

Building Engineer/ FAC

Philadelphia School District Training Manual



APPLIED DATA SYSTEMS

I N C O R P O R A T E D

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Applied Data Systems ("ADSI") has prepared this document to describe ARCHIBUS solutions and provide training for end users. Although the information in this document has been carefully prepared and is current to the best of ADSI's knowledge, ADSI does not accept any legal responsibility for any consequences, including direct or indirect liability, arising from its use. For example, ADSI is not responsible for errors due to inaccurate or incorrect information, errors arising out of modifications to this information, or errors arising out of incorrect use of this information. Copyright 2009 Applied Data Systems, Inc. All rights reserved.

Building Engineer/ FAC

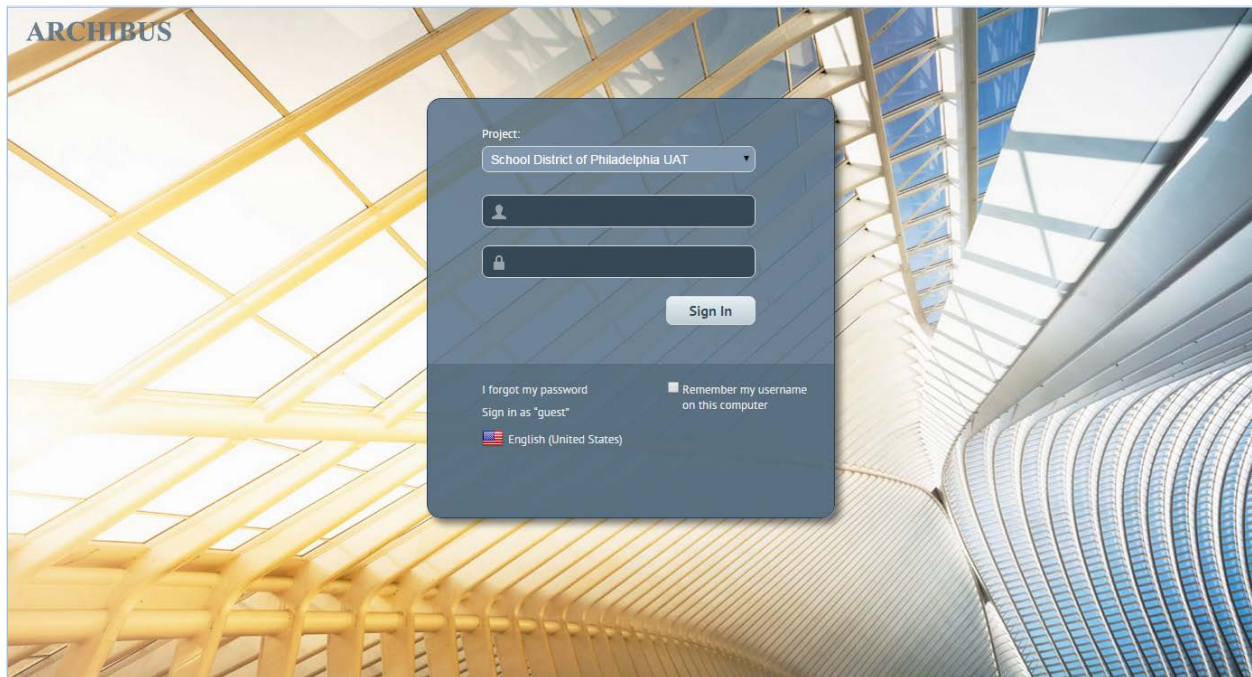
Philadelphia School District Training Manual

Introduction

This Manual introduces the user to all of the views available in the ARCHIBUS system. Actions covered in this manual include:

- ▶ Logging into the site
- ▶ Creating On Demand Work Requests
- ▶ Building Operations Console (Approve, Updating, Completing, Verify, Closing)
- ▶ Create Maintenance Requests
- ▶ Mobile Maintenance
 - ▶ Sync Device
 - ▶ Document Image
 - ▶ Update/Complete Request
 - ▶ Create Request

Logging into the site



To log in to the system you will need two pieces of data:

- ▶ User Name (*Your District given user name*)
- ▶ Password (*Your District created password*)

If you are unsure of any of this information, contact the School District IT department.

Enter your user name and password. The password is case sensitive. Click on the Login button.

If you have forgotten your password you will need to contact the School District IT department to have it reset.

Page Navigation

Navigation

The ARCHIBUS system is set up using Page Navigation. Single-clicking on an item in the Page Navigation bucket opens that item.

The screenshot displays the ARCHIBUS interface. At the top left, the ARCHIBUS logo is visible. A navigation menu on the left includes 'Building Engineer/FAC' and 'Building Operations'. The 'Building Operations' menu is expanded, showing options: 'Building Operations Console', 'Report Problem', 'Planning Board', and 'Cost Analysis'. A green arrow points from the 'Report Problem' option in the menu to the 'Report Problem' form below. The form is titled 'Report Problem' and includes the following sections:

- Requestor**: Requested By (AFM-BE), Requestor Phone, Requestor Email (afm-be@philasd.org).
- Location**: Use your assigned workspace location. Location* (S503001, B503001, FLOOR, ROOM). Describe the Location (text area).
- Equipment**: Equipment Code (text area). Buttons: Review Warranty Details, List Request for Equipment.
- Problem**: Type of Problem (OPERATIONS), Type of Problem Task (dropdown).
- Description**: Description* (text area). Workflow: No Steps Required, Request will be dispatched to GENERAL. Buttons: Submit, Cancel.

Building Operations

- Building Operations Console
- Report Problem
- Planning Board
- Cost Analysis

ARCHIBUS Building Engineer/FAC

Tasks +

Building Operations Console

Show 100 Newest Requests | Building | Program ID | Location Group ID | Work Team | More | Clear | Filter | Recent | Group By Status

0 selected

Work Request Code = Building Name = Priority = Work Description = Problem Type = Problem Task = Date Requested

▶ Requested (39)

▼ Assigned to Work Order (2)

184149	Juniata Academy	2	screen cut was damaged but found brick crumblin...	MAINTENANCE/MASONRY	WALLS (EXTERIOR)-BRICK/REPAIR DAMAGED BRICK	9/16/
184129	Juniata Academy	3	tile is broken and falling	MAINTENANCE/ROOFER	ROOF SURFACE-MASONRY-PLAYDECK/REPAIR LEAK AT DRAIN	8/27/

▶ Issued and In Process (41)

▼ Completed (18)

184148	Juniata Academy	3	screen cut WR was passed along to Maintenance D...	OPERATIONS/BLDG ENGINEER	EXTERIOR/WINDOW SCREEN MISSING OR DAMAGED	Close	9/16/
184146	Cayuga	2	one light out in stairway WR was passed along L...	OPERATIONS/BLDG ENGINEER	OPS BLANKET WO/REPLACE LIGHTS	Close	9/9/2
184143	Cayuga	1	water on the floor do to floor air conditioner.	OPERATIONS/BLDG ENGINEER	OPS BLANKET WO/CLEANING - BUILDING	Close	9/9/2
184128	Juniata Academy	2	tile is broken and falling	OPERATIONS/BLDG ENGINEER	SPACE/CEILING TILE	Close	8/27/
184127	Juniata Academy	3	Broken ceiling tile falling into space	OPERATIONS/BLDG ENGINEER	SPACE/CEILING TILE	Close	8/27/
184126	Juniata Academy	2	Flooring tile cracked and causing tripping hazard	OPERATIONS/BLDG ENGINEER	SPACE/FLOORING	Close	8/27/

Building Operations Console

Review a Request

Use the Building Operations Console to access and check on the status of your requests. To review a request just click on the Work Request Code itself.

The screenshot shows the ARCHIBUS Building Operations Console interface. At the top, there is a navigation bar with the ARCHIBUS logo, user role 'Building Engineer/FAC', and a search bar. Below the navigation bar, there are filters for 'Show' (100 Newest Requests), 'Building', 'Program ID', 'Location Group ID', and 'Work Team'. A 'Report Problem' button is visible on the right. The main content area displays a table of requests, grouped into four categories: Requested (8), Assigned to Work Order (4), Issued and In Process (5), and Completed (6). Callouts 1, 2, 3, and 4 are placed on the left side of the interface, pointing to the 'Requested', 'Assigned to Work Order', 'Issued and In Process', and 'Completed' sections respectively. Callouts 1a and 1b are placed on the right side, pointing to the 'Approve' buttons for specific requests in the 'Requested' category.

Work Request Code	Building Name	Priority	Work Description	Problem Type	Problem Task	Action
1 Requested (8)						
182268	Bartram	1	test pic	MAINTENANCE CARPENTER	BOARDS-CHALK	Update
182267	Bartram	1	test iPad	MAINTENANCE CARPENTER	BOARDS-CHALK REPAIR	Update
182213	Alt Ed Center	3	test	OPERATIONS BLDG ENGINEER	AUDITORIUM AUDITORIUM LIGHTING	Approve*
182209	Alt Ed Center	3	test	OPERATIONS BLDG ENGINEER		Approve*
182205	Alt Ed Center	3	Cant find my key	MAINTENANCE LOCKSMITH	GENERAL LS SEE DESCRIPTION FOR DETAILS	Update
182197	Alt Ed Center	3	test 1 maintenance	MAINTENANCE GLAZIER	DISPLAY CASE REPLACE BROKEN GLASS	Update
182191	Alt Ed Center	1	test	MAINTENANCE CARPENTER	AUTORIUM-CURTAINS REPAIR	Update
182182	Alt Ed Center	3	There appears to be no power to the light in th...	MAINTENANCE ELECTRICIAN	EXIT LIGHT NO POWER	Update
2 Assigned to Work Order (4)						
182221	Alt Ed Center	3	gtests	MAINTENANCE ELECTRICIAN	EMERGENCY LIGHTS HIGH HAT LIGHT FIXTURES	
182220	Alt Ed Center	3	test	MAINTENANCE AC REFRIGERATION	SPLIT SYSTEMS CHECK CONTROLS (NOT STARTING)	
182219	Alt Ed Center	3	test	MAINTENANCE AC REFRIGERATION	GENERAL AC SEE DESCRIPTION FOR DETAILS	
182218	Alt Ed Center	3	test	MAINTENANCE AUTO PLANT	BURNERS REPAIR INTAKE AIR LOUVERS	
3 Issued and In Process (5)						
4 Completed (6)						
182254	Bartram	4		OPERATIONS BLDG ENGINEER	BLANKET WO TRASH	Close
182217	Alt Ed Center	3	gtests WR was passed along to Maintenance Depart...	OPERATIONS BLDG ENGINEER	EXTERIOR EXTERIOR DOOR NOT WORKING-LOCKING	Close
182216	Alt Ed Center	3	test WR was passed along to Maintenance Department	OPERATIONS BLDG ENGINEER	ELEVATOR DOORS NOT CLOSE	Close
182215	Alt Ed Center	3	test/nWR was passed along to Maintenance Depart...	OPERATIONS BLDG ENGINEER	CAFETERIA GREASE TRAP	Close

Review a Request (con't)

1. "Requested":
 - a. with **Approve*** button – These are work requests submitted by end users waiting to be approved by Principal and/or Building Engineer.
 - b. with **Update** button – These are work requests for Maintenance awaiting Approval by the Maintenance Coordinator. Note: While the requests are still in this status the Building Engineer may edit the details of the request by selecting the Update button.
2. "Assigned to Work Order" – Items in this status are:
 - a. with No button - On the Building Engineers Console are requests for Maintenance awaiting Confirmation, Scheduling and Issuing
3. "Issued and Process":
 - a. With **Hold** **Stop** **Update** **Complete** button – On any roles console are requests that have been approved, scheduled, and issued and are being worked on.
4. "Completed":
 - a. with **Close** button – on Operations or Maintenances consoles are requests that have been completed and are ready for Closeout.
 - b. with VERIFY button – On Building Engineers console are requests that have been completed by maintenance and are awaiting verification that the work has been completed to the satisfaction of the customer.
 - c. with **Survey*** button – On Teachers Console are operations requests that are awaiting the Teachers entry of a Satisfaction Survey
 - d. Note: Manual closeout is not necessary or recommended as there is an automated routine to close requests after a certain time period allowing Operations or Maintenance staff ample time to add notes, labor hours and material costs to the request

Building Operations Console Filter

The screenshot shows the ARCHIBUS Building Operations Console interface. At the top, there are navigation elements including the ARCHIBUS logo, user name 'Building Engineer/FAC', and a search bar. Below this is a filter bar with fields for 'Building', 'Program ID', 'Location Group ID', and 'Work Team'. A 'Filter' button is highlighted with a green box labeled '1'. To the right of the filter bar are buttons for 'More', 'Clear', 'Filter', 'Recent', and a 'Group By' dropdown menu set to 'Status', with a green box labeled '2a' pointing to the 'Filter' button and '2b' pointing to the 'Status' dropdown. Below the filter bar is a table of requests, categorized into 'Requested', 'Assigned to Work Order', 'Issued and In Process', and 'Completed'. The table columns include 'Work Request Code', 'Building Name', 'Priority', 'Work Description', 'Problem Type', 'Problem Task', 'Date Requested', and 'Status'. Annotations include green boxes labeled '2c' and '2d' pointing to the 'Problem Type' and 'Problem Task' columns respectively. A set of five green arrows labeled '7', '4', '3', '5', and '6' points to the 'Problem Type', 'Problem Task', 'Problem Task', 'Problem Task', and 'Status' columns respectively.

The screenshot shows the ARCHIBUS Building Operations Console interface with a detailed filter configuration panel. The panel includes various filter options such as 'Problem Type', 'Problem Task', 'Floor', 'Room', 'Trade', 'Craftsperson', 'Equipment', 'Requestor', 'Description', 'Work Request Code', 'Work Order Code', 'Work Type', 'Date Requested From', 'Date Requested To', 'Date to Perform From', 'Date to Perform To', 'Store Room', 'Part', 'Part Estimation Status', 'In Stock Not Reserved', 'Not in Stock', 'Reserved', 'Estimated Cost', 'Has Documents', 'Has Craftsperson Notes', 'Priority Determination', 'Work Request Status' (with options like Approved, Assigned, Issued, Stopped, On Hold, Completed), 'Priority' (with options 1-5), and 'Escalated?'. A green box labeled '8' highlights the 'Work Request Status' section.

The screenshot shows the ARCHIBUS Building Operations Console interface with a 'Select Value - Building Code' dialog box open. The dialog box displays a list of buildings with columns for 'Site Code', 'Building Code', and 'Building Name'. A green box labeled '9' highlights the 'Building Code' column. A green box labeled '10' highlights the first row of the list, which is 'S001101' for 'A Step Ahead'.

Site Code	Building Code	Building Name
S001101	B001101	A Step Ahead
S001201	B001201	APM - Luzerne
S001301	B001301	Bambi Day Care
S001401	B001401	Community Concern
S001501	B001501	Creative Children's Academy
S001701	B001701	YEP / Discovery Place
S002001	B002001	Grace Trinity
S002101	B002101	Green Byrne
S002301	B002301	Ken-Crest - Northeast
S002601	B002601	Kinder Academy - Parkwood
S002801	B002801	Korean Community - Rising Sun

1. "Show": This drop down list has multiple choices for displaying the data. The default choice is "Show Newest 100". Other options that apply are: All, My Requests, Requests Requiring My Approval, Unassigned (No BE or mechanic assigned), 10 Newest, 10 Oldest, 250 Newest.
2. Primary Filter options (see the description of the selection lists items 8 thru 12 below):
 - a. Building: Hover over the field to show and select the "... " button.
 - This will restrict the data to only show the selected building(s)
 - b. Program ID: Hover over the field to show and select the "... " button.
 - This will restrict the data to only show the buildings for the selected program(s)
 - c. Location Group ID: Hover over the field to show and select the "... " button.
 - This will restrict the data to only show the buildings for the selected Location Group(s)
 - d. Work Team: Hover over the field to show and select the "... " button.
 - This will restrict the data to only show the selected Work Team(s) [trade]
3. Select Filter button to apply the restriction to the list
4. Select the Clear button to return to the original restriction when the console was opened
5. Select the Recent button to show the last 8 filters that have been submitted. By selecting the item it will immediately apply the filter
6. Group By is a list of items that change the sort order of the data. The options are: Status (default), Site, Building, Problem Type, Craftsperson (mechanic or BE), Trade, Work Order, or None
7. The More button opens additional fields and options that can be applied to the filter
8. Some of the more common fields in the additional fields are: Craftsperson (mechanic or BE), Date Requested (From and To), Date to Perform (From and To), Has Documents (If images have been added), Has CF Notes (If mechanic or BE has added notes), Priority Determination (has any of the determination fields entered), Work Type (Both, On Demand, PM), and Priority 1 to 5
9. To filter the selection lists you can type the name or code of the value you are searching for and select the Enter key of the keybd. The "X" in the black circle to the right of selection boxes will clear the filter on the list
10. By using the check boxes you can select multiple items and then the Save Selected button at the bottom right of the form to submit the items.

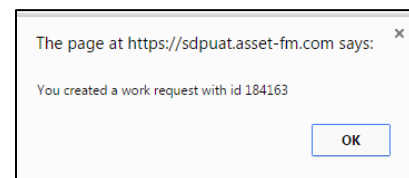
Report a Problem - Operations

Submit a Request

To submit a request select “Report a Problem” from either the Navigation page or the Building Operations Console

The screenshot shows the ARCHIBUS 'Report Problem' form. It includes fields for Requestor information (Requested By, Requestor Phone, Requestor Email), Location (Floor, Room, Describe the location), Equipment (Equipment Code), Problem (Type of Problem, Type of Problem Task), and Description. A 'Submit' button is at the bottom, and a 'Sign Out' button is in the top right corner. Numbered callouts 1 through 6 highlight these specific areas.

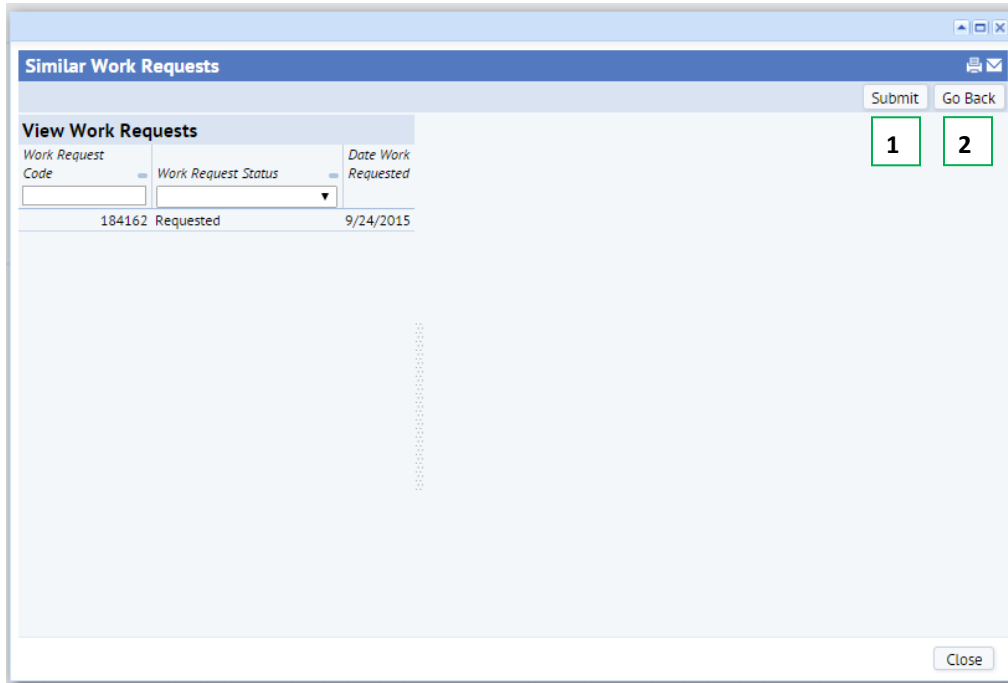
1. Logged in user information will fill in the “Requestor” information
2. “Location” information must be filled in. You MUST enter both “Floor” and “Room” or “Describe the location” fields.
3. “Problem” – select the problem type from the drop down menus provided that best describes your situation.
4. “Description” – give more details about the problem.
5. “Submit”
6. “Sign Out”
7. After the problem is submitted you will receive this message with the “Work Request #”.



7

Duplicate Request

If another request has been submitted with the same information you will receive this message.



1. If you want to submit your request select “Submit”.
2. If you want to cancel select “Go Back” and select “Cancel” at bottom of screen.

Approve

Principal/Building Engineer Approve

Approve Work Request 184175

Comments

3

1 2

Approve Reject

Building Engineer Edit and Approve

Approve Work Request 184204

Requested by AFM-BE

Requestor Email-Phone afm-be@philasd.org-

Equipment Code

Account Code

Avantis ID

Problem Type* OPERATIONS|BLDG ENGINEER

Document 1

Document 3

Description* 92415-1

3 Comments*

Determination Life Safety
 Student Occupied Area
 Disrupts Education Process
 Collateral Damage if Not Addressed
 Vandalism

Justification Comment

Priority* 1-Emergency
 2-Important
 3-Standard
 4-Blanket Work
 5-Preventive Maintenance

Site Name* Alt Ed Center

Building Name* Alt Ed Center

Floor Code

Room Code

Problem Location 92415-1

Problem Task* CAFETERIA|GREASE TRAP

Document 2

Document 4

Incident Number

1 2

Approve Reject

Principal/Building Engineer Approve

1. If the request is applicable the Principal and/or Building Engineer can select the Approve button. Note that the Comments on approval are not necessary but can be entered.
2. If for some reason the Principal and/or Building Engineer need to reject the request select the Reject button.
3. If Reject is to be selected a Comment MUST be entered.

Building Engineer Edit and Approve

After the Principal approves the Teachers request the Building Engineer needs to Edit and Approve the request. The Building Engineer will verify the information entered by the teacher or principal and can add to it by adding additional information not entered by the previous roles.

1. Once done select the Approve button to proceed.
2. If the work is not something that the Building Engineers are responsible for the Reject button should be selected
3. If Reject is selected a Comment MUST be entered.

Report a Problem - Maintenance

Create Maintenance Request

Update Work Request 184202 ⌵ ⌵ ⌵

Problem

Work Request Code: 184202	Work Order: 2080
Problem Type: OPERATIONS BLDG ENGINEER	Problem Task: AUDITORIUM AUDITORIUM LIGHTING
Requested by: AFM-BE	Date Requested: 9/25/2015
Requestor Email-Phone: afm-be@philasd.org	Time Requested: 7:07 AM
Priority: Standard	Avantis ID:
Description: test cme 9 25 2015	

▼ **More Information**

Site Code - Name: S549001 -Cayuga	Document 1: <input type="text" value="Upload a document"/> ⬆
Building Code - Name: B549001 -Cayuga	Document 2: <input type="text" value="Upload a document"/> ⬆
Floor Code: <input type="text" value="4"/>	Document 3: <input type="text" value="Upload a document"/> ⬆
Room Code: <input type="text" value="544"/>	Document 4: <input type="text" value="Upload a document"/> ⬆
Problem Location: <input type="text"/>	
Determination: <input type="checkbox"/> Life Safety	
<input checked="" type="checkbox"/> Student Occupied Area	
<input type="checkbox"/> Disrupts Education Process	
<input type="checkbox"/> Collateral Damage if Not Addressed	
<input type="checkbox"/> Vandalism	
Incident Number: <input type="text"/>	
Justification Comment: <input type="text" value="TEST CME 9/25/2015"/>	
Date to Perform: <input type="text" value="9/28/2015"/>	Equipment Code: <input type="text"/>
<input type="button" value="List Request for Equipment"/>	
Related Work Request Code:	Account Code: <input type="text"/>
Status: <input type="text" value="Issued and In Process"/>	<input type="button" value="Indicate on Drawing"/>

► **History**

► **Trades**

► **Parts**

► **Craftspersons**

► **Tool Types**

► **Tools**

► **Other Costs**

Estimated Costs	Actual Costs
Estimated Cost of Labor: 0.00	Cost of Labor: 0.00
Estimated Cost of Parts: 0.00	Cost of Parts: 0.00
Estimated Cost of Tools: 0.00	Cost of Tools: 0.00
Estimated Other Costs: 0.00	Other Costs: 0.00
Estimated Total Cost: 0.00	Total Cost: 0.00

Update Work Request

Equipment Down (Hours): <input type="text" value="0.00"/>	Cause Code: <input type="text"/>
Current Equip. meter reading: <input type="text" value="0.00"/>	Repair Type: <input type="text"/>
Craftspersons Notes: <input type="text"/>	

1

If it is determined that the Building Engineer needs Maintenance Trades to complete the issue surrounding the original request they will need to use the Building Operations Console in the browser of MOJO.

1. On the Update form select Create Maintenance Request

Prepared by: Applied Data Systems

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9/21/2015

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User Manual Building Engineer FAC Training Manual V3.Docx

Trade Secret

Create Maintenance Request (con't)

Report Problem

1

Location* 5549001 8549001 4 544
Site and Building are required. Please also enter Floor and Room OR describe the location below.

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

Equipment

Equipment Code
You can enter the Equipment Code if you know it.

[Review Warranty Details](#) [List Request for Equipment](#)

2

Problem

Type of Problem MAINTENANCE
ELECTRICIAN
Type of Problem Task INTERIOR LIGHTS
NO POWER-SHORT

3

Description

Description* test cme 9 25 2015 LIGHTS ARE OUT IN THE AUDITORIUM

Priority*
 2-Important
 3-Standard
 4-Back Log

4

Workflow
Workflow Steps:
On status of Requested: Edit and Approve is required by an employee with Service Desk Role MAINT-CORD-APPROVERS
On status of Assigned to Work Order: Autodispatch is required by AFM
On status of Assigned to Work Order: Autoestimate is required by AFM
On status of Assigned to Work Order: Schedule Approval is required by an employee with Service Desk Role MAINT-SCHEDULERS

Request will be supervised by AFM

Determination Life Safety
 Student Occupied Area
 Disrupts Education Process
 Collateral Damage if Not Addressed
 Vandalism

Incident Number

5

Justification Comment NO LIGHTS AND THE STUDENTS ARE IN CLASS

6

[Submit](#) [Cancel](#)

Create Maintenance Request (con't)

1. Confirm Location information copied from original request is valid
2. Select Problem Type Maintenance and then Trade/Task Item and Task required
3. Confirm Description or add more to it for maintenance
4. Check Priority Determination items as appropriate (Note: If vandalism is checked enter in an incident number if known)
5. If based on the items you are selecting a priority greater than 3 please enter in a Justification Comment
6. Select Submit

Work Request Code	Building Name	Priority	Work Description	Problem Type	Problem Task	Date Work Requested	Avantis ID	Location
154209	Alt Ed Center	3	test cme 9 25 2015 NEEDS NEW HEATER FOR AREA	MAINTENANCEPLUMBING	WATER HEATER-OTHER TYPEINSTALL NEW HEATER	9/25/2015		B503001-1-
154208	Cayuga	3	test cme 9 25 2015 LIGHTS ARE OUT IN THE AUDIT...	MAINTENANCEELECTRICIAN	INTERIOR LIGHTSINO POWER-SHORT	9/25/2015		B549001-4-

7. Request will appear on the Building Ops Console as a Requested WR from the BE. Select the Original or New Request to open the Review form

Work Request

Problem

Work Request Code: 154208
 Problem Type: MAINTENANCEELECTRICIAN
 Requested by: AFM-BE
 Requestor Email-Phone: afm-be@ghilassd.org
 Priority: Standard
 Description: test.cme 9 25 2015 LIGHTS ARE

More Information

Site Code - Name: 5549001 -Cayuga
 Building Code - Name: B549001 -Cayuga
 Floor Code: 4
 Room Code: 544
 Problem Location:
 Determination: Life Safety
 Student Occupied
 Disrupts Education
 Collisional Damage
 Vandalism
 Justification Comment: NO LIGHTS AND
 Date to Perform: 9/25/2015
 Related Work Request Code: **154209**
 Status: Requested

Problem

Work Request Code: 154146
 Problem Type: OPERATIONSIBLDG ENGINEER
 Problem Task: OPS BLANKET WIREPLACE LIGHTS
 Description: one light out in stairway WR was passed along to Maintenance Department
 Problem Location: Stairway 4 between 1st fl and basetment.

More Information

Service Request Code: 2752
 Requested by: MARSH, TERRANCE_555
 Priority: Important
 Location: B549001--
 Account Code:
 Status: Completed
 Date to Perform: 9/9/2015
 Document 1:
 Document 2:
 Document 3:
 Document 4:
 Work Order: 2043
 Date Requested: 9/9/2015
 Time Requested: 11:20 AM
 Division Code:
 Department Code:
 Equipment Code:

8. The Related Work Request will now display the Work Request # of either the original or new request depending on which request you opened. You can click on the value to see basic details of this related request

Building Operations Console Filter

The screenshot shows the ARCHIBUS Building Operations Console interface. At the top, there's a navigation bar with the ARCHIBUS logo, user name 'Building Engineer/FAC', and 'Tasks-' dropdown. Below this is a search bar and a 'Report Problem' button. The main area displays a list of requests under the heading 'Show 100 Newest Requests'. The list is organized into categories: Requested (39), Assigned to Work Order (2), In Process (41), and Completed (18). Each request row includes details like Work Request Code, Building Name, Priority, Work Description, Problem Type, Problem Task, and Date Requested. Numbered callouts are placed over the interface: '1' is over the 'Show 100 Newest Requests' dropdown, '2' is over the 'Building' dropdown menu, '3' is over the 'Filter' button, and '4' is over the 'More' button.

1. “Show 100 Newest Requests Filter “– the standard view will show the 100 Newest Requests by date.
2. Filter options Building, Program ID, Location Group ID, Work Team – select appropriate field and use drop down menu to select information to filter.

This screenshot shows a 'Select Value - Building Code' dialog box. It has a search field for 'Site Code' and a list of building codes with their corresponding names. The list includes: 5001101 (A Step Ahead), 5001201 (APH - Luzerne), 5001301 (Bambi Day Care), 5001401 (Community Concern), 5001501 (Creative Children's Academy), 5001701 (YEP / Discovery Place), 5002001 (Grace Trinity), 5002101 (Green Byrne), 5002301 (Kam-Crest - Northeast), 5002601 (Kinder Academy - Parkwood), and 5002801 (Korean Community - Rising Sun).

3. Select Filter button.
4. More Button. Provides the ability to filter by additional fields available in the system.

This screenshot shows the 'More' filter dialog box. It contains several sections of filter options:

- Problem Type, Problem Task, Floor, Room
- Trade, Craftsperson, Equipment, Requestor
- Description, Work Request Code, Work Order Code, Work Type (Both)
- Date Requested From, Date Requested To, Date to Perform From, Date to Perform To
- Store Room, Part, Part Estimation Status (checkboxes for In Stock Not Reserved, Not in Stock, Reserved)
- Estimated Cost (dropdown), Has Documents (checkbox), Has Craftsperson Notes (checkbox), Priority Determination (checkbox)
- Work Request Status (checkboxes for Approved, Assigned, Issued, Stopped, On Hold, Completed)
- Priority (radio buttons for 1, 2, 3, 4, 5)
- Escalated? (checkbox)

Mobile

1 ARCHIBUS

2 Maintenance

6 Issued

7 Search Sort by:

9

Issue ID	Description	Status
184154	OPERATIONS BLDG ENGINEER 09/23/2015 Test cme 9 23 2015	Issued and In Process
184155	OPERATIONS CUSTODIAL 09/23/2015 Test cme 9 23 2015	Issued and In Process
184156	OPERATIONS BLDG ENGINEER 09/23/2015 Replace light bulbs	Issued and In Process
184205	OPERATIONS BLDG ENGINEER 09/25/2015 test	Issued and In Process Assigned To:AFM-BE
184207	OPERATIONS BLDG ENGINEER 09/25/2015	Issued and In Process

3 Web Central URL
https://sdpdev.asset-fm.com/archibus
Change Web Central Server URL

4 Registered User
AFM-BE
Change Registered User

5 Reset Background Data Sync Flag

9 Update
Hold for Parts
Hold for Labor
Hold for Access
Stop
Complete

8 Cancel Done

Status
Escalation
Location
Problem Type

Main form

1. The gear icon opens the settings form where you can change base items
2. The Maintenance App opens the main form list displaying requests that the register BE or mechanic is assigned to work on including Blanket Work Orders for BE's

Settings

3. Selecting the "Change Web Central Server URL" provides the user with instructions on how to point to a different Application server.
 - a. URL for Training: <https://sdpuat.asset-fm.com/archibus>
 - b. URL for Production: <https://sdp.asset-fm.com/archibus>
4. To change the registered user select button and enter in your district user name and password
5. Select the Reset Background Data Flag button to force the download of updated background data.
Note: Background data is lists of Building, Floor, Room, Equipment, Repair Type, Cause Codes, etc. It is only necessary to do this if these data lists have changed and will take a while to update.

Issued Request List

6. Selecting the "<Apps" button will take you back to the Main form. Selecting the looping arrows button will synchronize the Work Request data from the database to the mobile device and the data from the mobile device to the database.
7. By typing in various data such as the Work Request number, Building Code, Equipment Code will start the filtering of the data list matching the data entered. To clear the filter just clear the field.
8. The Sort list will allow the user to change the sort order from its default of status to either Location or Problem Type
9. The request list displays basic information about the request. The check marks when selected allow the user to select multiple requests and then do some basic bulk commands such as Update or changing the status of all selected.

Update and Craftsperson Form

1 < Back 2 3 4 5

Update

182207 08/10/2015

Requestor	AFM-TEACHER
Building	B503001 Alt Ed Center
6 Floor	
6 Room	
7 Problem Location	in my classroom # 231
Problem Type	OPERATIONS BLDG ENGINEI
Problem Task	BLANKET WO SETUP/BREAK
Status	Issued and In Process
8 Equipment Code	
Priority	3
Description	test
9 Craftsperson Notes	

Craftsp...¹ Parts Tools Costs Docurr

< Back

4 Save + Assign Craftsperson 5

6 Craftsperson Code *

7 Date Scheduled 09/28/2015

* Time Scheduled 21:49

2 Actual Hours

2 Overtime Hours

2 Doubletime Hours

Date Started

Time Started

Start

Date Finished

Time Finished

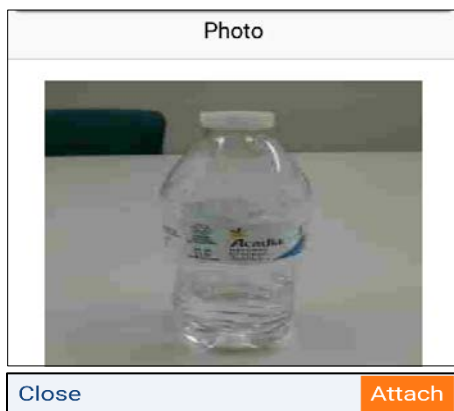
Stop

Work Type UnSpecified

3 Comments

Craftspersons

1 **AFM-BE** 0.00 Hours UnSpecified



6 Floor Done

Floor Code: 0
Building Code: B201001

Floor Code: 1
Building Code: B201001

Floor Code: 2
Building Code: B201001

Update Form

1. The Back button will take the user to the request list
2. The camera button will open the camera feature of the phone allowing the user to take a photo and attach it to the request by selecting the Attach button after the photo is taken
3. The Pin map symbol would open the floor plan of the entered Building, Floor and Room of the request (Note: This feature is not available yet)
4. The drop down arrow icon opens a list of statuses to set the request too. This is how you would set the status to complete.
5. The paper and pencil icon would open the floor plan allowing the user to mark up the floor plan with notes saving it as an attached image to the request
6. Add or change the Floor and/or Room codes by selecting the orange arrow button. Select the record to enter it to the field.
7. The Problem Location can be cleared or added to. To clear select the "X". To add click in the field and use the keybd or voice recognition option.
8. Note that when selecting equipment the list will be filtered by the Building, Floor and Room entered in the form
9. Select the Craftsperson Notes and use either the devices keybd or voice recognition options.

Craftsperson Update Form

1. To update the hours worked select the Craftsperson button at the bottom of the main Update form and then scroll to the bottom of the form and select the name.
2. Enter in the Actual Hours (straight time hours), Overtime Hours or Doubletime hours as applicable
3. Enter comments if you need to express something unique about the time entry itself
4. Once entered select the Save button to save the entry
5. If you need to enter a new entry as on a Blanket Work Order or where you have a custodial or general helper work on the request with you select the + Assign Craftsperson button
6. Initially the registered users name will enter in the Craftsperson field but this can be changed by selecting the field and selecting a new record
7. The current date will be entered into the Date Scheduled field if you are entering for a previous day select the field to change the date.
8. Finally fill in all the other fields as previously mentioned and select Save.

Mobile – Create Request

1 < Back [Camera] [Location] [Edit] [Menu] 2 3 4 5

Create Work Request

Requested By AFM-BE

6 Building Name B503001 Alt Ed Center [X] >

Floor Code >

7 Room Code >

8 Problem Location

9 Problem Type [X] >

10 Problem Task >

11 Equipment Code >

12 Description

- Problem Type Cancel
- AIR QUALITY
 - ASBESTOS
 - CB >
 - FOOD SERVICE
 - INSPECTION
 - INSPECTION FAILURE
 - LEAD-BASED PAINT
 - 8 MAINTENANCE >
 - MOLD
 - OPERATIONS
 - PREVENTIVE
 - RA

- Problem Task Cancel
- 9 BACKFLOW PREVENTER- >
 - CONSTANT PRESSURE PUMP >
 - DRAIN-FLOOR >
 - DRAIN-MAIN >
 - DRAIN-PARKWAY >
 - DRAIN-ROOF >
 - DRINK FOUNTAIN-WATER COOLER >
 - GENERAL PB >
 - 9 INSTALL NEW >
 - LIGHT WELL >
 - SERVICE SINK >
 - SHOWER >

- < Problem Type MAINTENANCE Cancel
- MAINTENANCE|IRONWORK
 - MAINTENANCE|LOCKSMITH
 - MAINTENANCE|MACHINIST

- < Problem Task INSTALL NEW Cancel
- INSTALL NEW|INSTALL NEW DRAIN LINE
 - INSTALL NEW|INSTALL NEW GAS LINE
 - INSTALL NEW|INSTALL NEW GAUGES
 - INSTALL NEW|INSTALL NEW HOSE BIB
 - INSTALL NEW|INSTALL NEW WATER LINE

Mobile – Create Request

1. The Back button will take the user to the request list
2. The camera button will open the camera feature of the phone allowing the user to take a photo and attach it to the request by selecting the Attach button after the photo is taken
3. The Pin map symbol would open the floor plan of the entered Building, Floor and Room of the request (Note: This feature is not available yet)
4. The paper and pencil icon would open the floor plan allowing the user to mark up the floor plan with notes saving it as an attached image to the request
5. Once all the data is entered in the form select the Disc icon to save the record. Note: Once saved to the mobile device back will need to be selected and the Synch button selected to send the request back to the main database for the proper workflow approvals, scheduling and issuing.
6. If a BE creates the request their primary building is entered initially into the form however this can be changed by selecting the orange arrow button
7. Select the Floor and/or Room codes by selecting the orange arrow button. Select the record to enter it to the field.
8. The Problem Location is entered by clicking in the field and using the keybd or voice recognition option.
9. To select the 2 level problem type select the arrow at the right of the field then after finding the correct level 1 value select the arrow button to the right of Operations or Maintenance depending on what is being entered
10. To select the 2 level problem task select the arrow at the right of the field then after finding the correct level 3 value select the arrow button to the right of task item, then selecting the task itself
11. Note that when selecting equipment the list will be filtered by the Building, Floor and Room entered in the form
12. Select the Description and use either the devices keybd or voice recognition options.

Work Flow

SDP High Level Facilities Process Flow

