

# Maintenance Coordinator/ Scheduler/ Supervisor

Philadelphia School District Training Manual - Version 1.0



**APPLIED DATA SYSTEMS**

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



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# Maintenance Coordinator/ Scheduler/ Supervisor

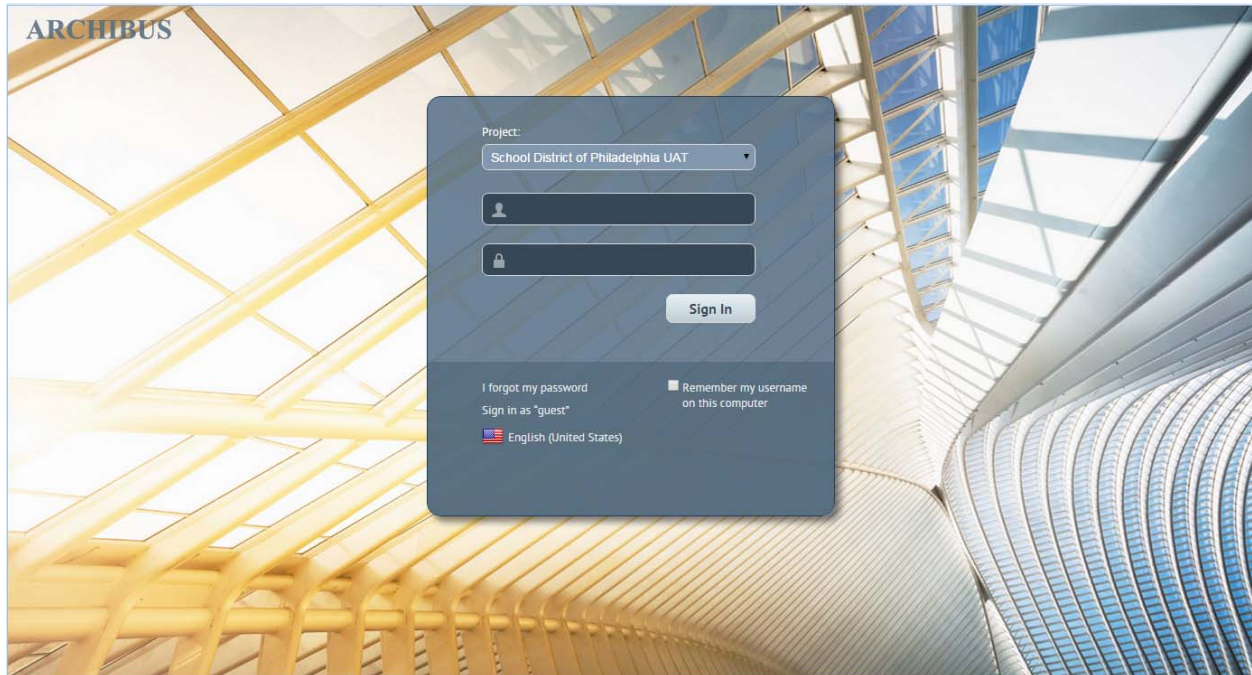
Philadelphia School District Training Manual - Version 1.0

## 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 three pieces of data:

- URL
  - For Training: <https://sdpuat.asset-fm.com/archibus>
  - For Production: <https://sdp.asset-fm.com/archibus>
- 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 shows the ARCHIBUS interface. At the top left is the ARCHIBUS logo and the user role 'Building Engineer/FAC'. A navigation menu is open, showing options: 'Building Operations Console', 'Report Problem', 'Planning Board', and 'Cost Analysis'. A green arrow points from the 'Report Problem' menu item to the corresponding form section. The form is titled 'Report Problem' and includes sections for: 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), Equipment (Equipment Code, Review Warranty Details, List Request for Equipment), Problem (Type of Problem: OPERATIONS, Type of Problem Task), and Description (Description\*, Workflow: No Steps Required, Request will be dispatched to GENERAL). At the bottom are 'Submit' and 'Cancel' buttons.



**ARCHIBUS** Building Engineer/FAC

**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	9/16/
184146	Cayuga	2	one light out in stairway WR was passed along L...	OPERATIONS/BLDG ENGINEER	OPS BLANKET WOIREPLACE LIGHTS	9/9/2
184143	Cayuga	1	water on the floor do to floor air conditioner.	OPERATIONS/BLDG ENGINEER	OPS BLANKET WO/CLEANING - BUILDING	9/9/2
184128	Juniata Academy	2	tile is broken and falling	OPERATIONS/BLDG ENGINEER	SPACE/CEILING TILE	8/27/
184127	Juniata Academy	3	Broken ceiling tile falling into space	OPERATIONS/BLDG ENGINEER	SPACE/CEILING TILE	8/27/
184126	Juniata Academy	2	Flooring tile cracked and causing tripping hazard	OPERATIONS/BLDG ENGINEER	SPACE/FLOORING	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's 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 work requests, grouped into four categories: Requested (8 items), Assigned to Work Order (4 items), Issued and In Process (5 items), and Completed (6 items). Each row includes a checkbox, Work Request Code, Building Name, Priority, Work Description, Problem Type, Problem Task, and an action button (Update, Approve, or Close). Numbered callouts 1-4 point to specific rows: 1 points to the first row in the 'Requested' group, 2 points to the third row in the 'Assigned to Work Order' group, 3 points to the first row in the 'Issued and In Process' group, and 4 points to the first row in the 'Completed' group.

Work Request Code	Building Name	Priority	Work Description	Problem Type	Problem Task	Action
182268	Bartram	1	test plc	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	Can't 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
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	
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  button – On the Maintenance Coordinator Console are requests submitted by Building Engineers waiting to be approved by Maintenance Coordinator
  - b. with  button – On the Maintenance Scheduler Console are requests submitted by Maintenance Mechanics waiting to be approved by Maintenance Scheduler
2. “Assigned to Work Order” – Items in this status are:
  - a. with      button – On the Maintenance Scheduler Console are requests waiting for their confirmation they have reviewed it.
  - b. with     button – On the Maintenance Scheduler Console are requests that have been reviewed and are awaiting their scheduling and issuing
  - c. with     button – On the Maintenance Scheduler Console are requests that have been scheduled and are awaiting issuing
3. “Issued and Process”:
  - a. With     button – On any roles console are requests that have been approved, scheduled, and issued and are being worked on.
4. “Completed”:
  - a. with  button – on Maintenances consoles are requests that have been completed by the mechanic and if necessary verified by the Building Engineer and are ready for archiving.
  - b. with  button – on Maintenances consoles are requests that have been completed by the mechanic requiring verification by the Building Engineer.
  - c. with  button – On Maintenance consoles are requests that have been completed by maintenance and are awaiting verification by the building engineer that the work has been completed satisfactorily
  - 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

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

1 2a 2b 2c 2d 7 4 3 5 6

Work Request Code	Building Name	Priority	Work Description	Problem Type	Problem Task	Date Requested
184149	Juniatla Academy	2	screen cut was damaged but found brick crumblin...	MAINTENANCE/MASONRY	WALLS (EXTERIOR)-BRICK/REPAIR DAMAGED BRICK	9/16/
184129	Juniatla Academy	3	tile is broken and falling	MAINTENANCE/ROOFER	ROOF SURFACE-MASONRY-PLAYDECK/REPAIR LEAK AT DRAIN	8/27/

ARCHIBUS Building Engineer/FAC Tasks-

Building Operations Console

Show 100 Newest Request Building Program ID Location Group ID Work Team Less C

8

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 In Stock Not Reserved Not in Stock Reserved

Estimated Cost Has Documents Has Craftsperson Notes Priority Determination

Work Request Status Approved Assigned Issued Escalated? Priority 1 2 3 4 5 Stopped On Hold Completed

ARCHIBUS Building Engineer/FAC Tasks-

Building Operations Console

Show 100 Newest Request Building Program ID Location Group ID Work Team

Select Value - Building Code 9

Site Code: S[541] All[541]

Site Code	Building Code	Building Name
S001101	8001101	A Step Ahead
S001201	8001201	APM - Luzerne
S001301	8001301	Bambi Day Care
S001401	8001401	Community Concern
S001501	8001501	Creative Children's Academy
S001701	8001701	YEP / Discovery Place
S002001	8002001	Grace Trinity
S002101	8002101	Green Byrne
S002301	8002301	Ken-Crest - Northeast
S002601	8002601	Kinder Academy - Parkwood
S002801	8002801	Korean Community - Rising Sun

10

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 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), 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 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

## Submit a Request

**1** Requestor

Requested By AFM-COORD  
Requestor Phone  
Requestor Email afm-coord@philasd.org

**2** Location

Use your assigned workspace location

Location\* S101001 B101001 FLOOR ROOM  
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](#)

**3** Problem

Type of Problem MAINTENANCE  
PLUMBING  
Type of Problem Task SHOWER  
INSTALL NEW VALVE CONTROLLER

**4** Description

Description\*

**5** Priority\*

- 1-Emergency
- 2-Important
- 3-Standard
- 4-Back Log
- 5-Preventive Maintenance

**6** Workflow

**7** Determination

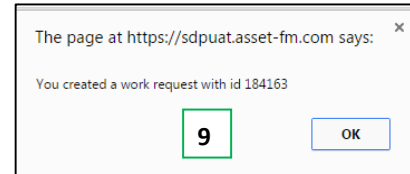
- Life Safety
- Student Occupied Area
- Disrupts Education Process
- Collateral Damage if Not Addressed
- Vandalism

Incident Number

Justification Comment

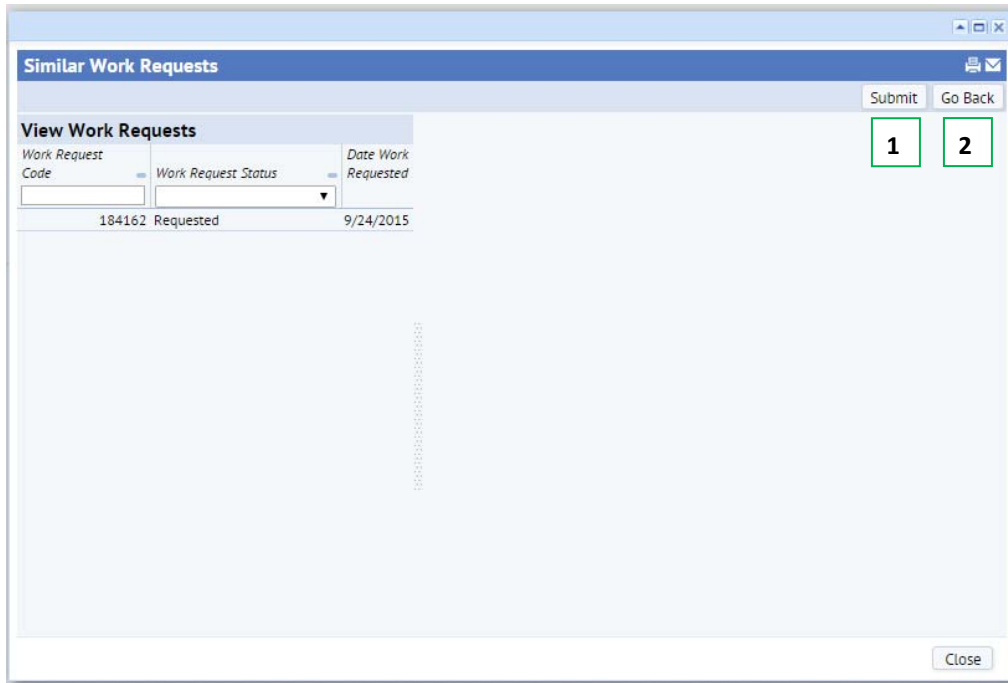
**8** [Submit](#) [Cancel](#)

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 4 levels of the Problem from the drop down menus provided that best describes your situation
  - Type of Problem 1 – Maintenance
  - Type of Problem 2 – Trade
  - Type of Problem Task 1 – Task Item
  - Type of Problem Task 2 – Task to perform
4. Description – give more details about the problem.
5. Priority
6. Workflow explains the process the request will take based on the data as entered in the form
7. Determination section allows the user to enter in reasons why a higher priority level is warranted
8. Submit
9. After the problem is submitted you will receive this message with the Work Request #.



## 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

## Maintenance Coordinator Edit and Approve

**Approve Work Request 184285**

Requested by	AFM-BE	Site Name*	Alt Ed Center
Requestor Email-Phone	afm-be@philasd.org-	Building Name*	Alt Ed Center
Equipment Code	<input type="text"/>	Floor Code	1
	<input type="button" value="List Request for Equipment"/>		
Account Code	<input type="text"/>	Room Code	A2
Avantis ID		Problem Location	<input type="text"/>
Problem Type*	MAINTENANCE ELECTRONICS	Problem Task*	DATA LINES R-R DATA JACKS
Document 1	<input type="button" value="Upload a document"/>	Document 2	<input type="button" value="Upload a document"/>
Document 3	<input type="button" value="Upload a document"/>	Document 4	<input type="button" value="Upload a document"/>
Description*	9 30 2015		
<b>3</b> Comments*	<input type="text"/>		
Determination	<input type="checkbox"/> Life Safety <input 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"/>		
Priority*	<input checked="" type="radio"/> 1-Emergency <input type="radio"/> 2-Important <input type="radio"/> 3-Standard <input type="radio"/> 4-Back Log <input type="radio"/> 5-Preventive Maintenance		
<b>Workflow</b>	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		<b>1</b>	<b>2</b>
		<input type="button" value="Approve"/>	<input type="button" value="Reject"/>

## Maintenance Scheduler Confirm

**Approve Work Request 184175**

Comments

**3**

**1** **2**



### Maintenance Coordinator Edit and Approve

After the Building Engineer submits a Maintenance request the Maintenance Coordinator needs to Edit and Approve the request. The Coordinator will verify the information entered by the Building Engineer and can add to it or alter it.

1. Once done select the Approve button to proceed through the process sending it to the Trades Scheduler. Note that the Comments on approval are not necessary but can be entered.
2. If the work is not something that Maintenance is responsible or the Building Engineer has not tried everything they should have then Reject button should be selected
3. If Reject is selected a Comment MUST be entered.

### Maintenance Scheduler Confirm

1. If a Mechanic submits a request The Scheduler can review the details of the request and select the Approve button. Note that the Comments on approval are not necessary but can be entered.
2. If for some reason the request is not acceptable or warranted select the Reject button.
3. If Reject is to be selected a Comment MUST be entered.

# Planning Board Scheduling

## Planning Board Scheduling

The Planning Board is a tool for scheduling the Mechanics to requests via a calendar based view. This form is NOT where a Scheduler can make approvals or issue work it strictly for scheduling.

Note: When first opened no requests or mechanic calendar view are displayed. You must enter in a filter to be applied to the Task Tree and select the Show button.

1. Enter in a Building Code (optional) or Work Request Code (if looking for a specific request) to assist in filtering the list to a more manageable list of requests. It is suggested at a minimum to enter in the Schedulers Work Team (trade) they are looking to schedule requests for.
2. The task list can further be filtered by a given Priority by selecting from the drop down list
3. And further still it is highly recommended to check the Only Show Unassigned Work. This will result in showing only those requests that have NO mechanic assigned to perform them
4. Once the filter data is entered select the Show button.
5. The Task Tree will display the required result and the mechanic calendar will be displayed showing the schedulers trade mechanics and all work currently assigned to them.
  - To schedule assign a request to a mechanic to perform expand the Tree by selecting the 'arrow' icons next to the tasks until you see the gray – New Task and red – Trade bars. The Red bars are estimated hours for the trade based on the Type of Problem data entered on the request and also display the estimated hour it should take the mechanic to complete.
  - Click on red bar and hold the mouse button down while dragging the task to the cell in the calendar view for the day and mechanic you wish to assign and then let go of the button
  - The task can be moved from day to day or to a different mechanic just by clicking on it in the calendar view and dragging it to the new day or mechanic. Note: This is also how you would reassign a mechanics work to another mechanic
6. The calendar can be changed to show a single day, a 5 day week, a seven day week (default) or an entire month view. You can move forward and backward in any of these options by clicking on the <<Prev or Next>> buttons
7. If you want to edit the information about the assignment entry (ie. Scheduled hours) right click on the item in the calendar view and select Edit from the menu. You will be presented with the Schedule 1: form as show to the left and can change the scheduled hours and then save to commit the change. To get rid of an assignment altogether select Remove from the menu
8. The Show Details option on the right click menu will open a Information form showing more about the request
9. The Push Out option when selected prompts for the number of days to push the assigned tasks for that mechanic from the selected day of the current assignment. Selecting OK will then push ALL requests assign to that mechanic from that day and ALL beyond by the number of days entered.  
Note: The Push Out command does take into consideration weekends and holidays as entered in the system and will not schedule requests on those days



## 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-' menu. 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 categorized into 'Requested', 'Assigned to Work Order', 'Issued and In Process', and 'Completed'. Each row includes details like Site 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.

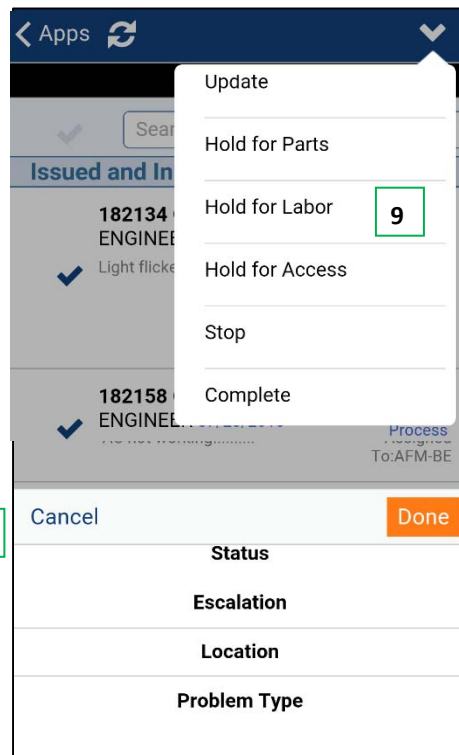
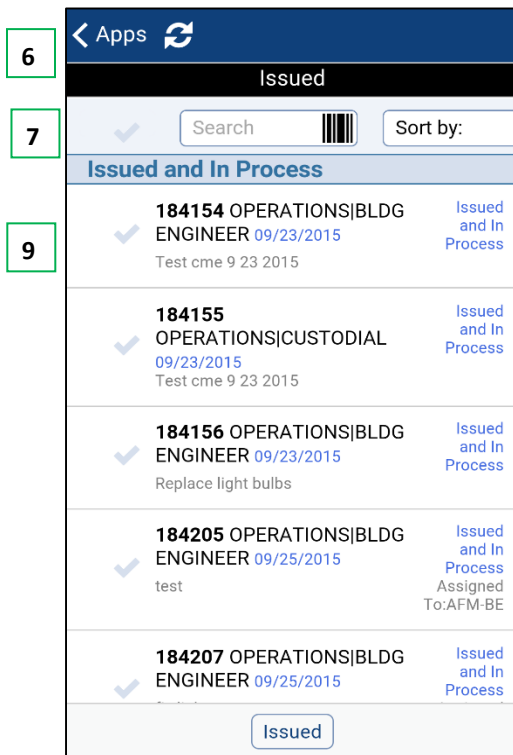
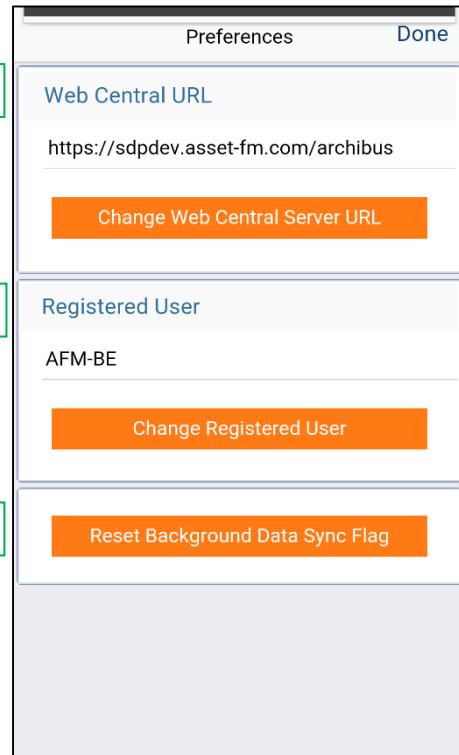
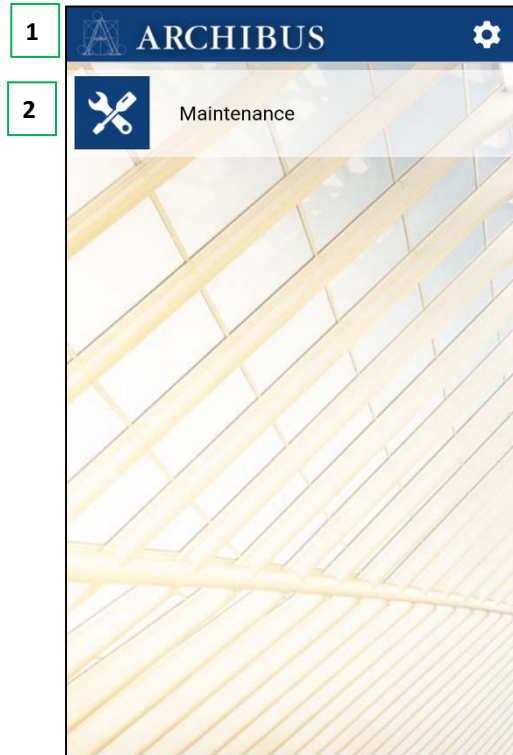
This screenshot shows a 'Select Value - Building Code' dialog box. It has a search field for 'Site Code' and a list of results. The results are organized in columns: Site Code, Building Code, and Building Name. The list includes entries like '5001101 A Step Ahead', '5001201 APH - Luzerne', '5001301 Bambi Day Care', '5001401 Community Concern', '5001501 Creative Children's Academy', '5001701 YEP / Discovery Place', '5002001 Grace Trinity', '5002101 Green Byrne', '5002301 Ken-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 options dialog. It contains several sections for filtering requests:
 

- 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, In Stock Not Reserved, Not in Stock, Reserved
- Estimated Cost**: Has Documents, Has Craftsperson Notes, Priority Determination
- Work Request Status**: Approved, Assigned, Issued, Stopped, On Hold, Completed
- Priority**: 1, 2, 3, 4, 5
- Escalated?**: checkbox

# Mobile



### 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...<sup>1</sup> 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
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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] [Save] 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 M
  - RADP

- Problem Task Cancel
- BACKFLOW PREVENTER- >
  - 9 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

