
Issued and In Process (108	8/108) 🗆							
FLOWAVE TT BUILDING	1196061	PLUMBINGIFLOOD	676-01-1.Z3	11/09 TEST EM	M5_HOLYROOD	BOBBY LONNIE	18/09/2017	2
THOMSONS LAND	1196055	FLOORING/DOOR MATS	555	*T*VERIFICATION TEST	CS_CENTRAL	BOBBY LONNIE	15/01/2018	2
HOLYROOD CAMPUS GENERAL	1196053	ELECTRICALILIGHTING	550	test of return	HELPDESK	GARY GRAHAM	29/09/2017	1
OLD COLLEGE	1196051	ELECTRICAL/EMERGENCY LIGHTING	11-B.65	rerrererer	HELPDESK	NEIL THOMPSON	28/09/2017	2
EDWARD SALVESON HALL	1196041	PLUMBING/WATER	861-06	TEST3 EM	M5_HOLYROOD	ALAN ANDERSON	20/09/2017	2
ABDEN HOUSE	1196038	ELECTRICAL ASSIST CONTRACTOR/CON	905	test document	HELPDESK	DREW DICK	25/09/2017	1
OLD COLLEGE	1196037	ELECTRICAL ASSIST CONTRACTOR/CON	1	test telephone	HELPDESK	DREW DICK	25/09/2017	1

#### 1.3.1. Displaying the work request pop-up screen

Navigate to the **Assigned To Work Order** section of the **Building Operations Console** page.

(Appendix A Using Filters for further guidance on how to use specific criteria to perform a search)

0 selected				
Building Name	<ul> <li>Work Request Code</li> </ul>	<ul> <li>Problem Type</li> </ul>	<ul> <li>Location</li> </ul>	<ul> <li>Work Description</li> </ul>
Rejected (0/2) 🗆				
Requested (1/1)				
INFIRMARY ST,09-11	1196054	ELECTRICALJEMERGENCY LIGHTING	305	Test
Assigned to Work Orde	r (9/9) 🗉  🗛			
INFIRMARY ST,09-11	1196062	ELECTRICALILIGHTING	305-01-1.09	Light not working
OLD COLLEGE	1196050	ELECTRICAL EMERGENCY LIGHTING	11-B.65	rererereer
ABDEN HOUSE CAR PARK	1196047	ELECTRICAL ASSIST CONTRACTOR/CON	6905	test
OLD COLLEGE	1196046	ELECTRICALIEMERGENCY LIGHTING	11-B.65	test
FORREST RD,41	1196045	GLAZING GLAZING REPAIR	106-00	TEST6 EM
ENG SANDERSON BLD	1196043	ELECTRICALIHEATING	601-02	TEST4 EM
ALISON HOUSE	1196034	BLINDS/CURTAINS NEW INSTALLATION	110	test mob1
OLD COLLEGE	1196018	ELECTRICALIASSIST CONTRACTOR/CON	1	test
INFIRMARY ST,09-11	1196016	CLEANING CARPET SHAMPOO	305	gfgfdgfd
Issued and In Process (	164/164)			
Completed (0/24)				

To view the details of an individual record, click on the (A) Work Request reference.

The system will display the **Work Request** pop up screen.

Work Request		×
Problem		1
Work Request Code	1196062 Problem Type ELECTRICAL[LIGHTING	Т
Description	Light not working	
В		
$\mathbf{\tilde{\mathbf{v}}}$		1
Problem Location	MAIN LIGHT IN THE ROOM	J
More Information	Link Ne	w
<ul> <li>Reference Material</li> </ul>		
► Comments	Ac	ld
<ul> <li>History</li> </ul>		
► Trades	Ac	
► Parts	Ac	
Craftspersons	Ac	bl
<ul> <li>Tool Types</li> <li>Tools</li> </ul>	Ac	-
<ul> <li>Other Costs</li> </ul>	Ac	
Estimated Costs	Actual Costs	
Estimated Costs	Cost of Labour 0.00	
Estimated Cost of Cabour 0.00 Estimated Cost of Parts 0.00	Cost of Parts 0.00	
Estimated Cost of Tools 0.00	Cost of Other Parts 0.00	
Estimated Other Costs 0.00	Other Costs 0.00	
Estimated Total Cost 0.00	Total Cost 0.00	
	Lindete Browned Proved Proved Proved	
	Update Request Clos	e

The **(B) Problem** section of the pop up screen will always be displayed, and will display the description and problem location free text added by the Customer.

The following will help explain the different information you can view, or add, from this pop up screen.

1.3.2. Viewing More Information & Returning Work Request

Expand the (C) More Information section.

Work Request				
Problem				
Work Requ	lest Code 1484732		Problem Type EL	ECTRICALILIGHTING
De	scription Light not working			
Problem	Location			
<ul> <li>More Information</li> </ul>				Link Ne
Service Request Code	716326	Work Order	1480608	
Requested by	COLIN PRITCHARD(143864)	Date Requested	02/07/2021	
Requestor's Phone #	650 2479	Time Requested	15:08	
School	P62	Site Code	BIOQ/BUSH	
Subject Area Code	D916	Building Code	2705	
Account Code		Floor Code	00	
Status	Requested V	Room Code	G.05	
Date to Perform	02/07/2021	Equipment Code		
Time to Perform Work		EIT Number		
Document 1	Upload a document	Document 2	Upload a document	1
Document 3	Upload a document	Document 4	Upload a document	1
[	Indicate on Drawing			
Recharged	No 🗸			
Related Requests				
	15 Working Days     5 Working Days     Urgent     Emergency     By Agreed Date		Workflow Response required within 3 Da Completion required within 1: Workflow Steps: On status of Requested: Edit a	
			Request will be dispatched to	HELPDESK

This section highlights additional details for the Work Request, such as the current status or if the work is rechargeable.

If you need to update the parameters of a work request after approval, the request must be returned to REQUESTED status in order for Helpdesk to update these. Requests can also be returned to an earlier point in the workflow for other reasons. See Appendix for valid moves & reasons to change Work Request Status.

You can reset or change the status step of the work request to an earlier point in the workflow by selecting the drop down menu **(D) Status** 

(**Note:** Please see appendix B to view the work request life cycle)

School	P62
Subject Area Code	D415
Account Code	
Status	Issued and In Process V
Date to Perform	Requested Rejected
Time to Perform Work	Approved
Document 1	Assigned to Work Order Issued and In Process
Document 3	On Hold for Parts On Hold for Access On Hold for Labor
Related Requests	Completed
Priority*	<ul> <li>15 Working Days</li> <li>5 Working Days</li> </ul>

NOTE: \*RET\* to be added as prefix in problem description when returning to Requested as this will help highlight to Helpdesk Technicians

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Once you have selected the new status step, the **Return Work Request** pop up screen displays.

You are required to leave (E) Comments, and then select (F) Update Request to complete the change in status step.

(NOTE: Selecting Cancel will return you to the **Work Request** pop up screen with no changes made.)

turn Work Request 1196053		
is action returns the request to prior status or a prior workflow step.		
tus: Assigned to Work Order		
nments		
	$\bigcirc$	
	(F)	

# 1.3.3. Viewing A Floorplan

There is an option that can display the floor plan for the location attached to the work request. Due to changes Flash Drive in 2021, floorplans are only viewable if using the Harman browser. This can be downloaded from the software centre if needed.

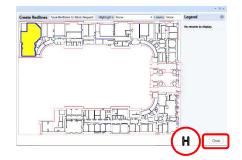
In the More Information section, select the (G) Indicate On Drawing option.

<ul> <li>More Information</li> </ul>				Link New
Service Request Code	716326	Work Order	1480608	
Requested by	COLIN PRITCHARD(143864)	Date Requested	02/07/2021	
Requestor's Phone #	650 2479	Time Requested	15:08	
School	P62	Site Code	BIOQ/BUSH	
Subject Area Code	D916	Building Code	2705	
Account Code		Floor Code	00	
Status	Requested ~	Room Code	G.05	
Date to Perform	02/07/2021	Equipment Code		
Time to Perform Work		EIT Number		
Document 1	Upload a document	Document 2	Upload a document	Ť
Document 3	Upload a document	Document 4	Upload a document	1
Recharged	Indicate on Drawing			
Related Requests				
Priority*	15 Working Days     5 Working Days     Urgent     Emergency     By Agreed Date		5)	Days d Approve is required by HELPDESK OPERATOR
			Request will be dispatched to H	ELPDESK

The system will display a floor plan pop up screen, and highlight the room associated with the work request in yellow.

Select the **(H) Close** option and the system will return you to the **Work Request** screen.

Note: To view use Harman.



#### 1.3.4. Viewing And Adding Documents/ Attachments

There is an option to view or upload documents to the **Work Request**.

Attached documents will be visible towards the bottom of the More Information section **(I) Document**.

Selecting the **(J) Page Icon/checkout Document** will allow you to view the document in a pop-up screen.

Note: Check out Document works better for large pictures

<ul> <li>More Information</li> </ul>				Link New
Service Request Code	716326	Work Order	1480608	
Requested by	COLIN PRITCHARD(143864)	Date Requested	02/07/2021	
Requestor's Phone #	650 2479	Time Requested	15:08	
School	P62	Site Code	BIOQ/BUSH	
Subject Area Code	D916	Building Code	2705	
Account Code		Floor Code	00	
Status	Requested ~	Room Code	G.05	
Date to Perform	02/07/2021	Equipment Code		
Time to Perform Work		EIT Number		
Document 1	wr-1484732-doc1.pdf	Document 2	Upload a document	
Document 3	wr-1484732-doc3.pdf	and the second	Upload a document	
	Indicate on Drawing	00		
Recharged	No 🗸			
Related Requests				
Priority <sup>*</sup>	<ul> <li>15 Working Days</li> <li>5 Working Days</li> <li>Urgent</li> <li>Emergency</li> <li>By Agreed Date</li> </ul>		Workflow Response required within 3 Days Completion required within 15 Days Workflow Steps: On status of Requested: Edit and Approve is required by	HELPDESK OPERATOR
			Request will be dispatched to HELPDESK	

If you wish to upload a document, find a blank Upload A Document field and select the **(K) Upload Arrow** icon

(**NOTE**: when uploading a document, you will need to have the item saved to a location you can access)

The system will display the **Check In New Document** pop up screen.

Select the (L) Browse option.

$\bigcirc$	Check In New Document	
9	Browse No file selected.	
	Set Lock Status	
	ОК Са	ncel 🕕

#### **1.3.5. Viewing And Adding Comments**

There is an option to view or add any comments for a **Work Request**.

It is important to record comments in order to capture all updates and amendments to a work request, this provides a date & time stamped record of all actions taken

(**NOTE**: if you are making any amendments to a work request, it is important to add a comment, as this will help support why you performed the action).

This section highlights any additional comments added to the **Work Request**.

Expand the (R) Comments section.

The system will then display the standard Microsoft File Browser pop up screen.

Navigate to the required file and either double click on it or select the (M) Open option.

The system will then select the chosen file, close the **File** Browser Pop up screen and return you to the Check In New Document pop up screen.

(NOTE: Selecting the Close option will close the File Browser pop up screen and return you to the **Check In New Document** pop up screen without taking any action)

The **Check In New Document** pop up screen will now show (N) display the file selected for attaching to the work request.

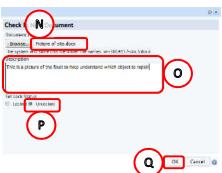
It is important to add (O) A Description to help explain the nature of the attached document.

Ensure the set lock status (P) Unlocked option has been selected

Then select the (Q) Ok option.

The system will then upload the document and description to the work request, close the Check In New Document pop up screen and return you to the Work Request screen.

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Problem					
	Work Request Code 38641	84		Problem Type FLOORINGICARPET	
	Description R2 sce				
	Problem Location whole				
	Problem Location whole	oom			
More Information	ation			$\sim$	
▼ Comments					Ac
	Comments ID Added By	Date Added	Time Added	Comments	
	142 ATL01	31/08/2016	15:24	Updates made to the work request	

The system will display the **Add Comments** pop up screen.

Enter any narrative in the **(T) Comments** field, and then select the **(U) Save** option.

The system will record the narrative to the work request, close the **Add Comments** pop up screen and return you to the **Work Request** screen.



(**NOTE**: if you select the Close option, the system will close the Add Comments pop up screen without saving the narrative)

To view any existing comments, hover your mouse over **(V)** Comments column to see comments previously recorded in full.

Note: All comments are viewable to the customer

#### **1.3.6. Viewing The Work Request History**

There is an option to view the work request history.

Expand the **(W) History** section, this shows a history log of the Work Request to date.

Hover your mouse over the **(X) Comments Field** to see comments recorded by the member of Estates staff who have updated a work request.

This field contains comments from a status change, or updates by the Helpdesk from the approval step.

(**NOTE:** please note this cannot be seen by the Craftsperson when they receive the work request to a handheld device but are still viewable to the customer)

1	Work Request					- 0
- 1	Problem					
			586-4149 Coming away from the wall ehind door , right hand side of	freplace.	P	hoblem Type JOINER/FOCTURES & FITTINGS
v)	<ul> <li>More Informati</li> <li>Comments</li> <li>History</li> </ul>					Add
	Step Responded By	On	Workflow Step	Status	Step Status After	Comments
		12/08/2016 10:36	Basic	Requested	None	
		12/08/2016 10:37 12/08/2016 10:37	Edit and Approve Basic	Requested Approved	Approved None	HD01 : Request has been reviewed for fields [p
		12/08/2016 10:37	Basic	Assigned to Work Order	None X	HD01 :: Request has been reviewed for fields [priority] Comments: Changed priority from 5 days to 15
	ATL01	12/08/2016 10:37	Forward to Supervisor	Assigned to Work Order	None	Connector coardier broads in our 2 marks to 12
	-					
	Trades					Add
	Parts					Add

#### 1.3.7. Rechargeable Work in a Non-Rechargeable Building

If a work request is rechargeable to the customers department, and the customer is not based in a building which is on a rechargeable model, this will need to be captured in the work request to allow Estates Finance to retrieve the amounts from other Schools/Colleges (previous eIT process).

If the customer knows in advance that they should pay for their request, they can include their P&M charge of accounts code string (CoA) when raising a work request. This will then be viewable in the **Description**.

Work Request				
Problem				
	Work Request Code	1543036	Problem Type JOINERYJFIXTURES & FITTINGS	
		3 coat hooks to be inserted on raised area of wall next to door of office. Please provide costs to site. 110.110002.40088023.2954.101421.10000100.0000000.000.000000.000000		

If the customer is not aware, the Helpdesk team will attempt to identify any rechargeable work during the approval step. They will then flag this via their approval comments in **(Y) History section**, and via **(Z) Works Description** adding the prefix code \*RECHARG\* before passing to the relevant Estates Team to progress.

Work Request						* 0 ×									port Problem
Problem							Show 200 Newest Requests 🗸 Building		Flaor Roam	Problem Type	More	Clear Filter	Recent · Group By Status	~	
	Work Request Code 38 Description Of Problem Location				hoblem Type DECORATION/EXTERNAL		0 selected Building Norme	. Work Request Code		- Work Description	. Noor .	Assigned To	Excelated for Due Date _ Completion*		
More Information						0	▼ Requested □ Ø								
► Comments						Add 0	SOUTH GYLE STORE	3864334	JOINERY/CEILINGS	test 1		MAUREEN MASSON	20/09/2016 Yes		
▼ History					( )	0	KINCAIDS COURT	3864306	JOINERY/WINDOWS	R3 scenario 1j EM	01	ATT04	26/09/2016 Yes		
Step Responded By	Crt	Workflaw Step	Stetus	Step Status	ownents	Ĩ	Assigned to Work Order E	] (4)			<u>۱</u>				
	12/09/2016 16:16	Basic	Requested	None			INFIRMARY ST.09-11	3864439	CLEANING/DEEP CLEAN	test 7			01/02/2017 No	Estimate	Schedule
H001	12/09/2016 16:17	Edit and Approve	Requested	Approved	This work request should be rechargeable		OLD COLLEGE	3864336	CALL OUT/ELECTRICIAN	test 1	1		15/10/2016 No	Estimate	Schedule
	12/09/2016 16:17	Bask	Approved	None			OLD COLLEGE	3064355	DECORATIONMISC REQUESTS	The second	4	ALAN MCCRAE	19/01/2017 No	Estimate	Schedule
	12/09/2016 16:17	Basic	Assigned to Work Order	None		_	INFIRMARY ST.09-11	3864312	DECORATIONEXTERNAL	"RECHRG" CP test	00	MAUREEN MASSON	14/01/2017 No	Estimate	Schedule
► Trades						Add ()	SHALL ANIMAL AND RIDDELL SH	ANN 5864262	HEATING ENGINEER/WATER		01	ATT02	15/09/2016 No	Estimate	Schedule
							OLD COLLEGE	3864165	ELECTRICALIEMERGENCY LIGHTIN	G To fix details	01		19/09/2016 Yes	Estimate	Schedule
Parts						Add 0	▼ Issued and In Process □	(16)							
<ul> <li>Craftspersons</li> </ul>						Add ()		3064181	ELECTRICALIELECTRICAL EQUIPH	INT test		ATT01	11/10/2016 No	Held	Stop
<ul> <li>Tool Types</li> </ul>						0	INFIRMARY ST.02-11	3064578	CLEANING	test		ATH	28/09/2016 No	Hold	Stop
<ul> <li>Tools</li> </ul>						Add 🕕	OLD COLLEGE	3864377	FURNITUREIMISC REQUEST	NOW URGRNT RECHARGEABLE check for edit describic	n -1	ATT01	12/10/2016 No	Hold	Stop
Other Costs						Add 0	INFIRMARY ST.09-11	3864376	ELECTRICALIEMERGENCY LIGHTIN	G test	01	ATT02	11/10/2016 No	Hold	Stop

The customer should then be contacted by the Supervisor/ATL out with the system to agree a cost estimate and timescale, and to confirm they wish to proceed. The

customer will then be required to provide their CoA codes to Supervisor/ ATL before work can proceed.

The CoA should then be entered by the Supervisor/ATL into (A)Description and (B)Comments within the work request pop up screen, ensuring the drop down (C)Recharged is also set to YES.

Request							
W	ork Request Code 1543036			Probl	em Type JOINERY/FIXTURES & FITTI	NGS	
	Please provide o 110.110002.400	oat hooks to be inserted on raised a osts to site. 88023.2954.101421.10000100.000					1
	Problem Location G.03					]	J
re Information						U	Link N
	Request Code 774937			Work Order			
	Requested by			Date Requested			
Reques	stor's Phone #			Time Requested			
	School P7C			Site Code	HOLYROOD		
Subj	ect Area Code D431			Building Code	9		
	Account Code			Floor Code	00		
	Status Assigned to Work	Order 🗸		Room Code	G.03		
Da	ate to Perform 13/04/2022			Equipment Code			
Time to	Perform Work			EIT Number			
	Document 1 Upload a document	1		Document 2	Upload a document	1	
	Document 3 Upload a document			Document 4	Upload a document	*	
C	Recharged Yes V ated Requests Priority* _ 15 Working Day				Workflow		
	5 Working Days Urgent Emergency By Agreed Date				Response required within 5 Days Completion required within 90 Days Workflow Steps: On status of Requested: Edit and App		ER/
					Request will be dispatched to HELPD	ESK	
erence Material Iments							
Comments ID Adde	d By	Date Added	Time Added	Comments			
B 129.301 FTHO		13/04/2022	12:19		de costs to site so they can raise		

### 1.3.8. Linking A Work Request (Follow on Work)

You can link two or more related work requests together, by creating a second or third new request.

This feature can be used where work request needs to be carried on by a different work team (e.g. Maintenance Services -> Contract Services). This might be because the work can't be completed by the original team (scale/expertise/complexity), or there is an additional or consequential piece of work required that requires another work team to complete.

By creating a link from an existing request to a new request, you can set a new priority timescale and/or problem type for the new request.

To do this access the **Work Request** pop up screen of the existing request by selecting **(A) Work Request code**.

0 selected				
Building Name	Work Request Code	<ul> <li>Problem Type</li> </ul>	<ul> <li>Location</li> </ul>	<ul> <li>Work Description</li> </ul>
Rejected (0/2)				
Requested (1/1) 🗉				
INFIRMARY ST,09-11	1196054	ELECTRICALJEMERGENCY LIGHTING	305	Test
Assigned to Work Order	(9/ <u>9)</u> 🗉 🔺			
INFIRMARY ST,09-11	1196062	ELECTRICALILIGHTING	305-01-1.09	Light not working
OLD COLLEGE	1196050	ELECTRICALIEMERGENCY LIGHTING	11-B.65	rererereer
ABDEN HOUSE CAR PARK	1196047	ELECTRICALJASSIST CONTRACTOR/CON	6905	test
OLD COLLEGE	1196046	ELECTRICALJEMERGENCY LIGHTING	11-B.65	test
FORREST RD,41	1196045	GLAZING GLAZING REPAIR	106-00	TEST6 EM
ENG SANDERSON BLD	1196043	ELECTRICALIHEATING	601-02	TEST4 EM
ALISON HOUSE	1196034	BLINDS/CURTAINSINEW INSTALLATION	110	test mob1
	440(040			

Select (B) More information triangle, and then (C) Link New.

Problem				
Work Reques	Code 1196062		Problem Type	ELECTRICALILIGHTING
Desci	iption Light not working			
Problem Lo	Tation MAIN LIGHT IN THE ROOM			
More Information				Lin
Service Request Code 42	4762	Work Order	1195055	
Requested by CC	LIN PRITCHARD(143864)	Date Requested	12/09/2017	
Requestor's Phone # 65	0 2479	Time Requested	9:53	
School P6	2	Site Code	HOLYROOD	
Subject Area Code D4	15	Building Code	305	
Account Code		Floor Code	01	
Status As	signed to Work Order 🔻	Room Code	1.09	
Date to Perform 12	/09/2017	Equipment Code		
Time to Perform Work		EIT Number		

The **Report Related Problem** pop up screen then displays, allowing a new linked work request to be raised.

The parameters of the existing work request i.e. (D) Location and (E) Problem Type will pre-populate, however these can be changed if required.

Work Req	quest		
Problem			
	Work Request Code 1196046 Description test	Problem Type ELECTRICAL/EMERGENCY LIGHTING	
	Problem Location		
<ul> <li>More Inf</li> </ul>			Link New
	Service Request Code 424746	Work Order 1195042	
	Report Related Problem Requestor		
	Requested By	COLIN PRITCHARD(143864)	
	Requestor Phone	650 2479	
	Location		
	D	Use your assigned workspace location  HOLYROOD 1 -1 B.04  Building is required. Enter floor and room number to help us process your request faster.	
	Describe the location		K OPERATOR
<ul> <li>Reference</li> <li>Comment</li> <li>History</li> <li>Trades</li> <li>Parts</li> </ul>	Type of Problem	ELECTRICAL	
<ul> <li>Craftspe</li> <li>Tool Type</li> <li>Tools</li> <li>Other Co</li> </ul>	es		
Estimated	Costs	Actual Costs	
E	imated Cost of Labour 0.00 istimated Cost of Parts 0.00 stimated Cost of Tools 0.00 Estimated Other Costs 0.00 Estimated Total Cost 0.00	Cost of Labour 0.00 Cost of Parts 0.00 Cost of Other Parts 0.00 Other Costs 0.00 Total Cost 0.00	
		Update Request Forward Reque	est Close

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Report	Related	Problem
--------	---------	---------

, F Description*	
G EIT Number	Select Description
	<ul> <li>15 Working Days</li> <li>5 Working Days</li> <li>Urgent</li> <li>Emergency</li> <li>By Agreed Date</li> </ul>
	<b>Workflow</b> Response required within 3 Days Completion required within 15 Days Workflow Steps: On status of Requested: Edit and Approve is required by HELPDESK OPERATOR
	Request will be dispatched to HELPDESK Submit Add Documents Cancel

Once you have finished completing the **Report Related Problem** form, including description (**F**) and priority (**G**), you should submit (**H**) the request. The request will then arrive with the Estates Helpdesk for approval and follow the normal workflow.

You can repeat these steps to link multiple new work requests to an existing request. All work requests should be managed and completed in the normal way.

You can view a linked work request by selecting the work request code in the (F) **Related Requests** field in the **More Information** section of the **Work Request** pop up screen.

Problem						
	Work Request Code 1484732				Problem Type EL	ECTRICAL LIGHTING
	Description	Light not working				
Problem	m Location					
More Information						Link Nev
Service Request Code	716326			Work Order	1480608	
Requested by	COLIN PRIT	CHARD(143864)		Date Requested	02/07/2021	
Requestor's Phone #	650 2479			Time Requested	15:08	
School	School P62 Subject Area Code D916 Account Code			Site Code	BIOQ/BUSH	
Subject Area Code				Building Code	2705	
Account Code				Floor Code	00	
Status	Requested	~		Room Code	G.05	
Date to Perform	02/07/2021			Equipment Code		
Time to Perform Work				EIT Number		
Document 1	wr-1484732	2-doc1.pdf	ii t i a c i	Document 2	Upload a document	Ť
Document 3	wr-1484732	2-doc3.pdf	新学会 X	Document 4	Upload a document	1
(F)	Indicate or	n Drawing				
Related Requests						
	15 Work     5 Work     Urgent     Emerger     By Agree	ng Days ncy				5 Days nd Approve is required by HELPDESK OPERATO
					Request will be dispatched to	HELPDESK
Reference Material						

When selected the **Work Request** pop up screen of the linked request is displayed.

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roblem					
Work	Request Code 135921		Probl	em Type ELECTRICALIEMERGE	NCY LIGHTIN
	Also lig	ked wr umbers: 169, 170, 172 hts 189, 281, 282, 283, 284, 334, 337 never cam d correctly.	e on during testing. They don⊡t appea	r to be on a keyswitch. Possible	contractors
Pro	oblem Location				
More Inf Work Requ	est				C
Problem					
	Work Request Code	1348805	Problem Type	PREVENTIVE MAINT	
	Description	PPM Carry out Monthly Emergency Lighting Ch	necks (Compliance Group)		2
		MONTHLY			
					-
	Problem Location				
💌 More Info	rmation				Link New
	Service Request Code	579561	Work Order	1346138	
	Requested by	STUART BAIN(176714)	Date Requested	19/06/2019	
	Requestor's Phone #		Time Requested	9:35	
	School		Site Code	HOLYROOD	
	Subject Area Code		Building Code	335	
	Account Code		Floor Code		
	Status	Issued and In Process 🔻	Room Code		
	Date to Perform	30/07/2019	Equipment Code		
	Time to Perform Work		EIT Number		
	PM Procedure	SFG-37-01-C-M	PM Schedule Code	37102	
Reference	Document 1	Upload a document	Document 2	Upload a document	1
Commer	Document 3	Upload a document	Document 4	Upload a document	1
History		Indicate on Drawing	(G)		
STATE AND STATE	Related Requests				

At the bottom of this screen, there are a number of **(G) Action buttons**, which do the following

#### • Filter in Console

This takes you back to the Building Operations Console, filtered to only display the related request.

#### • Update Request

This confirms any changes that you have made to the related request.

#### • Forward Request

This option allows the work request to be forwarded to another work team. See section **1.4 Forwarding A Work Request To Another Team.** 

#### Close

This closes the related work request view, and returns you to the original request.

### 1.4. Forwarding A Work Request To Another Team

If a work request has been incorrectly assigned to your work team queue, you can forward it to another work team queue, provided no action has taken place and no one has been assigned.

# (NOTE: before starting this action, see **section 1.3.5 Viewing And Adding Comments**.)

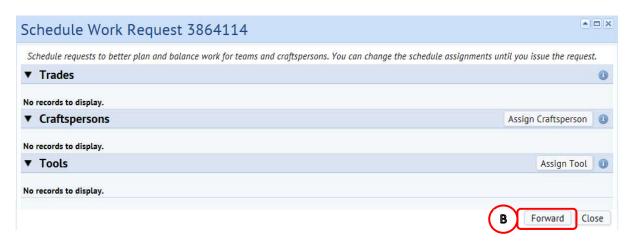
It is important to add a comment to support why you are re-assigning the work request to another team **before** your forward it on.

From the Building Operations Console page, identify and select the **(A) Schedule** option.

3864131	JOINERY DOORS AND LOCKS	3203	key wont work in lock	Approve★			
3864004	JOINERY DOORS AND LOCKS	11-B.28	Padlock has broken.	Approve			
3863945	JOINERY DOORS AND LOCKS	11-B.L01	Test	Approve			
3863851	JOINERY DOORS AND LOCKS	11-B.11	cnhcghcghgchcghgchcg	Approve★			
3863850	JOINERY DOORS AND LOCKS	1-00-G.102	main room door hinge is loose	Approve			
3863231	JOINERY DOORS AND LOCKS	11-B.22	Second test with EASE authentication on Test	Approve★			
Assigned to Wor	k Order 🔲 (12)						
3864125	JOINERY/DOORS AND LOCKS	552	faulty lock	Estimate	Schedule	Issue	Cance
3864114	JOINERY DOORS AND LOCKS	1	Door Lock Faulty Room 1	Estimate	Schedule	Issue	Cance
3864126	JOINERY DOORS AND LOCKS	256	Door closer faulty	Estimate	Schedule	Issue	Cance
3863978	JOINERY DOORS AND LOCKS	11-B.Z62	scenario test EM replace handle on door	Estimate	Schedule	Issue	Cance
3864006	JOINERY DOORS AND LOCKS	11-B.Z26	lock not working properly	Estimate	Schedule	Issue	Cance
3863194	JOINERY DOORS AND LOCKS	11-B.47	test at pollock	Estimate	Schedule	Issue	Cance
3863219	JOINERY DOORS AND LOCKS	11-B.L01	Test on 28/04/16 Then on 14 /7	Estimate	Schedule	Issue	Cance
3863196	JOINERY DOORS AND LOCKS	1-01-1.286	test SLAs set up	Estimate	Schedule	Issue	Cance
3863181	JOINERY/DOORS AND LOCKS	11-B.57	Test 2	Estimate	Schedule	Issue	Cance
3863183	JOINERY DOORS AND LOCKS	1-00	TEST MASS	Estimate	Schedule	Issue	Cance
3863184	JOINERY DOORS AND LOCKS	305-00	TEST	Estimate	Schedule	Issue	Cance
3863186	JOINERYIDOORS AND LOCKS	305	test	Estimate	Schedule	Issue	Cance

The system will display the following pop up screen.

Select the (B) Forward option, to select the required work team.



(**NOTE**: If you select the **Close** option, you will be returned to the Building Operations Console page without taking any action).

The system will display the Forward Work Request pop up screen.

Forward Work Request 3864	114
Supervisor Work Team Code	C Save

(NOTE: If you select the **(C) Save** option without populating a team, the system will prompt you to enter details)

You can select which team to forward to in 2 different ways:

i) Typing directly **Work Team Code** field, which will start to provide a drop down list to select from

# Or

ii) Hovering your mouse over either field will provide an additional **(D) Option.** 

(NOTE: UoE only use the Work Team Code option, not the **Supervisor**)

Selecting **(D)** option will provide a further **Select Value** pop up screen, with details of all available entries for that field.

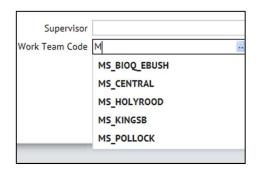
When you have identified the **(E) Entry** required, clicking on it will select the chosen option, close the **Select Value** screen and populate the details on the **Forward Work Request** screen.

(**NOTE**: Selecting **(F) Close** will return you to the **Forward Work Request** screen without copying across any details).

If you select a wrong team, you can repeat these steps until you have the desired team.

When you have the correct team populated, select the **(G) Save** option, which will return you to the Building Operations Console screen.

The Work Request will have disappeared from your Building Operations Console screen, and will now be visible in the respective Work Team queue.



Supervisor	
Work Team Code	( D )

Select V	alue - Work Team Code		* 0 X			
Work Team Co	de; B(1) C(4) E(2) F(3) H(12) K(1) L(1) M(5) S(3) Z(2)	All[34]				
Work Team Coa	e	Description	ō			
BLD_SERVICES		BLD_SERVICES	•			
CS_ACE		CS_ACE				
CS_CENTRAL		CS_CENTRAL				
CS_KINGSB		CS_KINGSB				
C5_MVM		CS_MVM				
EBIS		EBIS				
EST_DEVLOP		EST_DEVLOP				
FESTIVAL		FESTIVAL				
FIRE_SAFETY		FIRE_SAFETY				
FURNITURE		FURNITURE				
HD_G_L_PC		HD_G_L_PC				
HD_OPS_ACCO	M	Accom Services				
HD_OPS_CENT	RAL	Central Work Team				
		(F)	Close			

144
BLD_SERVICES
G

A work request can also be forwarded at status **Issued and in Process**.

(Note: The preferred method for passing work to another team after actions have been taken is via Link New function, see section 1.3.8 Linking A Work Request)

					D X		Report Pr	oblem 😥 •
			Work Request		D.A.			
Show 200 Newest Requests * Site	Building		Problem					
			Work Request Code 1216031	Problem Type ELECTRICAL/LIGHTING				
Building Name		a history	Description Main light out			Repair Type		
Issued and In Process (200/20						in when the		
HOLYROOD CAMPUS GENERAL	1216093	ELECTRIC						
HOLYROOD CAMPUS GENERAL	1216093		Problem Location MAIN LIGHT					
ADAM HOUSE	1216092	ELECTRIC						
OLD COLLEGE		ELECTRIC	<ul> <li>More Information</li> </ul>		Link New			
INFIRMARY ST.09-11	1216080		<ul> <li>Reference Material</li> </ul>					
OLD COLLEGE		EXTERNA	► Comments					
THE UDE BUSINESS SCHOOL	1216044	PROJECTI	<ul> <li>History</li> </ul>					
INFIRMARY ST.09-11	1216038		► Trades					
NEW COLLEGE		PLUMBIN	► Parts					
CHARTERIS LAND			► Craftspersons					
ADV COMPUTING FAC	1216016	EXTERNA	Tool Types					
ASCHAM COURT			► Tools					
	1216008					CLEAN FLU TUBE AND DIFFUSER>S		
LIBRARY, GEORGE SO						MISCELLANEOUS		
HOPE PARK SO.08			Estimated Costs	Actual Costs		REQUEST COMPLETE		
INFIRMARY ST.09-11		CLEANIN	Estimated Cost of Labour 0.00	Cost of Labour 0.00		negette constant		
INFIRMARY ST.09-11		DECORAT	Estimated Cost of Parts 0.00	Cost of Parts 0.00				
INFIRMARY ST.09-11		EXTERNA	Estimated Cost of Tools 0.00	Cost of Other Parts 0.00				
INFIRMARY ST.09-11	1215999	CALL OUT	Estimated Other Costs 0.00	Other Costs 0.00				
INFIRMARY ST.09-11		ELECTRIC	Estimated Total Cost 0.00	Total Cost 0.00				
INFIRMARY ST.09-11	1215996	DECORAT	IL LA WILL DOWN					
INFIRMARY ST.09-11	1215995	DECORAT	opute non nequest					
INFIRMARY ST.09-11	1215994	CALL OUT	Equipment Down (Hours) 0.00	Cause Code		ATTEND		
INFIRMARY ST.09-11		ELECTRIC	Current Equip. meter reading 0.00	Repair Type				
INFIRMARY ST.09-11	1215992		Craftspersons Notes			PLASTER REPAIR THEN DECORATION		
INFIRMARY ST.09-11	1215991	CALL OUT						
INFIRMARY ST.09-11	1215990				10			
INFIRMARY ST.09-11	1215988							
INFIRMARY ST.09-11	1215987							
INFIRMARY ST.09-11	1215983	BLINDS/0						
INFIRMARY ST.09-11	1215982	BLINDS/C						
INFIRMARY ST.09-11	1215981	BLINDS/0						
INFIRMARY ST.09-11	1215979	BLINDS/C						
INFIRMARY ST.09-11	1215978	BLIND5/0						
INFIRMARY ST.09-11	1215977	BLINDS/0						
INFIRMARY ST.09-11	1215974	BLIND5/0			$\sim$			
CHURCHILL HOUSE		PLUMBIN			1.			
ST CECILIAS HALL								
otal records: 200					<u> </u>			

To do this access the **Work Request** pop up screen of the existing request by selecting **(H) Work Request code**.

Then select (I) Forward Request button, and the system will display the Forward Work Request pop up screen.

Forward Work Request 3864114	
Supervisor Work Team Code	
	Save

Now repeat the previous steps to forward the work request to the correct work team using (J) Work Team Code.

#### 1.5. Assigning A Craftsperson To A Work Request

A Work Request can be assigned to a single or multiple craftsperson, though initially we will focus on assigning to a single craftsperson.

										Re	port Problem	🛯 🖻 •
All	Site	Building	Floor	Problem Type	More Clear Filter	Recent  Group By Status						
0 selected		Work Request Code	<ul> <li>Problem Type</li> </ul>	- Location	Work Description	<ul> <li>Work Team Code</li> <li>Assigned To</li> </ul>	<ul> <li>Due Date</li> </ul>	= No. cf = Repair Trope	A			
	Work Order (14/1702)		<ul> <li>Problem type</li> </ul>	e Location e	Pora Description	Hork reall code     Assigned to	B DOC DOLC	a net cy a neputi type a				
CENTRAL	MEDICAL SCHOOL, TEVIOT	1359641	ELECTRICALIAUTOMATIC DOORS	113	*URG* Main doors to doorway 4. People are unab	MS CENTRAL	12/08/2019	0	Estimate	Schedule	Issue	Canc
CENTRAL	BRISTO PLACE,19	1359633	JOINERY SHELVING/NOTICE BOARDS	3004-01	*5* 19/2 Bristo Square - Pin board in bedroom 1	MS CENTRAL	05/08/2019	0	Estimate	Schedule	Issue	Cano
CENTRAL	MEDICAL SCHOOL, TEVIOT	1359628	ELECTRICALILIGHTING	113-01	*15* Doorway 4 - Light out on main stairwell (L	MS_CENTRAL	19/08/2019	0	Estimate	Schedule	Issue	Cana
CENTRAL	BUCCLEUCH PLACE LANE ACCOM	1359627	JOINERY/WINDOWS	3006	*5* Buccleuch place lane block 5 flat 5 kitche	MS_CENTRAL	05/08/2019	0	Estimate	Schedule	Issue	Can
CENTRAL	BUCCLEUCH PLACE LANE ACCOM	1359626	JOINERY/WINDOWS	3006	*5* Buccleuch place lane block 4 flat 1 kitchen	MS_CENTRAL	05/08/2019	0	Estimate	Schedule	Issue	Can
CENTRAL	BUCCLEUCH PLACE LANE ACCOM	1359624	ELECTRICALIEXTRACTOR FAN	3006	*5* Buccleuch place lane block 4 flat 1 room 2	MS_CENTRAL	05/08/2019	0	Estimate	Schedule	Issue	Can
CENTRAL	CHRYSTAL MACMILLAN BUILDING	1359615	PLUMBING[TOILETS	112-01-1.Z06	*URG* CMB- level 1- stainwell 2 side- ladies to	MS_CENTRAL	12/08/2019	0	Estimate	Schedule	Issue	Can
CENTRAL	BUCCLEUCH PLACE LANE ACCOM	1359614	JOINERY/WINDOWS	3006	*15* Buccleuch place lane block 5 flat 1 room	MS_CENTRAL	19/08/2019	0	Estimate	Schedule	Issue	Can
CENTRAL	BUCCLEUCH PLACE LANE ACCOM	1359613	JOINERY/WINDOWS	3006	*15* Buccleuch place lane block 4 flat 2 room 3	MS_CENTRAL	19/08/2019	0	Estimate	Schedule	Issue	Can
CENTRAL	BUCCLEUCH PLACE LANE ACCOM	1359610	JOINERYJBLINDS	3006	*15* Buccleuch place lane block 5 flat 16 room	MS_CENTRAL	19/08/2019	0	Estimate	Schedule	Issue	Can
CENTRAL	LIBRARY, GEORGE SQ	1359605	JOINERY/DOORS AND LOCKS	2241-L.Z38	*5* lgf Gents Toilet LZ38. third cubicle door	MS_CENTRAL	05/08/2019	0	Estimate	Schedule	Issue	Can
CENTRAL	BAYES CENTRE	1359600	JOINERYJFIXTURES & FITTINGS	285	*15* Could I ask to attach back support in disa	MS_CENTRAL	19/08/2019	0	Estimate	Schedule	Issue	Can
CENTRAL	BUCCLEUCH PLACE LANE ACCOM	1359598	JOINERY/WINDOWS	3006	*5* Buccleuch place lane block 5 flat 16 hallwa	MS_CENTRAL	05/08/2019	0	Estimate	Schedule	Issue	Can
CENTRAL	EDWARD SALVESON HALL	1359596	ELECTRICALILIGHTING	861	*5* Edward Salvesen room 503, please attend - c	MS_CENTRAL	05/08/2019	0	Estimate	Schedule	Issue	Can

After selecting the **Schedule (A)** option, the system will display the following **Schedule To Work Request** pop up screen.

Select the (B) Assign Craftsperson option.

Schedule Work Request 3863805	
Schedule requests to better plan and balance work for teams and craftspersons. You can change the schedule assignme	ents until you issue the request.
▼ Trades	0
No records to display.	B
▼ Craftspersons	Assign Craftsperson
No records to display.	
▼ Tools	Assign Tool
No records to display.	
	Forward Close

(**NOTE**: If you select the **Close** option, you will be returned to the **Building Operations Console** screen without taking any action.

The system will display the following Assign Craftsperson pop up screen.

Assign Craftsperson					
Craftsperson Code* Date Craftsperson Assigned* Time Craftsperson Assigned* Scheduled Hours					
Work Type	UnSpecified				

The Date and time will pre-populate to capture when action is taken (C)..

(**NOTE**: If you select the **(D) Save** option without populating a name, the system will prompt you to enter details)

You can select to assign a craftsperson in 2 different ways:

i) Typing directly in the Craftsperson Code fields, which will start to provide a drop down list to select from

Or

ii) Hovering your mouse over the field will provide an additional **(E) Option.** 

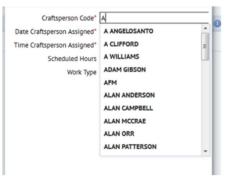
Selecting **(E)** option will provide a further **Select Value** pop up screen, with details of all available entries for that field.

When you have identified the entry required, clicking on it will select the chosen option, close the **Select Value** screen and populate the details on the **Assign Craftsperson** screen.

(**NOTE**: Selecting **Close** will return you to the **Assign Craftsperson** screen without copying across any details).

Assign Craftspers	on	
Craftsperson Code*	ATL01	
Date Craftsperson Assigned*	09/08/2016	
Time Craftsperson Assigned*	15:00	15:00
Scheduled Hours	0.00	
Work Type	UnSpecified	-
	F Save	Cancel

If you select the wrong name, you can repeat these steps until you have the desired name selected.





Select Value - Craftsperso	n	* 🗆 X
Craftsperson Code		â
5364		0
ALAN ANDERSON	ELECTRICIAN	
ARCTEST1	ELECTRICIAN	
ATL01	ELECTRICIAN	
ATT01	ELECTRICIAN	
COLIN PRITCHARD	ELECTRICIAN	
HD01	DRAWING OFFICE	
MAUREEN MASSON	ELECTRICIAN	
STEVIE MARTIN	JOINER	

When you have the name populated, select the **(F) Save** option, which will close the **Assign Craftsperson** pop up screen.

(**NOTE**, selecting the **Cancel** option will close the **Assign Craftsperson** pop up screen without taking any action and return you to the **Schedule Work Request** pop up screen)

The system will return you to the **Schedule Work Request** pop up screen, which will now display the selected craftsperson and date/time assigned.

	Work Request 11								
	s to better plan and balance	work for teams and craftspers	ons. You can chan	ge the schedu	le assignments unt	til you issue the	request.		
<ul> <li>Trades</li> </ul>									
No records to disp	ay.								
<ul> <li>Craftspers</li> </ul>	ons							Assign Craftspers	on
Craftsperson	Date Craftsperson Assigned	Time Craftsperson Assigned	Scheduled Hours	Actual Hours	Doubletime Hours	Overtime Hours	Assignment Status	Additional Comments	
COLIN PRITCHARD	12/09/2017	13:34	0.00	0.00	0.00	0.00	Active		
lo records to disp	ay.								
io records to disp	ay.								
No records to disp	ay.								
No records to disp	ay.								

Select the **(G)** Close option to return to the Building Operations Console page.

**(NOTE:** Depending on the job type, you may wish to assign more than one person to the work request.

Repeat the above steps to add further Craftsperson and the display will add each craftsperson).

▼ Craftspe	ersons								Assign Crafts	ersor
erson Da	ate Craftsperson Assigned	Time Craftsperson Assigned	Scheduled Hours	Actual Hours	Doubletime Hours	Overtime Hours	Assignment Status	Additional	Comments	
LIN PRITCHARD	12/09/2017	13:34	0	.00 00.	.00 0	0.00 0	0.00 Active			
RY GRAHAM	12/09/2017	13:38	0	.00 0	.00 0	.00 0	0.00 Active		$\sim$	

(**NOTE**: If you need to remove a craftsperson, select the X option **(H)** to the right of the row, and this will remove their details. If you remove a craftsperson in error, you can simply repeat the steps to assign a craftsperson to re-add them).

(I) Page icon duplicates the entry for the original craftsperson.

The system also allows assinging craftspersons to be applied to a group of work requests.

From the Building Operations Console screen, select the (J) Tick Boxes next to the work that require scheduling.

Show 200 Newest Rec	uests - Building	Floor	Room	Proble	em Type	Mo	ore Clear
2 selected	Estimate Schedule Issue Car	icel					
🔝 Work Request Co	de 🚽 Problem Type	Location	Work Description				
Assigned to We	ork Order 🔳 (5)						
3864150	CLEANINGIBLOOD	1	Test Work Request Primary Trade	Estimate	Schedule	Issue	Cancel
3864149	JOINERY FIXTURES & FITTINGS	1-02-2.243B	Coming away from the wall	Estimate	Schedule 🥥	Issue	Cancel
3864148	EXTERNAL DOORSJUNSECURE	1-03-3.413	Door not locking	Estimate	Schedule	Issue	Cancel
3864147	ELECTRICALIGENERATORS	1-05-5.Z1	not working as expected	Estimate	Schedule	Issue	Cancel
3864145	ELECTRICALI POWER	11-B.01	Plug socket not working	Estimate	Schedule 🔘	Issue	Cancel

An **(K)** Schedule option will appear at the top of the screen, that will allow you to schedule the selected group.

(**NOTE**: depending on how the information is displayed on the screen, you may need to scroll up to be able to view the new options that appear at the top of the screen)

The schedule work request pop up screen will appear allowing you to repeat the previous steps to assign a craftsperson.

# 1.6. Issuing The Work Request To The Craftsperson

Once you have assigned one or more Craftspeople to a work request, the system will display a **(A) Green Tick** next to the Scheduled option on the **Building Operations Console screen**.

To issue the Work Request to the assigned Craftsperson, select the **(B) Issue** option.

For Maintenance Services, this pushes the request out to the Craftspersons mobile App allowing them to carry out the works assigned.

For all other work teams, the request should only be moved to Issued status when work has progressed to the point where a purchase requisition is required.

Assigned to Wo	rk Order 🔳 (35)							
3863804	PREVENTIVE MAINT	801	10 MIN OFF LOAD RUN CHECK BATTERY MONTHLY ACCO	Estimate	Schedule	Issue	Cancel	21/07/2016
3863805	PREVENTIVE MAINT	328	CLEAN OUT SURFACE GRATINGS WITHIN THE PLEASANCE	Estimate	Schedule 🥥	Issue	<b>B</b> Incel	21/07/2016
3863806	PREVENTIVE MAINT	305	PORTABLE GENERATOR AT INFIRMARY STREET 10 MIN O	Estimate	Schedule	Issue	Cancel	21/07/2016
3863808	PREVENTIVE MAINT	225	Carry out weekly fire alarm test & fill in	Estimate	Schedule	Issue	Cancel	12/07/2016

The system will display the Issue Work Request warning screen.

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Select the **(C) Yes** option to complete the action and submit the work request to the selected Craftsperson.

(**NOTE** - Craftsperson – indicates a team member in any work team tasked with completed the Work Request.)



(**NOTE**: Selecting the **No** option will return you to the **Building Operations Console** screen without taking any action)

The system also allows issuing to be applied to a group of work requests.

From the Building Operations Console screen, select the **(D) Tick Boxes** next to the work requests that require approval.

Show 200 Newest Req	uests - Building	Floor	Room	Proble	em Type	М	ore Cle
			Work Description				
		$\smile$					
<ul> <li>Assigned to Wo</li> </ul>		$\smile$					6
Assigned to Wo     3864150	CLEANINGBLOOD	1	Test Work Request Primary Trade	Estimate	Schedule	Issue	Cancel
		1 1-02-2.243B		Estimate Estimate	Schedule	lssue Issue	
3864150	CLEANINGIBLOOD		Test Work Request Primary Trade				Cance
<ul> <li>3864150</li> <li>3864149</li> </ul>	CLEANING BLOOD JOINERY FIXTURES & FITTINGS	1-02-2.243B	Test Work Request Primary Trade Coming away from the wall	Estimate	Schedule 🥥	Issue	Cancel Cancel Cancel Cancel

An (E) Issue option will appear at the

top of the screen, that will allow you to issue the selected group.

(**NOTE**: depending on how the information is displayed on the screen, you may need to scroll up to be able to view the new options that appear at the top of the screen)

The Work Request will now appear on the assigned Craftsperson's mobile device.

### 1.7. Placing A Work Request On Hold

If you are unable to complete the Work Request, you can select the **(A) Hold** option to place the work on hold. (Note: Comments should be added to explain action see section 1.3.5 Viewing and Adding Comments)

Maintenance Services **MUST** place a request On Hold for Parts before raising a purchase requisition.

uilding Operations	Console												•	₽⊻
												Report Problem	<u></u> ⊡•• ⊀	* *
Show 200 Newest Requ	ests - Building	Floor	Room		Problem Type	More	Clear	Filter Recen	t • Grou	p By Status	•			
0 selected	Work Team Code	Work Request Cade	<ul> <li>Problem Type</li> </ul>	<ul> <li>Location</li> </ul>	<ul> <li>Work Description</li> </ul>			-				Due Date 📟	Supervisor	1
Approved 🔳 (1)														
6		3864130	JOINERY DOORS & LOCKS	905	lock not working								AFM(AFM)	
Issued and In Pr	ocess 🗇 (1)								<b>`</b>					
ATL01	HELPDESK	3864141	ELECTRICAL/ELECTRICAL EQUIPMEN	T 1-01-1.Z01	Electrical Problem Description	n	A	Hold	Stop	Update	Complete	01/09/2016	ATL01	
Stopped <sup>(2)</sup>							Ú	<u> </u>						
ATT01	HD_OPS_CENTRAL	3864140	JOINERY DOORS AND LOCKS	305-00	check door			Close				31/08/2016		
	HELPDESK	3864139	HEATING ENGINEER/BOILER	305-00	test cp/stop			Close				30/08/2016		
Completed 🔳 (	157)													
ATT02	HD_OPS_CENTRAL	3864134	ELECTRICALILIGHTING	5	Light out			Survey ★	Close 🖉			16/08/2016		
E ATT02	HD_OPS_CENTRAL	3864132	DECORATION PAINTING REQUEST	1-03-3.410	test			Survey ★	Close ⊘					
	HELPDESK	3864131	JOINERY DOORS AND LOCKS	3203	key wont work in lock			Survey ★	Close ⊘			15/08/2016		
ATT02	HD_OPS_CENTRAL	3864128	KEYS/SUPPLY NEW KEYS	1	new lock locks			Close 🖉						

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The system will display a Hold Work Request pop up screen, with 3 different options.

Select the relevant option and then select the **(B) Yes** option

(**NOTE**: selecting the **No** option will return you to the Building Operations Console screen without taking any action)



The system will close the Hold Work Request pop up screen and return you to the Building Operations Console screen. The Work Request will have moved from the **Issued And In Process** status section into the relevant **On Hold** section, in this instance to the **(C) On Hold For Parts** status section.

Building Operations Con	Jone								_	
									Report Prob	lem 🖻 🔹
Show 200 Newest Requests	Building	Floor	Room	Problem Type		Recent *	Group By S	Status 🔹		
0 selected										
Assigned To	Work Team Code	<ul> <li>Work Request Code</li> </ul>	<ul> <li>Problem Type</li> </ul>	<ul> <li>Location</li> </ul>	<ul> <li>Work Description</li> </ul>				Due Date	Supervisor
▼ Approved 🖾 <sup>(1)</sup>										
6		3864130	JOINERY DOORS & LOCKS	905	lock not working					AFM(AFM)
▼ Stopped □ (2)										
TT01	HD_OPS_CENTRAL	3864140	JOINERY DOORS AND LOCKS	305-00	check door		Close		31/08/2016	
	HELPDESK	3864139	HEATING ENGINEER BOILER	305-00	test cp/stop		Close		30/08/2016	
<ul> <li>On Hold for Parts</li> </ul>	] (1)									
ATL01	HELPDESK	3864142	FIRE SAFETY[EVAC SIGNAGE	11- <mark>B</mark> .01	Electrical Problem Description		Update	Complete	01/09/2016	ATL01
▼ Completed 🖻 (158)										
ATL01	HELPDESK	3864141	ELECTRICAL/ELECTRICAL EQUIPMENT	1-01-1.Z01	Electrical Problem Description		Close ⊘		01/09/2016	ATL01
TT02	HD_OPS_CENTRAL	3864134	ELECTRICALILIGHTING	5	Light out		Survey ★	Close 🖉	16/08/2016	
TT02	HD_OPS_CENTRAL	3864132	DECORATION/PAINTING REQUEST	1-03-3.410	test		Survey ★	Close 🖉		
6	HELPDESK	3864131	JOINERY[DOORS AND LOCKS	3203	key wont work in lock		Survey ★	Close ⊘	15/08/2016	
TT02	HD OPS CENTRAL	3864128	KEYSISUPPLY NEW KEYS	1	new lock locks		Close Ø			

### 1.8. Resuming A Held Work Request

From the **Building Operations Console** screen, locate the specific work order you wish to resume

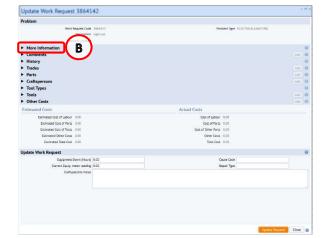
(**NOTE**: clicking on the Work Request Reference will display the Work Request screen so you can check details of the work request and confirm it is the one you wish to resume).

# Select the (A) Update option.

uilding Operations Cons	sole									•	
									Report Prob	lem 🖻 • 🕴	\$€ = (
ihow 200 Newest Requests -	Building	Floor	Room	••• Problem Type	More Clear Filt	Recent *	Group By S	itatus 🔹			
0 selected	Work Team Code									_	
	Work learn Code	<ul> <li>Work Request Code</li> </ul>	<ul> <li>Problem Type</li> </ul>	<ul> <li>Location</li> </ul>	<ul> <li>Work Description</li> </ul>				Due Date	<ul> <li>Supervisor</li> </ul>	
Approved (1)		3864130	JOINERYIDOORS & LOCKS	905	lock not working					AFM(AFM)	
Stopped <sup>(2)</sup>					to the second seco						
ATT01	HD OPS CENTRAL	3864140	JOINERY/DOORS AND LOCKS	305-00	check door		Close		31/08/2016		
	HELPDESK	3864139	HEATING ENGINEER/BOILER	305-00	test cp/stop		Close		30/08/2016		
On Hold for Parts	] (1)						A specific ball a staff				
ATL01	HELPDESK	3864142	FIRE SAFETY[EVAC SIGNAGE	11-B.01	Electrical Problem Description		Update	Complete	01/09/2016	ATL01	
Completed 🔳 (158)											
ATL01	HELPDESK	3864141	ELECTRICALIELECTRICAL EQUIPMENT	1-01-1.Z01	Electrical Problem Description		Close ⊘		01/09/2016	ATL01	
TT02	HD_OPS_CENTRAL	3864134	ELECTRICALILIGHTING	5	Light out		Survey ★	Close 🖉	16/08/2016		
ATT02	HD_OPS_CENTRAL	3864132	DECORATION/PAINTING REQUEST	1-03-3.410	test		Survey ★	Close ⊘			
	HELPDESK	3864131	JOINERY DOORS AND LOCKS	3203	key wont work in lock		Survey ★	Close 🖉	15/08/2016		
E ATT02	HD_OP5_CENTRAL	3864128	KEYSISUPPLY NEW KEYS	1	new lock locks		Close 🖉				
ATT02	HD OPS CENTRAL	3864177	ELECTRICALILIET TRAP	1	nerson tranned in lift 1		Close		09/08/2016		

The system will display the **Update Work Request** pop up screen.

Select the triangle to the right of the **(B) More Information** line to expand the section and see more detail.

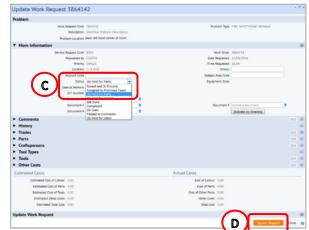


The **(C) Status** will show the current held option, select the **Issued And In Progress** option.

When you are satisfied with the selected option, select the **(D) Update Request** option.

The system will close the Update Work Request pop up screen, save the amendments and return you to the **Building Operations Console** screen.

(**NOTE**: If you select the **Close** option, you will be returned to the **Building Operations Console** screen without taking any action).



The work request will have moved from the **On Hold** status section and will now appear under the **Issued And In Progress** status section.

#### 1.9 Completing a Work Request – ATL (For Supervisors skip to Section 2.0)

When the craftsperson has undertaken the required work, they will normally complete the work request through the mobile application, recording their hours, comments, Cause Code and Repair Type.

They will then sync their device to update the Building Operations Console. This step will move the work request from (A) Issued and in Process to status step (B) Complete

Requested (0/2)					
Assigned to Work Order	(0/7)				
▼ Issued and In Process (10	0/10)				
FLOWAVE TT BUILDING	1196061	PLUMBINGIFLOOD	676-01-1.Z3	11/09 TEST EM	MS_HC
THOMSONS LAND	1196055	FLOORINGIDOOR MATS	555	*T*VERIFICATION TEST	CS_CE
HOLYROOD CAMPUS GENERAL	1196053	ELECTRICALILIGHTING	550	test of return	HELPD
OLD COLLEGE	1196051	ELECTRICAL/EMERGENCY LIGHTING	11-B.65	rerrererer	HELPD
EDWARD SALVESON HALL	1196041	PLUMBING WATER	861-06	TEST3 EM	MS_HC
ABDEN HOUSE	1196038	ELECTRICAL ASSIST CONTRACTOR/CON	905	test document	HELPD
ABDEN HOUSE	1196036	ELECTRICALIDEMO	905	test cf schedule future	HELPD
ABDEN HOUSE	1196035	ELECTRICALIDEMO	905	test cf	HELPD
ABDEN HOUSE	1196032	ELECTRICAL ASSIST CONTRACTOR/CON	905	schedule test 1	HELPD
ABDEN HOUSE	1196031	ELECTRICAL ASSIST CONTRACTOR/CON	905	schedule test	HELPD
▼ Completed (4/4) 0					
CHURCHILL HOUSE	1196059	ELECTRICALIPOWER	801-01	*TEST3* VERIFICATION	CS_CE
INFIRMARY ST,09-11	1196058	ELECTRICALILIGHTING	305-00	*Test* Verification step 2	CS_CE
INFIRMARY ST,09-11	1196048	PLUMBING WASH BASINS/SINKS	305-00	*URG* Sink overflowing as drain is blocked	MS_PO
INFIRMARY ST,09-11	1196042	HEATING ENGINEER/HEATING/VENT	305-00-G.Z06	lvjn;lkdzl	HELPD

If multiple Craftsperson's are assigned, the request status will only change to Complete once all Craftsperson's have set to complete. However, the individual Craftsperson Assignments status will change for each Craftsperson as they complete their request.

	Date Craftsperson		Scheduled Hours	Actual Hours	Doubletime Hours	Overtime Hours		Time	Date			Additional	
Craftsperson	Assigned	Time Craftsperson Assigned					Date Started	Started	Finished	Time Finished	Assignment Status	Comments	
AFM	12/11/2021	09:59	0.00	0.00	0.00	0.00					Complete		×
AGENCY JOINER	12/11/2021	10:00	0.00	0.00	0.00	0.00					Active		×

To review/update details of the work request in order to complete on behalf of a craftsperson, access the Work Request pop up screen.

In the **(C) Craftsperson Section**, the hours and date started can be recorded by selecting the craftsperson entry. This will create pop up screen **Edit Craftsperson** and allow you to update relevant fields (actual hours, date started, and additional comments). You can also

oblem													
	Work Reque	est Code 115	6059					Proble	m Type EL	ECTRICALIP	OWER		
			ST3* VERIFICATI	ION					100000				
	Problem I	ocation											11
More Inform													
<ul> <li>More Inform</li> <li>Reference M</li> </ul>													
	laterial												
Comments													Add
History													
<ul> <li>Trades</li> </ul>													Add
<ul> <li>Craftspersor</li> </ul>													Add
		e Craftsperson					Date	Time	Date	Time	Assignment	Additional	AUG
Traftsperson Assi	igned Assi	gned	Scheduled		Hours Doubletime H		Started	Started	Finished	Finished	Status	Comments	
OBBY LONNIE 11/0	09/2017 14:5	52		0.00	1.00	0.00 0.01	0				Complete		
<ul> <li>Tool Types</li> <li>Tools</li> <li>Other Costs</li> </ul>													Add
<ul><li>Tools</li><li>Other Costs</li></ul>						1.1.15							Add Add
<ul> <li>Tools</li> <li>Other Costs</li> <li>Estimated Cost</li> </ul>	its					Actual Cos							
Tools     Other Costs Estimated Cost Estimated	its ed Cost of Labour 0.00					Actual Cos	Cost of L	abour 23.					
Tools     Other Costs Estimated Cost Estimate Estimate	its ed Cost of Labour 0.00 ited Cost of Parts 0.00						Cost of L Cost of	Parts 0.0	D				
Tools     Other Costs     Estimated Cost     Estimate     Estimate     Estimate     Estimate	ed Cost of Labour 0.00 Inted Cost of Parts 0.00 Inted Cost of Tools 0.00						Cost of L Cost of ost of Other	Parts 0.0	D D				
Tools     Other Costs     Estimated Cost     Estimate     Estimate     Estimate     Estimate     Estimate	its ed Cost of Labour 0.00 ited Cost of Parts 0.00						Cost of L Cost of ost of Other Other	Parts 0.0	D D D				
Tools     Other Costs     Estimated Cost     Estimate     Estimate     Estimat     Estimat     Estimate     Estimate	ad Cost of Labour 0.00 ited Cost of Parts 0.00 ited Cost of Tools 0.00 ited Cost of Tools 0.00 iated Other Costs 0.00 mated Total Cost 0.00						Cost of L Cost of ost of Other Other	Parts 0.0 Parts 0.0 Costs 0.0	D D D				
Tools     Other Costs     Estimated Cost     Estimate     Estimate     Estimate     Estimate     Estimate	et Cost of Labour 0.00 ted Cost of Parts 0.00 ted Cost of Tools 0.00 ated Other Costs 0.00 mated Total Cost 0.00 Request						Cost of L Cost of ost of Other Other	Parts 0.0 Parts 0.0 Costs 0.0 I Cost 23.	D D D 57				
Tools     Other Costs     Estimated Cost     Estimate     Estimate     Estimat     Estimat     Estimate     Estimate	et Cost of Labour 0.00 ted Cost of Parts 0.00 ted Cost of Ports 0.00 ted Other Costs 0.00 mated Total Cost 0.00 tequest Equipment Down						Cost of L Cost of ost of Other Other	Parts 0.0 Parts 0.0 Costs 0.0 I Cost 23.	D D 57 ve Code EL				
Tools     Other Costs     Estimated Cost     Estimate     Estimate     Estimat     Estimat     Estimate     Estimate	ts ad Cost of Labour 0.00 ted Cost of Parts 0.00 ted Cost of Tools 0.00 nated Other Costs 0.00 mated Total Cost 0.00 Cequest Equipment Down Current Equip. meter	reading 0.00	>				Cost of L Cost of ost of Other Other	Parts 0.0 Parts 0.0 Costs 0.0 I Cost 23.	D D 57 ve Code EL	ECT_43 W INSTALL	ATION		
Tools     Other Costs     Estimated Cost     Estimate     Estimate     Estimat     Estimat     Estimate     Estimate	ts ad Cost of Labour 0.00 ted Cost of Parts 0.00 ted Cost of Tools 0.00 nated Other Costs 0.00 mated Total Cost 0.00 Cequest Equipment Down Current Equip. meter	reading 0.00		ew part fitted			Cost of L Cost of ost of Other Other	Parts 0.0 Parts 0.0 Costs 0.0 I Cost 23.	D D 57 ve Code EL		ATION		
Tools     Other Costs     Estimated Cost     Estimate     Estimate     Estimat     Estimat     Estimate     Estimate	ts ad Cost of Labour 0.00 ted Cost of Parts 0.00 ted Cost of Tools 0.00 nated Other Costs 0.00 mated Total Cost 0.00 Cequest Equipment Down Current Equip. meter	reading 0.00	>	ew part fitted			Cost of L Cost of ost of Other Other	Parts 0.0 Parts 0.0 Costs 0.0 I Cost 23.	D D 57 ve Code EL		ATION		Add
Tools     Other Costs     Estimated Cost     Estimate     Estimate     Estimat     Estimat     Estimate     Estimate	ts ad Cost of Labour 0.00 ted Cost of Parts 0.00 ted Cost of Tools 0.00 nated Other Costs 0.00 mated Total Cost 0.00 Cequest Equipment Down Current Equip. meter	reading 0.00	>	ew part fitted			Cost of L Cost of ost of Other Other	Parts 0.0 Parts 0.0 Costs 0.0 I Cost 23.	D D 57 ve Code EL		ATION		
Tools     Other Costs     Estimated Cost     Estimate     Estimate     Estimat     Estimat     Estimate     Estimate	ts ad Cost of Labour 0.00 ted Cost of Parts 0.00 ted Cost of Tools 0.00 nated Other Costs 0.00 mated Total Cost 0.00 Cequest Equipment Down Current Equip. meter	reading 0.00	>	ew part fitted			Cost of L Cost of ost of Other Other	Parts 0.0 Parts 0.0 Costs 0.0 I Cost 23.	D D 57 ve Code EL		ATION		Add
Tools     Other Costs     Estimated Cost     Estimate     Estimate     Estimat     Estimat     Estimate     Estimate	ts ad Cost of Labour 0.00 ted Cost of Parts 0.00 ted Cost of Tools 0.00 nated Other Costs 0.00 mated Total Cost 0.00 Cequest Equipment Down Current Equip. meter	reading 0.00	>	ew part fitted			Cost of L Cost of ost of Other Other	Parts 0.0 Parts 0.0 Costs 0.0 I Cost 23.	D D 57 ve Code EL		ATION		Add
Tools     Other Costs     Estimated Cost     Estimate     Estimate     Estimat     Estimat     Estimate     Estimate	ts ad Cost of Labour 0.00 ted Cost of Parts 0.00 ted Cost of Tools 0.00 nated Other Costs 0.00 mated Total Cost 0.00 Cequest Equipment Down Current Equip. meter	reading 0.00	>	ew part fitted			Cost of L Cost of ost of Other Other	Parts 0.0 Parts 0.0 Costs 0.0 I Cost 23.	D D 57 ve Code EL		ATION		Add
Tools     Other Costs     Estimated Cost     Estimate     Estimate     Estimat     Estimat     Estimate     Estimate	ts ad Cost of Labour 0.00 ted Cost of Parts 0.00 ted Cost of Tools 0.00 nated Other Costs 0.00 mated Total Cost 0.00 Cequest Equipment Down Current Equip. meter	reading 0.00	>	ew part fitted			Cost of L Cost of ost of Other Other	Parts 0.0 Parts 0.0 Costs 0.0 I Cost 23.	D D 57 ve Code EL		ATION		Add
Tools     Other Costs     Estimated Cost     Estimate     Estimate     Estimat     Estimat     Estimate     Estimate	ts ad Cost of Labour 0.00 ted Cost of Parts 0.00 ted Cost of Tools 0.00 nated Other Costs 0.00 mated Total Cost 0.00 Cequest Equipment Down Current Equip. meter	reading 0.00	>	ew part fitted			Cost of L Cost of ost of Other Other	Parts 0.0 Parts 0.0 Costs 0.0 I Cost 23.	D D 57 ve Code EL		ατιον		Add
Tools     Other Costs     Estimated Cost     Estimate     Estimate     Estimat     Estimat     Estimate     Estimate	ts ad Cost of Labour 0.00 ted Cost of Parts 0.00 ted Cost of Tools 0.00 nated Other Costs 0.00 mated Total Cost 0.00 Cequest Equipment Down Current Equip. meter	reading 0.00	>	ew part fitted			Cost of L Cost of ost of Other Other	Parts 0.0 Parts 0.0 Costs 0.0 I Cost 23.	D D 57 ve Code EL		ATION		Add

add another craftsperson using the ADD button.

(**NOTE**: if there have been multiple Craftspeople added to the Work Request, the hours would be recorded for each. Hours should also be recorded for each day attendance was made)

ate Craftsperson Assigned* 11/11/2022	
me Craftsperson Assigned* 14:01 14	:01
Scheduled Hours 0.00	
Actual Hours 0.00	
Doubletime Hours 0.00	
Overtime Hours 0.00	
Date Started	
Time Started	
Date Finished	
Time Finished	
Work Type UnSpecified 🗸	
Assignment Status Active 🗸	
Additional Comments	

Update Request Close

In the Update Work Request section, the **(D)** Cause Code and Repair Type should be recorded.

You can select the Cause Code and Repair Type in two different ways:

Estates Maintenance Helpdesk User Guides

which will start to provide a drop down list to select from

Or

ii) Hovering your mouse over either field will provide an additional **(D) Option.** 

Selecting that option will provide a further **Select Value** pop up screen, with details of all available entries for that field.

Select Value - Cause Code Cause Type Code: E<sup>[7]</sup> All<sup>[7]</sup>

When you have identified the entry<br/>required, clicking on it will select the<br/>chosen option, close the SelectSelect VaValue screen and populate the<br/>details on the Update WorkELECT\_43<br/>ELECT\_44<br/>ELECT\_45<br/>ELECT\_46Request pop up screen.

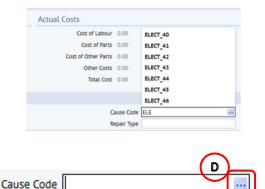
	ELE	8
the Select	ELECT_40	GENERAL - A FAILURE RELATED TO SOME MECHANICAL
	ELECT_41	SHORT CIRCUITING - SHORT CIRCUIT.
nulata tha	ELECT_42	OPEN CIRCUIT - DISCONNECTION, INTERRUPTION, BRO
pulate the	ELECT_43	NO POWER/VOLTAGE - MISSING OR INSUFFICIENT ELEC
' <i>.</i> .	ELECT_44	FAULTY POWER/VOLTAGE - EARTH FAULT, LOW ELECTRI
e Work	ELECT_45	EARTH/ISOLATION FAULT - EARTH FAULT, LOW ELECTR
	ELECT_46	LIGHTING - FAILURE OF A LAMP OR TUBE DUE TO AGE
en.		
		Close

Cause Type Descript

(**NOTE**: Selecting **Close** will return you to the **Update Work Request** screen without copying across any details).

When adding Stock Items to a Work Request through the Building Operations Console the Part Code needs to be selected through the look up rather than typing directly in. To add a new stock item select ADD from the **(E) Parts Section** 

<ul> <li>More Information</li> </ul>		Link New
<ul> <li>Reference Material</li> </ul>		
Comments		Add
History		
Trades		Add
▼ Parts		Add
2000 <u>2</u> 00		
No records to display.		
Craftspersons	Add Part	DX Add
Tool Types		
► Tools	F Part Code*	Add
Other Costs	goantity Estimated 0.000	Add
Estimated Costs	Actual Co	
	Quantity Hand 0.000	
Estimated Cost of Labour 0.00	Quantity Used 0.000	
	Quantity Used 0000	
Estimated Cost of Labour 0.00	Ci	
Estimated Cost of Labour 0.00 Estimated Cost of Parts 0.00	Ci	



From Add Part pop up screen, click on List of Values against **(F) Part Code** . This will then open up the table to Find Parts.

In **(G) Part Code** field type in the stock item you wish to add to Work Request and click on Show

This will bring back all Storage Locations for that Part Code. Select the Storage Location you require

Part Code\* ELE-LAMP-0059

Quantity Estimated 0.000 Storage Location Code ESTKB STORE MAIN Quantity Used 1

Add Part

Н

n x

Save Close

Iter         Show           And Durchsed Parts to Inventor         Storage Location Code         Site Code         Building Code         Quantity Available           Add Purchased Parts to Inventor         Storage Location Code         Site Code         Building Code         Quantity Available           rt Code         File Code         Building Code         Quantity Available         Add Purchased Parts to Inventor           rt Code         File Code         Port Classification         Part Location Code         Code         Units of size =         Units of size =         Units of size =         Units of size =         O           rt Code         Port Classification         Part Description         Strange Location Code         Part Location =         Units of size =         Units of size =         O </th <th>ind Parts</th> <th><u>    (    G   )   </u></th> <th></th> <th></th> <th></th> <th></th> <th></th> <th></th> <th></th> <th></th>	ind Parts	<u>    (    G   )   </u>								
EL.N.P.0059         Constrained Store           art Inventory         Storage Location Map             Add Purchased Parts to Inventor             Add Purchased Parts to	llter								Show	C
ne Repuert Location Que do Que de lo Que de l	Part Code	Part Classifica	tion Part	Description S	torage Location Co	de Site Code	Building Co	ode	Quantity Available	
Aut Newslow         Storage Location Map         Add Purchased Parts to Inventor           nt Ode         EVI ALIN         Page 1 of 1         Add Purchased Parts to Inventor           nt Ode         EVI ALIN         Page 1 of 1         Image 1 of 1         Image 1 of 1           nt Ode         Page 1 of 1         Example         Image 1 of 1         Image 1 of 1           nt Ode         Page 1 of 1         Image 1 of 1         Image 1 of 1         Image 1 of 1           nt Ode         Page 1 of 1         Image 1 of 1         Image 1 of 1         Image 1 of 1         Image 1 of 1           Lealth-Doops         ELECTRICAL         TS 20V 840         ESTEL_STORE_HAIN         -          3500 each         357           Lealth-Doops         ELECTRICAL         TS 20V 840         ESTEL_STORE_HAIN         -          7500 each         357           Lealth-Doops         ELCTRICAL         TS 20V 840         ESTEL_STORE_HAIN         -          7500 each         357           Lealth-Doops         ELCTRICAL         TS 20V 840         ESTEL_STORE_HAIN         -          7500 each         357           Lealth-Doops         ELCTRICAL         TS 20V 840         ESTEL_STORE_HAIN         -          15800 e	ELE-LAMP-0059									
Part Invention         Storage Location Map         Add Purchased Parts to Inventor           Code:         EVELAURN         Page 1 of 1         Inventor         Code         Part Lossification = Part Description         Range Location Code         Part Location         Opention         Opention <t< th=""><th>Work Request Locat</th><th>ion:608-00 💡</th><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th></th></t<>	Work Request Locat	ion:608-00 💡								
nt Code ENI AUIN Page 1 d1 1  Code  Part Classification  Part Description  Part Descripticon  Part Des	Part Inventory	Storage Location Map								
d Code = Pert Cassification = Pert Description = Series Location Code = Location = Pert Location = Quently Areliable = Units of same U UR Cast Average ELAUP-0059 ELECTRICAL TS 28W 840 ESTEL_STORE_HAIN 350.00 each 337 ELAUP-0059 ELECTRICAL TS 28W 840 ESTEL_STORE_HAIN 757.00 each 337 ELAUP-0059 ELECTRICAL TS 28W 840 ESTEL_STORE_HAIN 757.00 each 337 ELAUP-0059 ELECTRICAL TS 28W 840 ESTEL_STORE_HAIN 758.00 each 337 ELAUP-0059 ELECTRICAL TS 28W 840 ESTEL_STORE_HAIN 308.00 each 337 ELAUP-0059 ELECTRICAL TS 28W 840 ESTEL_STORE_HAIN 758.00 each 337 ELAUP-0059 ELECTRICAL TS 28W 840 ESTEL_STORE_HAIN 308.00 each 337 ELAUP-0059 ELECTRICAL TS 28W 840 ESTEL_STORE_HAIN 308.00 each 337 ELAUP-0059 ELECTRICAL TS 28W 840 ESTEL_STORE_HAIN 308.00 each 337 ELAUP-0059 ELECTRICAL TS 28W 840 ESTEL_STORE_HAIN 308.00 each 337 ELAUP-0059 ELECTRICAL TS 28W 840 ESTEL_STORE_HAIN 308.00 each 337 ELAUP-0059 ELECTRICAL TS 28W 840 ESTEL_STORE_HAIN 308.00 each 337 ELAUP-0059 ELECTRICAL TS 28W 840 ESTEL_STORE_HAIN 308.00 each 337 ELAUP-0059 ELECTRICAL TS 28W 840 ESTEL_STORE_HAIN 308.00 each 337 ELAUP-0059 ELECTRICAL TS 28W 840 ESTEL_STORE_HAIN 308.00 each 337 ELAUP-0059 ELECTRICAL TS 28W 840 ESTEL_STORE_HAIN 308.00 each 337 ELAUP-0059 ELECTRICAL TS 28W 840 ESTEL_STORE_HAIN 308.00 each 337 ELAUP-0059 ELECTRICAL TS 28W 840 ESTEL_STORE_HAIN 0.00 each 337 ELAUP-0059 ELECTRICAL TS 28W 840 ESTEL_STORE_HAIN								Add Po	urchased Parts to Invi	entory
ELANP-0059         ELECTRICAL         TS 20V 840         ESTID_STING_HAIN           35.00         each         3.37           ELANP-0059         ELECTRICAL         TS 20V 840         ESTID_STING_HAIN           15.290.0         each         3.37           ELANP-0059         ELECTRICAL         TS 20V 840         ESTID_STING_HAIN           15.290.0         each         3.37           ELANP-0059         ELECTRICAL         TS 20V 840         ESTID_STING_HAIN           138.00         each         3.37           ELANP-0059         ELECTRICAL         TS 20V 840         ESTID_STING_HAIN           138.00         each         3.37           ELANP-0059         ELECTRICAL         TS 20V 840         ESTID_STING_HAIN           138.00         each         3.37           ELANP-0059         ELECTRICAL         TS 20V 840         ESTID_STING_HAIN           130.00         each         3.37		-	Part Description	Storoge Location Code	Location	- Part Location	- Quantity Available -	linite of lesue	Unit Cost Average	
ELAMP-0059         ELECTRICAL         TS 28W M40         ESTRU_STORE_HAIN	un coue		Part Description	Storage cocation code	Location	- Port Locution	Guantity Araitable		Dint Cost Average	
ELAMP-0059         ELECTRICAL         T5 28W 840         ESTCE_STORE_HAIN           1,529.00         exch         3.37           ELAMP-0059         ELECTRICAL         T5 28W 840         ESTH-0_STORE_HAIN           73.00         exch         3.37           ELAMP-0059         ELECTRICAL         T5 28W 840         ESTH-0_STORE_HAIN           138.00         exch         3.37           ELAMP-0059         ELECTRICAL         T5 28W 840         ESTH-0_STORE_HAIN           138.00         exch         3.37           ELAMP-0059         ELECTRICAL         T5 28W 840         ESTH-0_STORE_HAIN           130.00         exch         3.37           ELAMP-0059         ELECTRICAL         T5 28W 840         ESTH-0_STORE_HAIN           0.00         exch         3.37	LE-LAMP-0059	ELECTRICAL	T5 28W 840	ESTBU STORE MAIN			350.00			
E-LA-MP-0059 ELECTRICAL TS 28W 840 ESTING THAIN 138.00 each 3.37 E-LA-MP-0059 ELECTRICAL TS 28W 840 ESTPO STORE HAIN 0.00 each 3.37	LE-LAMP-0059									
E-LAMP-0059 ELECTRICAL TS 26W 840 ESTPO_STORE_MAIN 0.00 each 3.37	LE-LAMP-0059									3.37
	E-LAMP-0059	ELECTRICAL	T5 28W 840	ESTKB_STORE_MAIN			138.00	each		3.37
E-LAMP-0039 ELECTRICAL 75 28W 840 MAIN1.00 each 0.00	LE-LAMP-0059	ELECTRICAL	T5 28W 840	ESTPO_STORE_MAIN			0.00	each		3.37
	LE-LAMP-0059	ELECTRICAL	T5 28W 840	MAIN			-1.00	each		0.00
										Clo

Input **(H) Quantity Used** and then Save. This will assign this Part Code for required Storage Location Code to your Work Request

Comments left by the Craftsperson will appear either in the **(I)** Craftsperson notes, or under Craftsperson Section in the **(J)** Additional Comments field.

<ul> <li>More Information</li> <li>Reference Material</li> <li>Comments</li> <li>History</li> <li>Trades</li> <li>Parts</li> <li>Craftspersons</li> </ul>											L	Add Add Add Add	$\bigcirc$
Date Craftsperson Tim	ne Craftsperson Figned	Scheduled Hours	Actual Hours	Doubletime Hours	Overtime Hours	Date Started	Time Started	Date Finished	Time Finished	Assignment Status	Additional Comments		N.
BOBBY LONNIE 11/09/2017 14:		0.00	1.00	0.00	0.00	510/200	5201200	1 marico	1 manua	Complete	comments		-
<ul> <li>Tool Types</li> <li>Tools</li> <li>Other Costs</li> </ul>												Add Add	)
Estimated Costs					Actual Cos	S							
Estimated Cost of Labour 0.00 Estimated Cost of Parts 0.00 Estimated Cost of Tools 0.00 Estimated Other Costs 0.00 Estimated Total Cost 0.00					Co	Cost of t of Other Other	Parts 0.0 Parts 0.0 Costs 0.0 L Cost 23.	0 0 0					
Update Work Request													
Equipment Down Current Equip. meter		ompleted new par	t fitted					se Code EL		ATION		i.	ĴÛ

When you are back at the Building Operations Console, locate the respective work order you have been updating and select the **(K) Complete** option.

uilding Operations (	Console										1	
										1	Report Problem 🛛 🖻 🔹	**
how 200 Newest Reque	sts 🔻 Building	Floor	Room		Problem Type	More	lear Filter	Recent	Group By State	is 🔹		
0 selected												
Assigned To	Work Team Code	Work Request Code	Problem Type	Location	<ul> <li>Work Description</li> </ul>						Due Date 🚽 Superviso	n 💧
Approved 🔳 (1)												
		3864130	JOINERY DOORS & LOCKS	905	lock not working						AFM(AFM	1)
Issued and In Pro	cess 🗂 (1)										_	
ATL01	HELPDESK	3864141	ELECTRICAL/ELECTRICAL EQUIPMENT	1-01-1.Z01	Electrical Problem Description	in		Hold	Stop U:K	Complete	01/09/2016 ATL01	
Stopped (2)												
ATT01	HD_OPS_CENTRAL	3864140	JOINERY DOORS AND LOCKS	305-00	check door			Close			31/08/2016	
	HELPDESK	3864139	HEATING ENGINEER BOILER	305-00	test cp/stop			Close			30/08/2016	
Completed 🔳 (1	57)											
ATT02	HD_OPS_CENTRAL	3864134	ELECTRICALILIGHTING	5	Light out			Survey ★	Close ⊘		16/08/2016	
ATT02	HD_OPS_CENTRAL	3864132	DECORATION/PAINTING REQUEST	1-03-3.410	test			Survey ★	Close ⊘			
	HELPDESK	3864131	JOINERY DOORS AND LOCKS	3203	key wont work in lock			Survey ★	Close ⊘		15/08/2016	
ATT02	HD_OPS_CENTRAL	3864128	KEYSISUPPLY NEW KEYS	1	new lock locks			Close ⊘				



The system will display a warning pop up screen, select the **(H) Yes** option.

(**NOTE**: Selecting **No** will return you to the **Building Operations Console** screen without taking any action).

The system will complete the Work Request and move it from the **Issued And In Process** status to the **(I) Completed** status section on the Building Operations Console screen pending **Verification**.

#### 1.10 Completing a Work Request – Supervisor

From the **Building Operations Console** screen, locate the specific work request you wish to complete.

(**NOTE**: clicking on the Work Request code will display the **Work Request** pop up screen so you can check details of the work request and confirm it is the one you wish to complete).

Select the (A) Update option.

uildir	ng Operations Co	nsole								•	i
										Report Problem 🛛 🖻 🔹 🤹	* •
how	200 Newest Requests	Building	Floor Room	Probl	em Type More Clear	Filter Rece	nt • Group	By Status	۲		
	0 selected										
	Work Request Code 👝	Problem Type	<ul> <li>Building Name</li> </ul>	Assigned To	Work Description	-				Due Date 🛛 Supervisor	
Req	uested 🔲 (2)										
	3864334	JOINERY CEILINGS	SOUTH GYLE STORE	MAUREEN MASSON	NT 1L					20/09/2016	
	3864306	JOINERY/WINDOWS	KINCAIDS COURT	ATT04	R3 scenario 1j EM					26/09/2016	
Ass	igned to Work (	Order 🔲 (5)									
	3864356	CALL OUT ELECTRICIAN	OLD COLLEGE		CPCPCPCP	Estimate	Schedule	Issue	Cancel	15/10/2016	
	3864312	DECORATION	INFIRMARY ST,09-11	MAUREEN MASSON	CP test	Estimate	Schedule	Issue	Cancel	16/01/2017	
	3864298	ELECTRICALILIGHTING	INFIRMARY ST,09-11		Both lamps have gone out on our wall light	Estimate	Schedule	Issue	Cancel	03/10/2016	
	3864262	HEATING ENGINEER WATER	SMALL ANIMAL AND RIDDELL SWANN	ATT02	R2 scenario 1g	Estimate	Schedule	Issue	Cancel	15/09/2016	
	3864165	ELECTRICALIEMERGENCY LIGHTING	OLD COLLEGE		To fix details	Estimate	Schedule	Issue	5	19/09/2016	
Issu	ued and In Proce	ess 🔲 (10)							(A)		
	3864363	JOINERY SIGNAGE	ALEXANDER GRAHAM BELL BLD	ATT05	HD3 KD 6B	Hold	Stop	Update	te	07/10/2016	
	3864349	ELECTRICALILIFT TRAP	OLD COLLEGE		call point not reset	Hold	Stop	Update	Complete	29/09/2016	
	3864335	ELECTRICALINO HOT WATER	OLD COLLEGE	ATT04	test for drawings on PDF	Hold	Stop	Update	Complete	04/10/2016	
	3864329	PLUMBINGIMETER READINGS	ASCHAM COURT	ATT04	R3 scenario 6b EM	Hold	Stop	Update	Complete	04/10/2016	
	3864260	ELECTRICALI POWER	INFIRMARY ST,09-11	ATT01	test raise wr on mobile	Hold	Stop	Update	Complete	29/09/2016	

The system will display the **Update Work Request** pop up screen.

The details you will need to update can be located in the **(B) Update Work Request** section.

Jpdate Work Request 38641	57			
Problem				
Work Request Code Description Problem Location		Problem Type REECTRICALE/ORTING		
More Information Comments History Trades Parts Craftspersons Tool Types Tools Other Costs			Add Add Add Add Add	1 1 1 1 1 1
Estimated Costs		Actual Costs		
Estimated Cost of Labour 0.00 Estimated Cost of Parts 0.00 Estimated Cost of Tools 0.00 Estimated Other Costs 0.00 Estimated Total (		Cost of Labour 0.00 Cost of Pater 0.00 Cost of Other Pates 0.00 Other Costs 0.00 Totac Cost 0.00		
pdate Work Request				
Equipm Current Equip. meter reading Craftspersons Notes	0.00	Cause Code Repair Type		
		Update Reque	t Close	

You will need to record the (C) Cause Code and Repair Type information.

You can select the Cause Code and Repair Type in two different ways:

i) Typing directly in the Cause Code or Repair type fields, which will start to provide a drop down list to select from

Or

ii) Hovering your mouse over either field will provide an additional (D) Option.

Selecting that option will provide a further Select Value pop up screen, with details of all available entries for that field.

When you have identified the entry required, clicking on it will select the chosen option, close the Select Value screen and populate the details on the Update Work Request pop up screen.

(NOTE: Selecting Close will return you to the Update Work Request screen without copying across any details).

Cause Type Code: E <sup>[7]</sup> All <sup>[7]</sup>		
Cause Type Code	 Cause Type Description	-
ELE		ō
ELECT_40	GENERAL - A FAILURE RELATED TO SOME MECHANICAL	
ELECT_41	SHORT CIRCUITING - SHORT CIRCUIT.	
ELECT_42	OPEN CIRCUIT - DISCONNECTION, INTERRUPTION, BRO	
ELECT_43	NO POWER/VOLTAGE - MISSING OR INSUFFICIENT ELEC	
ELECT_44	FAULTY POWER/VOLTAGE - EARTH FAULT, LOW ELECTRI	
ELECT_45	EARTH/ISOLATION FAULT - EARTH FAULT, LOW ELECTR	
ELECT 46	LIGHTING - FAILURE OF A LAMP OR TUBE DUE TO AGE	

Update Work Request 3864141	
Problem	
Work Request Code 3064141	Problem Type ELECTRICALELECTRICAL EQUIPHENT
Description Electrical Problem Description	
Problem Location A TEST 2	
More Information	0
Comments	Add C
History	0
Trades	Add 40
Parts	Add (C
Craftspersons	Add G
Tool Types	0
► Tools	Add (D
Other Costs	And O
Estimated Costs	Actual Costs
Estimated Cost of Labour 0.00	Cost of Labour 0.00
Estimated Cost of Parts 0.00	Cost of Parts 0.00
Estimated Cost of Tools 0.00	Cost of Other Parts 0.00
Estimated Other Costs 0.00	Other Costs 0.00
Estimated Total Cast 0.00	Total Cost 0.00
Update Work Request	
Equipment Down (Hours) 0.00	Cause Code
Current Equip. meter reading 0.00	Repair Type
Craftspersons Notes	
	-
	Update Request Close





#### Supervisor V1.7

Add (E) Comments confirming the outcome of the Work Request and select the (F) Update Request option

Problem Type ELECTRICALELECTRICAL
EQUIPHENT
Add
ADI
Actual Costs
Cost of Labour 0.00
Cost of Parts 0.00
Cost of Other Parts 0.00
Other Costs 0.00
Tetal Cott 0.00
Cause Code
Repair Type
(F)

This will save the details you have entered, close the pop-up screen and return you to the **Building Operations Console** screen.

When you are back at the Building Operations Console, locate the respective work order you have been updating and select the **(G) Complete** option.

Building Operations G	onsole													
												Report Problem	· · *	**
Show 200 Newest Request	its 👻 Building	Floor	Room		Problem Type	More	Clear	Filter	Recent *	Group By SI	atus 👻			
0 selected	Work Team Code	<ul> <li>Work Request Code</li> </ul>	Problem Type	<ul> <li>Location</li> </ul>	<ul> <li>Work Description</li> </ul>			-				Due Date	Supervisor	
Approved 🔳 (1)														
6		3864130	JOINERY DOORS & LOCKS	905	lock not working								AFM(AFM)	
Issued and In Prod	cess 🗂 (1)									-		_		
ATL01	HELPDESK	3864141	ELECTRICAL EQUIPMEN	1-01-1.Z01	Electrical Problem Descriptio	on		He	old	Stop	Gre Comple	ete 01/09/2016	ATL01	
Stopped 🗆 (2)														
TT01	HD_OPS_CENTRAL	. 3864140	JOINERY DOORS AND LOCKS	305-00	check door			CL	ose			31/08/2016		
	HELPDESK	3864139	HEATING ENGINEER BOILER	305-00	test cp/stop			CL	ose			30/08/2016		
Completed 🔳 (15)	.7)													
ATT02	HD_OPS_CENTRAL	. 3864134	ELECTRICALILIGHTING	5	Light out			Su	irvey ★	Close ⊘		16/08/2016		
TT02	HD_OPS_CENTRAL	3864132	DECORATION PAINTING REQUEST	1-03-3.410	test			Su	irvey ★	Close ⊘				
	HELPDESK	3864131	JOINERY DOORS AND LOCKS	3203	key wont work in lock			Su	irvey ★	Close ⊘		15/08/2016		
TT02	HD_OPS_CENTRAL	3864128	KEYSISUPPLY NEW KEYS	1	new lock locks			CL	ose 🖉					



The system will display a warning pop up screen, select the **(H) Yes** option.

(**NOTE**: Selecting **No** will return you to the **Building Operations Console** screen without taking any action).

The system will complete the Work Request and move it from the **Issued And In Process** status to the **(I) Completed** status section on the Building Operations Console screen pending **Verification**.

Requested (0/2)							
Assigned to Work Order (0/10)							
Issued and In Process (0/162)	( )						
Completed (24/24)	<u> </u>						
INFIRMARY ST.09-11	1196064	ELECTRICALILIGHTING	Light is out	HELPDESK	COLIN PRITCHARD	04/10/2017	Verify
	1196059	ELECTRICALIPOWER	*TEST3* VERIFICATION	CS CENTRAL	BOBBY LONNIE	18/09/2017	(start) A
INFIRMARY ST,09-11	1196058	ELECTRICALILIGHTING	*Test* Verification step 2	CS_CENTRAL	BOBBY LONNIE	18/09/2017	
INFIRMARY ST,09-11	1196048	PLUMBING/WASH BASINS/SINKS	*URG* Sink overflowing as drain is blocked	MS_POLLOCK	BOBBY LONNIE	21/09/2017	
ALCOHOL AND CONSUMABLES STORES	1196030	ELECTRICALIELECTRIC CAR CHARGES	test parts	HELPDESK		21/09/2017	
OLD COLLEGE	1196029	ELECTRICALIASSIST CONTRACTOR/CON	test afm	HELPDESK		21/09/2017	
ABDEN HOUSE	1196025	ELECTRICALIASSIST CONTRACTOR/CON	test parts	HELPDESK		20/09/2017	
VET SCHOOL	1196024	PEST CONTROLIANTS	link wr	HELPDESK	AFM	01/09/2017	
ABDEN HOUSE	1196021	ELECTRICALJELECTRIC CAR CHARGES	test parts	HELPDESK		11/09/2017	
INFIRMARY ST,09-11	1196020	ELECTRICALIGENERATORS	test	HELPDESK		04/09/2017	
HALLS OF RES GENERAL	1196014	PREVENTIVE MAINT		MS_POLLOCK		29/06/2017	
EASTER BUSH VET CTRE	1196011	PREVENTIVE MAINT		MS_BIOQ_EBUSH		29/06/2017	
SOUTH CLERK ST.38	1196009	PREVENTIVE MAINT		MS POLLOCK		26/06/2017	

# 1.11 Verifying a WR

When satisfied the Work Request has been completed with the correct information recorded, you need to filter to show **(K) Pending Steps** and complete **(L) Verify** step.

If the work request has a purchase order attached to it, do not complete the **Verify** step until the final invoice has been uploaded to P&M and Receipted.

uilding Operations Console											
K											
Show Pending Steps V Ste	)	Building	Floor	Problem Type	 More	Clear	Filter	Recent •	Group By	Status	•
							_				
• Assigned to Work Order (0/10)											
Issued and In Process (0/162)											
Completed (24/24)											
CHURCHILL HOUSE	1196059	ELECTRICAL	POWER	*TEST3* VERIFICATION	CS_CENTRA	L	BOBB	LONNIE	18/09/201	17	
INFIRMARY ST,09-11	1196058	ELECTRICAL	LIGHTING	*Test* Verification step 2	CS_CENTRA	L	BOBB	LONNIE	18/09/201	17	- 1
INFIRMARY ST,09-11	1196048	PLUMBING	ASH BASINS/SINKS	*URG* Sink overflowing as drain is blocked	MS_POLLOG	к	BOBB	LONNIE	21/09/201	7	
INFIRMARY ST,09-11	1196042	HEATING EN	GINEER HEATING/VENT	lvjn;lkdzl	HELPDESK		COLIN	PRITCHARD	27/09/201	17	Verify
ALCOHOL AND CONSUMABLES STORES	1196030	ELECTRICAL	ELECTRIC CAR CHARGES	test parts	HELPDESK				21/09/201	17	
OLD COLLEGE	1196029	ELECTRICAL	ASSIST CONTRACTOR/CON	test afm	HELPDESK				21/09/201	17	
ABDEN HOUSE	1196025	ELECTRICAL	ASSIST CONTRACTOR/CON	test parts	HELPDESK				20/09/201	17	
VET SCHOOL	1196024	PEST CONTR	OLIANTS	Unk wr	HELPDESK		AFM		01/09/201	17	
ABDEN HOUSE	1196021	ELECTRICAL	ELECTRIC CAR CHARGES	test parts	HELPDESK				11/09/201	17	
INFIRMARY ST,09-11	1196020	ELECTRICAL	GENERATORS	test	HELPDESK				04/09/201	17	
						v			29/06/201	-	
HALLS OF RES GENERAL	1196014	PREVENTIVE	MAINT		MS_POLLOC	-N			29/00/201	17	

Select (L) Verify button and the Verify Work Request pop up screen displays.

Issued and In Process (0/162)								
Completed (24/24)								
CHURCHILL HOUSE	1196059	ELECTRICALIPOWER	*TEST3* VERIFICATION		CS_CENTRAL	BOBBY LONNIE	18/09/2017	
INFIRMARY ST,09-11	1196058	ELECTRICALILIGHTING	*Test* Verification step 2		CS_CENTRAL	BOBBY LONNIE	18/09/2017	
INFIRMARY ST,09-11	1196048	PLUMBING/WASH BASINS/SINKS	*URG* Sink overflowing a		MC DOLLOCK	DODDY I ONIVIE	31/09/2017	
INFIRMARY ST,09-11	1196042	HEATING ENGINEER/HEATING/VENT	lvjn;lkdzl	Verify Work Re	quest 119604	2	7/09/2017	Verify 🖈
ALCOHOL AND CONSUMABLES STORES	1196030	ELECTRICALIELECTRIC CAR CHARGES	test parts	Comments			1/09/2017	
OLD COLLEGE	1196029	ELECTRICALIASSIST CONTRACTOR/CON	test afm	Comments			1/09/2017	
ABDEN HOUSE	1196025	ELECTRICALIASSIST CONTRACTOR/CON	test parts				10/09/2017	
UVET SCHOOL	1196024	PEST CONTROLIANTS	Link wr		$\sim$		1007-017	
ABDEN HOUSE	1196021	ELECTRICALIELECTRIC CAR CHARGES	test parts	-			1N(201	
INFIRMARY ST,09-11	1196020	ELECTRICALIGENERATORS	test		(M)		4/09/201	
HALLS OF RES GENERAL	1196014	PREVENTIVE MAINT				Confirm Return Incomp	olete	
EASTER BUSH VET CTRE	1196011	PREVENTIVE MAINT			malainooleanau		29/06/2017	
SOUTH CLERK ST,38	1196009	PREVENTIVE MAINT			MS_POLLOCK		26/06/2017	
WARRENDER PK CR,32	1196006	PREVENTIVE MAINT			MS_POLLOCK		23/06/2017	
HALLS OF RES GENERAL	1196004	PREVENTIVE MAINT			MS_POLLOCK		22/06/2017	
SOUTH CLERK ST,38	1195999	PREVENTIVE MAINT			MS_POLLOCK		19/06/2017	
HALLS OF RES GENERAL	1195995	PREVENTIVE MAINT			MS_POLLOCK		15/06/2017	
SOUTH CLERK ST,38	1195990	PREVENTIVE MAINT			MS_POLLOCK		12/06/2017	
HALLS OF RES GENERAL	1195986	PREVENTIVE MAINT			MS_POLLOCK		08/06/2017	
SOUTH CLERK ST,38	1195981	PREVENTIVE MAINT			MS_POLLOCK		05/06/2017	
I JOUNI MOINTYDE CENTRE	4405077	DREVENTRUE MAINT			MS BOLLOCK		05/06/2017	

Add any comments, then to complete the verification step select (M) Confirm.

If the information is incomplete or the job has not been finished you can reject the verification step and return the work request to the Craftsperson select **(N) Return Incomplete**. This will change work request status to Issued you should then confirm the Craftperson assignment status is active

If the work request has a purchase order attached to it, **do not** complete the **Verify** step until the final invoice has been signed off.

(**NOTE**: If there is no purchase order linked to the work request the Verify step can be completed immediately.)

# 1.12 Cancelling a WR

In some circumstances, it may be necessary to cancel a WR, e.g. no longer required or discovered to be duplicate. This can be done at the Assigned to Work Order status only, if the request has already been issued but not yet attended, (therefore no costs associated) then the WR can be returned to the Assigned status in order to cancel, see 1.3.2.Viewing More Information & Returning Work Request.

										Re	eport Problem	Pr 4
All	• Site	Building	Floor	Problem Typ	e More Clear Filter	Recent • Group By Status •						
0 selecte											$\sim$	
Site	<ul> <li>Building Name</li> </ul>	Work Request Code	<ul> <li>Problem Type</li> </ul>	<ul> <li>Location</li> </ul>	Work Description	Work Team Cade Assigned To	<ul> <li>Due Date</li> </ul>				. \	
Assigned to	Work Order (14/1702)										I ]	
CENTRAL	MEDICAL SCHOOL, TEVIOT	1359641	ELECTRICALJAUTOMATIC DOORS	113	*URG* Main doors to doorway 4. People are unab	MS_CENTRAL	12/08/2019	0	Estimate	Schedule	Issue	Cancel
CENTRAL	BRISTO PLACE,19	1359633	JOINERVISHELVING/NOTICE BOARDS	3004-01	*5* 19/2 Bristo Square - Pin board in bedroom 1	MS_CENTRAL	05/08/2019	0	Estimate	Schedule	Issue	Correct
CENTRAL	MEDICAL SCHOOL, TEVIOT	1359628	ELECTRICALILIGHTING	113-01	*15* Doorway 4 - Light out on main stairwell (L	MS_CENTRAL	19/08/2019	0	Estimate	Schedule	Issue	Cancel
CENTRAL	BUCCLEUCH PLACE LANE ACCOM	1359627	JOINERY/WINDOWS	3006	*5* Buccleuch place lane block 5 flat 5 kitche	MS_CENTRAL	05/08/2019	0	Estimate	Schedule	Issue	Cancel
CENTRAL	BUCCLEUCH PLACE LANE ACCOM	1359626	JOINERY/WINDOWS	3006	*5* Buccleuch place lane block 4 flat 1 kitchen	MS_CENTRAL	05/08/2019	0	Estimate	Schedule	Issue	Cancel
CENTRAL	BUCCLEUCH PLACE LANE ACCOM	1359624	ELECTRICALJEXTRACTOR FAN	3006	*5* Buccleuch place lane block 4 flat 1 room 2	MS_CENTRAL	05/08/2019	0	Estimate	Schedule	Issue	Cancel
CENTRAL	CHRYSTAL MACMILLAN BUILDING	5 1359615	PLUMBINGTOILETS	112-01-1.Z06	*URG* CMB- level 1- stainwell 2 side- ladies to	MS_CENTRAL	12/08/2019	0	Estimate	Schedule	Issue	Cancel
CENTRAL	BUCCLEUCH PLACE LANE ACCOM	1359614	JOINERY/WINDOWS	3006	*15* Buccleuch place lane block 5 flat 1 room	MS_CENTRAL	19/08/2019	0	Estimate	Schedule	Issue	Cancel
CENTRAL	BUCCLEUCH PLACE LANE ACCOM	1359613	JOINERY/WINDOWS	3006	*15* Buccleuch place lane block 4 flat 2 room 3	MS_CENTRAL	19/08/2019	0	Estimate	Schedule	Issue	Cancel
CENTRAL	BUCCLEUCH PLACE LANE ACCOM	1359610	JOINERYJBLINDS	3006	*15* Buccleuch place lane block 5 flat 16 room	MS_CENTRAL	19/08/2019	0	Estimate	Schedule	Issue	Cancel
CENTRAL	LIBRARY, GEORGE SQ	1359605	JOINERY DOORS AND LOCKS	2241-L.Z38	*5* lgf Gents Toilet L.Z38. third cubicle door	MS_CENTRAL	05/08/2019	0	Estimate	Schedule	Issue	Cancel
CENTRAL	BAYES CENTRE	1359600	JOINERYJFIXTURES & FITTINGS	285	*15* Could I ask to attach back support in disa	MS_CENTRAL	19/08/2019	0	Estimate	Schedule	Issue	Cancel
CENTRAL	BUCCLEUCH PLACE LANE ACCOM	1359598	JOINERY/WINDOWS	3006	*5* Buccleuch place lane block 5 flat 16 hallwa	MS_CENTRAL	05/08/2019	0	Estimate	Schedule	Issue	Cancel
CENTRAL	EDWARD SALVESON HALL	1359596	ELECTRICALILIGHTING	861	*5* Edward Salvesen room 503, please attend - c	MS_CENTRAL	05/08/2019	0	Estimate	Schedule	Issue	Cancel

Once the WR is at Assigned Status clicking on **(I) CANCEL** will present the Cancel Work Request pop up screen. This is asking for confirmation that you wish to cancel the request. Selecting **(J) Yes** will cancel the request and immediately archives it.



NOTE: Selecting **(K)** No will return you to the Building Operations Console with no changes made.

### **1.12.1 Cancelling Preventative Maintenance Work Requests**

PPM Work Requests which are currently at Issued/Assigned to Work Order Status can now be cancelled by Area Team Leader/Maintenance Planner/Foreman. In order to cancel Work Requests users will require to login to WebCentral **CAD** url using the Generic User details supplied to their area. URL to be used should be:-

https://www.webcentralcad.estates.ed.ac.uk/archibus

For Work Requests which are at Assigned to Work Order the following process should be followed:-

- 1. Work Request requires to be Issued (in order that the Cause Code is available for selection)
- 2. In Comments box enter reason for cancellation
- Select Cause Code for reason WR has been Cancelled see below for list of Cause Codes
- 4. Cancel Work Request

Work Requests at Issued which have to be cancelled require to be checked to see if there are any Craftspersons assigned to them.

For Work Requests which do not have Craftsperson assigned these can be cancelled as follows:-

- 1. In Comments box enter reason for cancellation
- Select Cause Code for reason WR has been Cancelled see below for list of Cause Codes
- 3. Cancel Work Request

For Work Requests which have Craftsperson assigned but no time logged the following process should be followed:-

- 1. Craftsperson should be removed from Work Request
- 2. Craftsperson should then be informed to sync their mobiles to remove this Work Request from their list of WRs
- 3. In Comments box enter reason for cancellation
- 4. Select Cause Code for reason WR has been Cancelled see below for list of Cause Codes
- 5. Cancel Work Request

For Work Requests, which have, Craftsperson assigned and Craftsperson has logged time the Work Request cannot be cancelled. The following message will appear if the Cancel button is selected and the Work Request cannot be Cancelled:-

Message from webpage	×
One or more craftsperson e Work Request cannot be Ca	ntries have labour hours. This ancelled.
	OK Cancel
Cause Type Code	Cause Type Description
COVID19 SHUTDOWN	COVID19 SHUTDOWN
CX PPM-ACCESS	CANCELLED PPM - ACCESS
CX PPM-DUPLICATE	CANCELLED PPM - DUPLICATE
CX PPM-H&S	CANCELLED PPM - HEALTH AND SAFETY
CX PPM-RESOURCE	CANCELLED PPM - RESOURCE

Please note this process should only be followed for Preventive Maint Work Requests and not for Reactive Work Requests

Reactive Work Requests should not be cancelled

### APPENDIX A

## 2.1 Using filter & amending columns - Building Operation Console Screen

### 2.1.1 Using Filters

From the main **Building Operation Console** screen, it is always good practice to ensure you have applied filters before asking the system to display information about your Work Requests.

There are a range of filter options available to you, these help bring back relevant information and allow the system to perform quickly.

The **(A)** Show option will provide a drop down list of generic searches, such as by status or Work Request age.

Choose an option then select the **(B) Filter** option, and the page will show the Work Requests that fall within the selected criteria.

Building Operations Console						
Show 200 Newest Requests Buding 200 Newest Requests Buding Escalated My Requests Requests Requiring My Approval My Approved Requests 200 Oldest Requests 200 Nearing Escalation	Filoor	Room.	Problem Type	Me Bas Fiber Rece	ent • Group By Status	•

There are a range of filters by (C) Location & Work Type

Selecting the **(D) More** option offers a search on a wider range of Work Request information, such as date or assigned craftsperson.

10w 200 Newest Reques	ts ▼ Building		Floor	Room		Problen	n Type			More	Clear Filter	Recent •	Group By S	itatus
ding Operations Cons	ole													<b>1</b> 4
													Report Problem	<u></u> ⊡• ☆•
w 200 Newest Requests •	Building	Floor		Room	Problem Type		Less	Clear	Filter	Recent *	Group By Sta	us 🔻		
	Building		rtment	Room Requestor	Problem Type		Less	Clear	Filter	Recent *	Group By Sta	us 🔻		
			rtment		Work Type Both	•	Less	Clear	Filter	Recent *	Group By Sta	us 🔸		
	Division	Depa Equip	rtment	Requestor			Less	Clear	Filter	Recent *	Group By Sta	us 🔹		
	Division Equipment Standard	Depai Equip Date	rtment oment	Requestor Description	Work Type Both		Less	Clear	Filter	Recent *	Group By Sta	us 👻		
	Division Equipment Standard Date Requested From	Depai Equip Date Crafts	rtment oment. Requested To sperson	Requestor Description Work Request Code	Work Type Both Work Order Code Date to Perform To		Less	Clear	Filter	Recent *	Group By Sta	us 👻		
	Division Equipment Standard Date Requested From Work Team	Depai Equip Date Crafts	rtment oment Requested To sperson stimation Status 🕅	Requestor Description Work Request Code Date to Perform From	Work Type Both Work Order Code Date to Perform To		Less	Clear	Filter	Recent *	Group By Sta	ນຮ 🔻		

Supervisor V1.7

You can select information for the different fields in two different ways:

i) Typing directly in any fields, which will start to provide a drop down list to select from

#### Or

ii) Hovering your mouse over either field will provide an additional (E) Option.

Selecting that option will provide a further **Select Value** pop up screen, with details of all available entries for that field.

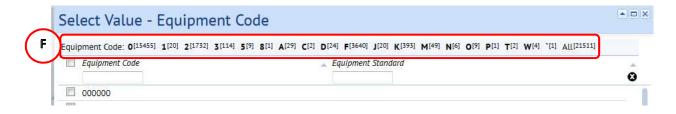
When you have identified the entry required, clicking on it will select the chosen option, close the **Select Value** screen and populate the details on the main screen.

You can search on more than one item, by selecting one or more of the tick boxes to the left of an option.

(**NOTE**: Selecting **Close** will return you to the previous screen without copying across any details. Selecting **Clear** will remove any options ticked for selection and default to the 200 Newest Work Requests).

Some Select Value pop up screens may also contain an additional search function.

Selecting one of the **(F) Number/ Letter** options at the top of the **Select Value** pop up screen will narrow the display to only show items that start with that number/ letter.



After selection of an individual Number/ Letter option to return to the original list, select the **(G) Up** option.

•	butterg	Fou	Room	Problem Type		Less	4
	Origina	Department	Repetter				
	Equipment Standard	Equipment.	Description	Work Type Both			
	Date Requested from	Date Requested To	Work Request Cride	Work Order Code			
	vox ten	R 1	Date to Perform From	Date to Perform To	80		
	Part Estimated Cost	STEVE NOSS STEVEN GRAHAM	ox Nat Reserved 🗄 Nat in Stoc	Reserved			
	Wark Request Status Approved Assign Stopped On He		Planty 1 1 2 2 3 3 4 5 5		Escalaraet? []	1	
		STUART WRIGHT					

Craftsperson	E
Select Value - Craftsperson	
Curtagerson Googy 274 (274 (274 (274 (274 (274 (274 (274	the first first first first man man man inter its
Will will Agilled El Cratageour Cale	
an Adabase res	
IZ JONATHAN HUNKO	
E IDIGTHIN LAHE	
E JOHN ROBLICSON	
E ID-N HILLARRY	
E JOIN HAREN	
E JOHN HACKHON	
E ION HARLOY	
E JOHN DOORRTY	
E ION CORSON	
E JOHN CONNER	
E Instrument	
E IPA MA	
E INNARIA	
E INNAMEN	
E INNY CLIMESS	
E INNOUT	
E JH CUPHING	
Not all records are shown.	
	Case Save Selected Coor
	Case Save Selected Clear

Sel	ect Value - Equipment Code		
Equip			
	Equipment Code	Equipment Standard	Ô
	NCMONITOR1	MONITOR	
	NCMONITOR2	MONITOR	
	NCOHP1	OHP	

## 2.1.2 Sorting Column & fields

You can also sort information to arrange information to display by field, for example, sort work requests by their due date or works currently assigned to Craftsperson

To sort click on the small box next to the subject column you wish to sort by for example Craftsperson, select the box **(A)** to the Right of the **Assigned To** column

										Rep		n 🖻 • •
how All	▼ Site	💀 Building	Floor	n Problem Typ	e 🔜 More Clear Filter Recent	Group By St						
							(A)					
0 selected								_				
🔲 Site 👝 Buildi	ing Name	Work Request Code	Problem Type	<ul> <li>Location</li> </ul>	Work Description	<ul> <li>Work Team Code</li> </ul>	<ul> <li>Assigned To</li> </ul>	Doe Work Requested	🗸 Due Date 🍵 No. cf 🝵 Repair Type			
Assigned to Wo	ork Order (0/47) 💷						_					
Issued and In P	rocess (51/262)											
CENTRAL BRIST	O PLACE,19	1360385	JOINERY/WINDOWS	3004-02	*URG* 19/8 Bristo Place The window in the kitc	MS CENTRAL	DOUGIE RODGERS	02/08/2019	16/08/2019 1	Hold	Update	Complet
CENTRAL WGH	IGMM WEST & CENTRE BLDGS (HGU)	1360382	ELECTRICALILIGHTING	2302-00-CG.19	*URG* Lights are not working in Yamuna fish room.	MS CENTRAL	DAVID ROCHES	02/08/2019	16/08/2019 1	Hold	Update	Complet
CENTRAL LIBRA	RY, GEORGE SQ	1360375	JOINERY DOORS AND LOCKS	224-00-G.Z14	*URG* G.Z14 Accessible Toilet Door Lock in the	MS_CENTRAL	WILLIAM POTTINGE	02/08/2019	16/08/2019 1	Hold	Update	Complet
CENTRAL ALISO	IN HOUSE	1360337	ELECTRICALIPOWER	110-01-1.01	*URG* Alison House - Room 1.01 - Student plugge	MS_CENTRAL	NEIL WATSON	02/08/2019	16/08/2019 1	Hold	Update	Comple
CENTRAL APPLI	ETON TOWER	1360329	PLUMBING[INVESTIGATE SMELL	201-00	*5* HI guys sewage smell coming fro a cupboard	MS_CENTRAL	JAKE MASON	02/08/2019	09/08/2019 1	Hold	Update	Comple
CENTRAL APPLI	TON TOWER	1360327	JOINERY/DOORS AND LOCKS	2011-B.Z04	*URG* DORMA REQUIRED - MECHANISM ON DOOR CLOSER	MS_CENTRAL	DOUGIE RODGERS	02/08/2019	16/08/2019 2 MISCELLANEOUS	Hold	Update	Comple
CENTRAL ALISO	IN HOUSE	1360324	ELECTRICALILIGHTING	1101-8.01	*5* Corridor in basement outside room 8.01 3 li	MS_CENTRAL	GORDON MCDOUGALD	02/08/2019	09/08/2019 1	Hold	Update	Comple
CENTRAL BAYE	5 CENTRE	1360322	ELECTRICALILIGHTING	2851-B.Z06	*5* Cleaners cupboard in basement B.206 light o	MS_CENTRAL	BILLY THOMPSON	02/08/2019	09/08/2019 1	Hold	Update	Comple
CENTRAL INFO	RMATICS	1360316	PLUMBINGTAPS	282-01-1.35	**15* It has been reported that the tap in 1.35	MS_CENTRAL	GRAHAM SIMPSON	02/08/2019	23/08/2019 1	Hold	Update	Comple
CENTRAL GEOR	GE SQUARE, 50	1360285	PLUMBING[TOILETS	227-04-4.Z16	*5* The urinal in the 4th floor (nearest the do	MS_CENTRAL	JAKE MASON	01/08/2019	08/08/2019 1	Hold	Update	Comple
CENTRAL APPLI	ETON TOWER	1360282	ELECTRICALILIGHTING	201-05-5.05	*EXAM* *BY 05/08/19* Appleton Tower Computer La	MS_CENTRAL	GORDON MCDOUGALD	01/08/2019	05/12/2019 1	Hold	Update	Comple
CENTRAL PATRI	CK GEDDES HALL	1360271	ELECTRICALILIGHTING	860	*5* Patrick Geddess 207-210 bedroom 207, ceilin	MS_CENTRAL	NEIL WATSON	01/08/2019	08/08/2019 1	Hold	Update	Comple
CENTRAL ECAN	AIN BUILDING	1360267	PLUMBING[INVESTIGATE DAMP	421-02	*5* Main Building - C floor - Section of the ex	MS_CENTRAL	GRAHAM SIMPSON	01/08/2019	08/08/2019 1	Hold	Update	Comple
CENTRAL NORT	H-EAST STUDIO BUILDING	1360266	PLUMBING[EXTERNAL DRAINAGE	422-05	*5* North East Studio Building - L Floor - Outs	MS_CENTRAL	GRAHAM SIMPSON	01/08/2019	08/08/2019 1	Hold	Update	Comple
CENTRAL BUCC	LEUCH PLACE,30	1360245	JOINERY/FIXTURES & FITTINGS	260	*RECHARGE* We have five wall screen brackets th	MS_CENTRAL	CRAIG FLEMING	01/08/2019	05/12/2019 1	Hold	Update	Comple
CENTRAL BAYE	5 CENTRE	1360235	ELECTRICAL SOCKETS/PORTS/SWITCHE	285	*5* Could I ask to check the power in the floor	MS_CENTRAL	NEIL WATSON	01/08/2019	08/08/2019 1	Hold	Update	Comple
CENTRAL BUCC	LEUCH PLACE,01 - 13	1360229	JOINERY[DOORS AND LOCKS	231	*5* *HMO* Linked wr - 2 3f1 Buccleuch Place Ba	MS_CENTRAL	WILLIAM POTTINGE	01/08/2019	08/08/2019 1	Hold	Update	Comple
CENTRAL WGH	IGMM NORTH BLDG (MMC)	1360228	HEATING ENGINEERIAIR CONDITION	2318-01-N1.07	*5* N1.07 Side lab off main lab - Aircon unit h	MS_CENTRAL	GARY WALLS	01/08/2019	08/08/2019 1	Hold	Update	Comple
CENTRAL POTT	ERROW - CHAPLAINCY	1360224	HEATING ENGINEER/WATER	108-00-G.Z04	*5* Customer complaints that the water temperat	MS_CENTRAL	CRAIG CUMMING	01/08/2019	08/08/2019 3	Hold	Update	Comple
CENTRAL BUCC	LEUCH PLACE,01 - 13	1360207	JOINERY/DOORS AND LOCKS	231	*5* *HMO* Linked wr - 2 2f1 Buccleuch Place bed	MS_CENTRAL	DOUGIE RODGERS	01/08/2019	08/08/2019 1	Hold	Update	Comple
CENTRAL BUCC	LEUCH PLACE,01 - 13	1360206	JOINERY[DOORS AND LOCKS	231	*5* *HMO* Linked wr - 2 3f2 Buccleuch Place kit	MS_CENTRAL	WILLIAM POTTINGE	01/08/2019	08/08/2019 1	Hold	Update	Comple
CENTRAL BUCC	LEUCH PLACE,01 - 13	1360205	JOINERY/DOORS AND LOCKS	231	*5* *HMO* Linked wr - 3a Buccleuch Place hall c	MS_CENTRAL	STUART WRIGHT	01/08/2019	08/08/2019 1	Hold	Update	Comple
CENTRAL BUCC	LEUCH PLACE,01 - 13	1360203	JOINERY/DOORS AND LOCKS	231	*5* *HMO* 1 Buccleuch Place bathroom C, linked	MS_CENTRAL	WILLIAM POTTINGE	01/08/2019	08/08/2019 1	Hold	Update	Comple
CENTRAL BUCC	LEUCH STREET,12	1360199	PLUMBING[INVESTIGATE DAMP	268-02	**15* 12/4 Buccleuch Street 2FR Investigate dam	MS_CENTRAL	BEN HARRIS	01/08/2019	22/08/2019 1	Hold	Update	Comple
CENTRAL GEOR	GE SQ.01(NEUROSCIENCE	1360192	ELECTRICALILIGHTING	208-05	*5* There are two lights out in this room. One	MS_CENTRAL	NEIL WATSON	01/08/2019	08/08/2019 1	Hold	Update	Comple
CENTRAL WGH	6Q WTRCF (CLINICAL)	1360191	HEATING ENGINEERIAIR CONDITION	2328	*5* G/F Reception Air con is not working G/F Re	MS_CENTRAL	GARY WALLS	01/08/2019	08/08/2019 1	Hold	Update	Comple
CENTRAL WGH	IGMM SOUTH BLDG (CAN RES)	1360157	HEATING ENGINEER/HEATING/VENT	2326-02-52.15	**15* Rhythmical irritating noise coming from c	MS_CENTRAL	GARY WALLS	01/08/2019	22/08/2019 1	Hold	Update	Comple
CENTRAL BUCC	LEUCH PLACE,21	1360154	PLUMBING[TOILETS	251-03-3.Z2	*5* 21 BP 3rd floor - hi, toilet seat is broken	MS_CENTRAL	JAKE MASON	01/08/2019	08/08/2019 1	Hold	Update	Comple
CENTRAL THE	JOE BUSINESS SCHOOL	1360150	PLUMBING/WASH BASINS/SINKS	226-01-1.Z17	"5" HI in the 1st floor ladies tollet sinks are	MS_CENTRAL	JAKE MASON	01/08/2019	08/08/2019 1	Hold	Update	Comple
CENTRAL THE	JOE BUSINESS SCHOOL	1360148	ELECTRICALILIGHTING	226-01-1.Z22	*5* HI, the staff tollet on level 1 doesn't hav	MS_CENTRAL	BILLY THOMPSON	01/08/2019	08/08/2019 1	Hold	Update	Comple
CENTRAL WGH	18 TRANSGENIC BLDG (EVANS)	1360134	HEATING ENGINEERICALORIFIERS	2327	*15* Replace PHX 2 high limit valve at Evans bu	MS_CENTRAL	GARY WALLS	01/08/2019	22/08/2019 1	Hold	Update	Comple
CENTRAL GEOR	GE SOLIARE SO	1360127	IOINERVIDODRS AND LOCKS	227-00-G.Z01	** Dorma required PO 405432 ** *URG* *31/07	MS CENTRAL	KAREN BRECHIN	01/08/2019	15/08/2019 1	Hold	Update	Comple

The information will then sort to show works requests grouped by Craftsperson the works request has been assigned to **(B)**, if you click again it will sort by reverse

#### Estates Maintenance Helpdesk User Guides

											Re	port Proble	m ⊵•
All	▼ Site	Building	Floor	Probl	lem Type More Clear Filter	Recent •	Group By Status						
0 selected								B					
Site E	Rulldian Name	Work Request Code	Problem Time	Location	Work Description	Wark Team Cos	Assigned To	Date Work Requested	- Duo Data - No.	of _ Read's Tupe			
		Work Replace Code	Problem type	<ul> <li>LOCOLION</li> </ul>	<ul> <li>Work Description</li> </ul>	<ul> <li>Work return Cot</li> </ul>	<ul> <li>Assigned to</li> </ul>	<ul> <li>Dote work Requested</li> </ul>	Due Dute - Hoto	i) 🖶 webuti iyipe	•		
	Work Order (0/47)  n Process (51/262)												
CENTRAL I	NFORMATICS	1359291	CALL OUT[HEATING ENGINEER	282	High Temperature Chilled Water Informatics Foru	MS_CENTRAL	ALAN ORR	25/07/2019	24/08/2019 1		Hold	Update	Comple
CENTRAL L	IBRARY, GEORGE SQ	1359280	CALL OUT HEATING ENGINEER	224	Chillbeams are dripping with water on to the fl	MS_CENTRAL	ALAN ORR	25/07/2019	24/08/2019 1		Hold	Update	Comple
CENTRAL B	BUCCLEUCH STREET,12	1360199	PLUMBINGINVESTIGATE DAMP	268-02	**15* 12/4 Buccleuch Street 2FR Investigate dam	MS_CENTRAL	BEN HARRIS	01/08/2019	22/08/2019 1		Hold	Update	Compl
CENTRAL T	TEVIOT PLACE, 17	1359693	PLUMBING/WASH BASINS/SINKS	3020	*5* 17/5 Teviot Place - Please note tenant stat	MS_CENTRAL	BEN HARRIS	29/07/2019	05/08/2019 1		Hold	Update	Compl
CENTRAL P	POTTERROW - CHAPLAINCY	1359640	PLUMDING/TOILETS	108-00	**5* Toilet seats has come off in Ladies Toilet	MS_CENTRAL	DEN HARRIS	29/07/2019	05/08/2019 1		Hold	Update	Compl
CENTRAL A	ASCHAM COURT	1359594	PLUMBINGISHOWERS	3253	*5* house 13 ground floor shower blocked	MS_CENTRAL	BEN HARRIS	29/07/2019	05/08/2019 1		Hold	Update	Comp
CENTRAL A	ASCHAM COURT	1359574	PLUMBINGISHOWERS	3253	**15* Flat 14 downstairs shower sealant needs t	MS_CENTRAL	BEN HARRIS	29/07/2019	19/08/2019 1		Hold	Update	Comp
CENTRAL N	NEW COLLEGE	1359229	PLUMBINGJEXTERNAL DRAINAGE	401	*5* We have a problem with rainwater backing up	MS_CENTRAL	BEN HARRIS	25/07/2019	01/08/2019 1		Hold	Update	Comp
CENTRAL R	ROYAL MED SOCIETY	1358752	PLUMBING/TOILETS	3251	*15* Royal med society - the right hand side to	MS_CENTRAL	BEN HARRIS	23/07/2019	13/08/2019 1		Hold	Update	Compl
CENTRAL E	ECA MAIN BUILDING	1358603	PLUMBING[TOILETS	421-01-B.51	*5* ECA Main Building - B.51 Basement Ladies to	MS_CENTRAL	BEN HARRIS	23/07/2019	30/07/2019 1		Hold	Update	Comp
CENTRAL L	AURISTON FIRE STATION	1358602	PLUMBINGTOILETS	426-02-2/Z17	*5* ECA Fire Station - 2.Z17 ladies toilet The	MS_CENTRAL	BEN HARRIS	23/07/2019	30/07/2019 1		Hold	Update	Comp
CENTRAL G	SEORGE SQ.01(NEUROSCIENCE	1354614	PLUMBINGTOILETS	208-04-4.27	*5* Hello the toilet nearest the sinks in the 4	MS_CENTRAL	BEN HARRIS	10/07/2019	17/07/2019 1		Hold	Update	Comp
CENTRAL A	ASCHAM COURT	1352647	PLUMBING/WASH BASINS/SINKS	3253	*15* house 8 room 3 room sink reseal	MS_CENTRAL	BEN HARRIS	26/06/2019	17/07/2019 1		Hold	Update	Comp
CENTRAL L	IBRARY, GEORGE SQ	1360040	PLUMBING[TAPS	224-02-2.227	*15* 2.Z27 For Ben - Please replace grating and	MS_CENTRAL	BEN HARRIS	31/07/2019	21/08/2019 2		Hold	Update	Compl
CENTRAL A	ASCHAM COURT	1358747	JOINERYJFIXTURES & FITTINGS	3253	House 10 - Please fit new shower screen as disc	MS_CENTRAL	BEN HARRIS	23/07/2019	26/11/2019 2		Hold	Update	Compl
CENTRAL D	DUGALD STEWART BUILDING	1335297	PLUMBING/LEAK	283-01-1.10	"URG" There is a leak at street level below roo	MS_CENTRAL	BEN HARRIS	22/04/2019	06/05/2019 3	MISCELLANEOUS	Hold	Update	Compl
CENTRAL H	HUGH ROBSON BUILDING	1359664	HEATING ENGINEER/WATER	2101-B.Z02	*5* Water ingress into the basement plantroom a	MS_CENTRAL	BILLY MCARTHUR	29/07/2019	05/08/2019 4		Hold	Update	Compl
CENTRAL E	CA MAIN BUILDING	1352957	ELECTRICALJEMERGENCY LIGHTING	421	FAO Compliance Team Please renumber the emergen	MS_CENTRAL	BILLY MCARTHUR	28/06/2019	01/11/2019 2		Hold	Update	Compl
CENTRAL B	BAYES CENTRE	1360322	ELECTRICALILIGHTING	2851-B.Z06	*5* Cleaners cupboard in basement B.Z06 light o	MS_CENTRAL	BILLY THOMPSON	02/08/2019	09/08/2019 1		Hold	Update	Compl
CENTRAL T	THE UDE BUSINESS SCHOOL	1360148	ELECTRICAL/LIGHTING	226-01-1.222	*5* Hi, the staff toilet on level 1 doesn't hav	MS_CENTRAL	BILLY THOMPSON	01/08/2019	08/08/2019 1		Hold	Update	Compl
CENTRAL C	HRYSTAL MACMILLAN BUILDING	1360090	ELECTRICAL SOCKETS/PORTS/SWITCHE	112-01	*15* CMB 1st FL corridor, b/w Rm 1.04 and 1.05	MS_CENTRAL	BILLY THOMPSON	31/07/2019	21/08/2019 1		Hold	Update	Compl
CENTRAL C	HRYSTAL MACMILLAN BUILDING	1359955	ELECTRICAL/LIGHTING	112	*EXAM* *BY 05/08/19* CMB Seminar Room 1/2-0	MS_CENTRAL	BILLY THOMPSON	31/07/2019	04/12/2019 1		Hold	Update	Compl
CENTRAL C	THRYSTAL MACMILLAN BUILDING	1359800	ELECTRICALILIGHTING	112-00	*15* One of the pendant light bulbs above the c	MS_CENTRAL	BILLY THOMPSON	30/07/2019	20/08/2019 1		Hold	Update	Compl
CENTRAL G	SEORGE SQUARE, 50	1359677	ELECTRICAL LIGHTING	227-01-1.12	*15* The lights in Room 1.12 cannot be switched	MS_CENTRAL	BILLY THOMPSON	29/07/2019	19/08/2019 1		Hold	Update	Compl
CENTRAL G	SEORGE SQUARE, 50	1359674	ELECTRICAL/LIGHTING	227-01	*15* A section of the perimeter lights is out i	MS_CENTRAL	BILLY THOMPSON	29/07/2019	19/08/2019 1		Hold	Update	Compl
CENTRAL T	THE UGE BUSINESS SCHOOL	1359366	ELECTRICALJEMERGENCY LIGHTING	226	*15* faults,8,621,660,668,692,712,724,	MS_CENTRAL	BILLY THOMPSON	26/07/2019	16/08/2019 1	REPAIR EMERGENCY LIGHT	Hold	Update	Compl
CENTRAL L	IBRARY ANNEXE 2	1359227	ELECTRICAL JEMERGENCY LIGHTING	935	*15* repair faults as per spreadsheet	MS_CENTRAL	BILLY THOMPSON	25/07/2019	15/08/2019 1		Hold	Update	Compl
CENTRAL G	SEORGE SQUARE, 50	1352998	ELECTRICALISOCKETS/PORTS/SWITCHE	227-01-1.06A	*15* Little room on the left of 1.06 Can we hav	MS_CENTRAL	BILLY THOMPSON	28/06/2019	19/07/2019 1		Hold	Update	Compl
CENTRAL H	HOPE PARK SQ,08	1347855	ELECTRICALILIGHTING	3025-00	*15* Please replace light in living room with a	MS_CENTRAL	BILLY THOMPSON	12/06/2019	03/07/2019 1		Hold	Update	Compl
CENTRAL R	RIEGO STREET	1359656	ELECTRICALILIGHTING	3184	*15* block 13 3rd floor stair lights flickering	MS_CENTRAL	CONNER CARMICHAE	29/07/2019	19/08/2019 1		Hold	Update	Compl
CENTRAL E	DWARD SALVESON HALL	1359596	ELECTRICALILIGHTING	861	*5* Edward Salvesen room 503, please attend - c	MS_CENTRAL	CONNER CARMICHAE	29/07/2019	05/08/2019 1		Hold	Update	Compl
CENTRAL E	CA HUNTER BUILDING	1359588	ELECTRICALILIGHTING	423-00-N.33	*15* ECA Hunter - N.33 The light is flickering	MS CENTRAL	CONNER CARMICHAE	29/07/2019	19/08/2019 1		Hold	Update	Compl

### 2.1.3 Using the Group By Option

Having applied the necessary filters and the system has displayed the relevant work requests, you can also amend how the records are grouped.

As a Customer, you will be able to group the records be either the Work Request Status or by Problem Type.

Selecting the **(A) Grouped By** option will display an option list, for you to choose a relevant option.

uilding Operations Co									8	
						$\sim$		Report	t Problem 🛛 🖻 🔹 🖯	₩•
how 200 Newest Requests	Building     Floor	Roo	om Problem Type		More Clear Filt	er Rece	Group By Problem 1	Туре 💌		
0 selected						$\cup$				
Work Request Code	<ul> <li>Problem Type</li> </ul>	<ul> <li>Location</li> </ul>	<ul> <li>Work Description</li> </ul>	-				Due Date	<ul> <li>Work Order</li> </ul>	
Assigned to Work	Order 🔟 <sup>(2)</sup>									
3864148	EXTERNAL DOORSJUNSECURE	1-03-3.413	Door not locking	Estimate	Schedule	Issue	Cancel	26/08/2016	3864139	
3864147	ELECTRICALIGENERATORS	1-05-5.Z1	not working as expected	Estimate	Schedule	Issue	Cancel	26/08/2016	3864140	
Issued and In Proce	ess 🔲 (3)									
3864149	JOINERY/FIXTURES & FITTINGS	1-02-2.243B	Coming away from the wall	Hold	Stop	Update	Complete	02/09/2016	3864137	
3864145	ELECTRICALI POWER	11-B.01	Plug socket not working	Hold	Stop	Update	Complete	02/09/2016	3864136	
3864142	FIRE SAFETYJEVAC SIGNAGE	11-B.01	Electrical Problem Description	Hold	Stop	Update	Complete	01/09/2016	3864134	
Stopped 🗂 (1)										
3864140	JOINERY DOORS AND LOCKS	305-00	check door	Close				31/08/2016	3864132	
Completed 🔳 (2)										
3864150	CLEANINGIBLOOD	1	Test Work Request Primary Trade	Close				19/08/2016	3864138	
3864141	ELECTRICAL ELECTRICAL EQUIPMENT	1-01-1.Z01	Electrical Problem Description	Close ⊘				01/09/2016	3864133	

The system will re-group the records by the selected option.

#### Estates Maintenance Helpdesk User Guides

5how 200 Newest Requests 👻 E	uilding	Floor	Room	Problem Type	More Clear Filt	er Recent • Group	By Problem Type 💌
0 selected	<ul> <li>Location</li> </ul>	Work Descrip	tion	_	Due Date	<ul> <li>Supervisor</li> </ul>	<ul> <li>Status</li> </ul>
BLINDS/CURTAINSINE	W INSTALLATION	1 🔲 (1)					
3864151	201-02-2.10	test to see if	leaving UYAWL tick box ticked, u		16/12/2016		Requested
CALL OUT PLUMBER	(1)						
3864153	11-B.07	billy bob rec	uested to attend 2000hrs		15/09/2016		Issued and In Process
CLEANING BLOOD	(1)						
3864150	1	Test Work Re	quest Primary Trade		19/08/2016	ATL01	Completed
CLEANING CARPET SH	AMPOO 🗖 (2)						
3864155	1-00-G.103	Carpet stain	ed due to leakage		21/12/2016	ATL01	Completed
3864154	1-01-1.286	Carpet heav	ly stained		21/12/2016	ATL01	Completed
CONTRACTOR (1)							
3863884	329-01-1.21	Faulty drain	(KD 1c)		25/07/2016	AFM(AFM)	Approved
CONTRACTORIDECOR							
3863906	6201	NT 4C				AFM(AFM)	Approved
DECORATION	AL 🔲 (1)						
3864152	11-B.01C	White paint	please		19/12/2016		Requested
ELECTRICAL POWER	(2)						
3864146	11-B.02A	Power out			02/09/2016		Requested
3864145	11-B.01	Plug socket	not working		02/09/2016	ATL01	Issued and In Process
ELECTRICAL	AL EQUIPMENT	(2)					
3864158	1	please supp	y and test new electrical equipment.		08/09/2016		Assigned to Work Order
3864141	1-01-1.Z01	Electrical Pr	oblem Description		01/09/2016	ATL01	Completed

Update Cancel

#### 2.1.4 Amending Columns - Building Operations Console

Having applied the necessary filters and the system has displayed the relevant work requests, you can also amend the columns displayed depending on your role.

For example, as an area team leader, including details of who the work has been assigned to may help you assess your team's availability.

	CUST01 🔻	Sign Out Help
	Find a form or rep	ort
Selecting the <b>(A) Edit</b> icon will display an option list, choose the <b>Select Work Request Fields</b> option.	Report Prob	
	Select Work Request F Display Two Lines for N Highlight escalated rec	Work Request Description
	Select Fields	
The system will display a <b>Select Fields</b> pop up screen.	Available Fields: Requested by Work Team Code	Visible Fields: Work Request Code Problem Type
The left hand column will show all available fields, while the right hand column will show the selected fields already displayed on your Building Operations Console.	Assigned To Supervisor Status PM Procedure PM Schedule Code Division Department Site Building Building Building Floor Room	Location Work Description Action1 Action2 Action3 Action4 Action5 Due Date Work Order

To add an item to your display, highlight it, and then select the **(B) Show** option.

To save your preferred console setup select (C) icon, and confirm yes.

			Find a form or report	1 či (1)
Filter Recent •	Group By State	JS V		
Date Work Requested	Due Date		Escalated for Completion?	
Date Work Requested	Due Date		Escalated for Completion?	•
Date Work Requested 13/09/2016	<ul> <li>Due Date</li> <li>04/10/2016</li> </ul>	Approve	Escalated for Completion?	•
13/09/2016	04/10/2016		No	
13/09/2016 12/09/2016	04/10/2016 26/09/2016	Approve	No	
13/09/2016 12/09/2016 15/09/2016	04/10/2016 26/09/2016 19/01/2017	Approve 🗙	No No No	

The selected item will move from the left hand column into the right hand column.

You can also change the order the new item appears on the Building Operations Console screen by moving it **(C) Up** or **Down**.

To make something appear further to the left on the Building Operations Console screen, move it higher up the list. Alternatively, to appear further to the right, move it lower down the list.

When you have amended the visible fields, select the **(D) Update** option, which will save the options selected, close the **Select Fields** pop up screen

Available Fields:		Visible Fields:	
Requested by Work Team Code Supervisor Status PM Procedure PM Schedule Code Division Department Site Building Building Name Floor Room Equipment Division	ж ш	Work Request Code Problem Type Location Work Description Action1 Action2 Action3 Action4 Action5 Due Date Work Order Assigned To	
Show		C Up Down	Cancel

and return you to the Building Operations Console screen.

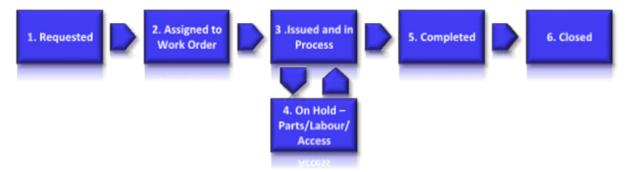
(Note: Selecting Cancel will not save any amendments, close the **Select Fields** pop up screen and return you to the Building Operations Console screen). The following tables provide a recommended Building Operations Console screen layout:

<ul> <li>Helpdesk Operators</li> <li>Building Name</li> <li>Work Request Code</li> <li>Problem Type</li> <li>Work Description</li> <li>Priority</li> <li>Due Date</li> <li>Action buttons 1 – 5</li> <li>Work Team Code</li> </ul>	Supervisor Building Name Work Request Code Problem Type Requested By Work Description Assigned To Due Date Action buttons 1 – 5	Customer Building Name Work Request Code Problem Type Floor Work Team Code Assigned To Date Work Requested Due Date
Alternative fields	<ul> <li>Escalated for Completion</li> </ul>	<ul> <li>Action buttons 1 – 5</li> <li>Escalated for Completion</li> </ul>
<ul> <li>Location</li> <li>Supervisor</li> <li>Status</li> <li>Requested By</li> <li>Work Request</li> <li>PM Procedure</li> <li>PM Schedule Code</li> <li>Division</li> <li>Department</li> <li>Site</li> <li>Building</li> <li>Floor</li> <li>Room</li> <li>Equipment</li> <li>Work Type</li> <li>Assigned To</li> <li>Date Work Requested</li> <li>Date To Perform</li> <li>Date Work Completed</li> <li>Service Request Code</li> <li>Work Team Code</li> </ul>	<ul> <li>Location</li> <li>Supervisor</li> <li>Status</li> <li>Work Request</li> <li>PM Procedure</li> <li>PM Schedule Code</li> <li>Division</li> <li>Department</li> <li>Site</li> <li>Building</li> <li>Floor</li> <li>Room</li> <li>Equipment</li> <li>Work Type</li> <li>Date Work Requested</li> <li>Date Work Completed</li> <li>Service Request Code</li> <li>Work Team Code</li> </ul>	<ul> <li>Location</li> <li>Work Description</li> <li>Supervisor</li> <li>Status</li> <li>Requested By</li> <li>Work Request</li> <li>PM Procedure</li> <li>PM Schedule Code</li> <li>Division</li> <li>Department</li> <li>Site</li> <li>Building</li> <li>Equipment</li> <li>Work Type</li> <li>Date To Perform</li> <li>Date Work Completed</li> <li>Service Request Code</li> </ul>

## 2.2. Work Request Life Cycle

As your work request progresses through different stages, the status will be updated accordingly.

There are 5 key statuses, with an additional optional status



**1. Requested:** The Work Request has been raised by the customer and assigned to the Helpdesk to assess prior to issuing to a work team.

**2. Assigned to Work Order:** The Work Request has now being assigned to the correct Work Team awaiting scheduling to a craftsperson, until this has been done, work cannot begin on the request.

Note: a work team may reassign to another work team while at this status

**Issued and in Process:** The Work Request is now with a Craftsperson and ready to work.

**On Hold – Parts/Labour/Access (Optional):** A Work Request can be put on hold for one of the noted circumstances.

**Completed:** The work pertaining to the Work Request has been completed. At this stage, the Customer Survey will become available for completion.

**Closed:** When you close out work requests, the work is no longer included the Open Work Requests reports as these have been Archived to history tables. This will happen automatically after a minimum period of two weeks.

### 2.2.1. Valid Moves & Reasons to Charge Work Request Status

#### Valid Changes

Issued — Assigned. If issued in error

Assigned — Requested. If priority/location/problem type needs amended

Do not return to requested if has been issued in error

### 2.2.3 Processing Batched Work Requests

The system also allows the mangment of work requests to be carried out in batches or groups of work requests.

From the Building Operations Console screen, select the **(A) Tick Boxes** next to the work requests that you wish to action.

Show 200 Newest	Requests - Building	B	Room	Proble	em Type	N	Nore Cle
2 selected	Estimate Schedule Issue a	incel					
T Work Reque	st codeProblem type	<ul> <li>Location</li> </ul>	<ul> <li>Work Description</li> </ul>				
Assigned to	Work Order (5)						
A Assigned to	Work Order (5) CLEANING BLOC	1	Test Work Request Primary Trade	Estimate	Schedule	Issue	Cancel
		1 1-02-2.243B	Test Work Request Primary Trade	Estimate	Schedule	Issue Issue	Cancel
A 🖾 3864150					A CONTRACTOR OF A CONTRACT	and the second second	
A 3864150 3864149	CLEANINGIBLOOD JOINERYJFIXTUR & FITTUGS	1-02-2.243B	Coming away from the wall	Estimate	Schedule 🥥	Issue	Cancel

The **(B)** Action Buttons will be replicated at the top of the screen, that will allow you to process the selected group of work requests for the required action.

**(NOTE**: depending on how the information is displayed on the screen, you may need to scroll up to be able to view the new options that appear at the top of the screen)

Once the grouped action has been completed, you can de-selected the ticked work requests by removing the tick, or selecting and de-selecting the **(C) Group Tick Box**.

# 2.2.4 Printing Work Requests If Mobile App Is Out Of Operation

Should the mobile application be unavailable, the ATL can print Work Requests from the Building Operations Console. To do this, first select the work requests you want to print by selecting **(A) tick boxes** next to the Work request number.

ARCHIBUS											ATL01 V Find a for	m or repor.	1
Building Operations Management	Building Operation	- Concela								_	_	<b>B</b>	),
On Demand Work	Building Operation	s console											
Supervisor										-	Export to XL	ort Problem 🛃 🔹 🕸	× *
Building Operations Console	Show 200 Newest Requ	iests 🗸 Buildin	g Floor	Room	Problem Type		More Clear Filter	Recent •	Group By Sta	itur i	Export to DC	x	
		FFULA								C	DOCK Select	ed Work Request Details	1
Estimate and Schedule Work Requests	Work Request Co	de Order	Problem Type	Building Name	Assigned To	Work Description					_	ed Work Requests with Floor	1
Planning Board Reserve New Part Inventory	Assigned to We	ork Order	(2)							_		d Work Request Details	Į.
Approve Work Requests	3864262	3864246	HEATING ENGINEER/WATER	SMALL ANIMAL AND RIDDELL SWANN	ATT02	R2 scenario 1g		Estimate	Schedule	Issue	PDF Selected	d Work Requests with Floor F	FIL
	3864165	3864248	ELECTRICAL/EMERGENCY LIGHTING	OLD COLLEGE		To fix details		Estimate	Schedule	Issue	Cancel	19/09/2016	
Assign Work Requests to Work Order Manage Work Order/Requests	▼ Issued and In P	rocess 🗆	(6)										
ssue Work Orders	☑ 3864260	3864241	ELECTRICALI POWER	INFIRMARY ST,09-11	ATT01	test raise wr on n	obile	Hold	Stop	Update	Complete	29/09/2016	
Update Work Orders and Work	3864254	3864229	PROJECT/PROJECT REQUEST <e50k< td=""><td>INFIRMARY ST,09-11</td><td></td><td>CP CP CP2</td><td></td><td>Hold</td><td>Stop</td><td>Update</td><td>Complete</td><td>13/01/2017 ATL01</td><td></td></e50k<>	INFIRMARY ST,09-11		CP CP CP2		Hold	Stop	Update	Complete	13/01/2017 ATL01	
Requests	☑ 3864234	3864217	BLINDS/CURTAINS/REPAIR	ROBSON BUILDING	MAUREEN MASSON	R2 scenario 6b		Hold	Stop	Update	Complete	09/01/2017	
Work Team Performance Report	5864252	3864215	DECORATIONIDAMAGED AREA/WALL	ORROK LANE 1, FLAT 5	MAUREEN MASSON	beside the windo	N	Hold	Stop	Update	Complete	09/01/2017	
	3864218	3864250	LIFTSIREPORT MINOR FAULT	CHRYSTAL MACMILLAN BUILDING		blah blah EM		Hold	Stop	Update	Complete	29/09/2016	
	3864198	3864172	ELECTRICALILIGHTING	INFIRMARY ST.09-11	ATT02	please replace bl	own lights within conference r	Hold	Stop	Update	Complete	22/09/2016	

Then select the **(B) arrow icon**, and select ether **(C) DOCX Select Work Request Details** (Word) or **(D) PDF Select Work Request Details**.

Once the report has completed, selected (E) the document created.

ARCHIBUS										Find a for	m or report
Building Operations Management	Building Operation	contole									DA
On Demand Work	building operation	is console								Date	ort Problem 📴 • 🔅 •
Supervisor										кер	ort Problem
	Show	Building	Floor	Room	Problem Type	More	Clear Filter F	Recent • Group 8	y .		
Estimate and Schedule Work Requests	3 selected	Hold Stop II	pdate Complet						1		
Planning Board			Paginated R	enort View				ă			
	Work Request Co	de Order		eport Progress				0			Due Date 🚽 Supervisor
	Assigned to W		) (2)	port Progress			Estimated	0			
Assign Work Requests to Work Order	3864262	3864246	HEATING ENGIN Report or	Result View or File	Perc		Time		a Issue		15/09/2016
Manage Work Order/Requests	3864165	3864248	ELECTRICALIEMI Job Name Work Request	Work-Requests-Det	alls-2016-09-12.docx	plete Time	Remaining		Issue		19/09/2016
	▼ Issued and In F	Process D				100% 00:00	0.09 00:00.00	Stop Job			
Update Work Orders and Work	✓ 3864260	3864241	ELECTRICALI PO		and a second	00%			Update		29/09/2016
	3864254	3864229	PROJECTIPROJEC						Update		13/01/2017 ATL01
	3864234	3864217	BLINDS/CURTAI						Update		09/01/2017 A1201
	3864232	3864215	DECORATIONIDA						Update		09/01/2017
	3864218	3864250	LIFTSIREPORT M						Update		29/09/2016
	3864198	3864172	ELECTRICALILIG						Update		22/09/2016
			CEEC INICALIEIGI						oposte		11/07/2010
	▼ On Hold for La										
	3864239	3864222	ELECTRICALIFIRI								20/09/2016
	▼ Completed □	(39)									
	3864295	3864279	JOINERYISHELVI								16/01/2017
	3864294	3864278	HEATING ENGIN								19/09/2016
	3864292	3864277	JOINERY FIXTUR								03/10/2016
	3864291	3864274	ELECTRICALIELE								03/10/2016
	3864283	3864273	PLUMBING TAPS		*						03/10/2016
	3864282	3864270	JOINERY DOORS					Close			03/10/2016
	3864279	3864262	JOINERYIDOORS					ctose			26/09/2016
	3864277	3864261	ELECTRICALIELECTRICAL EQUIPMEN	T JOHN BURNETT HOUSE	ATT04	R3 scenario 1a EM		Close			19/09/2016
	3864268	3864251	CALL OUT PLUMBER	APPLETON TOWER	COLIN PRITCHARD	HD KD 8 (4)		Close			08/10/2016
	3864261	3864247	PLUMBING STORAGE TANKS	ST LEONARDS LAND	ATT02	R2 scenario 1f		Close			29/09/2016

A word or PDF file will open separately with the content of the work requests, this can be printed or saved out with the system using the software package that opens.