



Submitting and Reviewing Maintenance Requests in the
Facilities Work Order System

Agenda



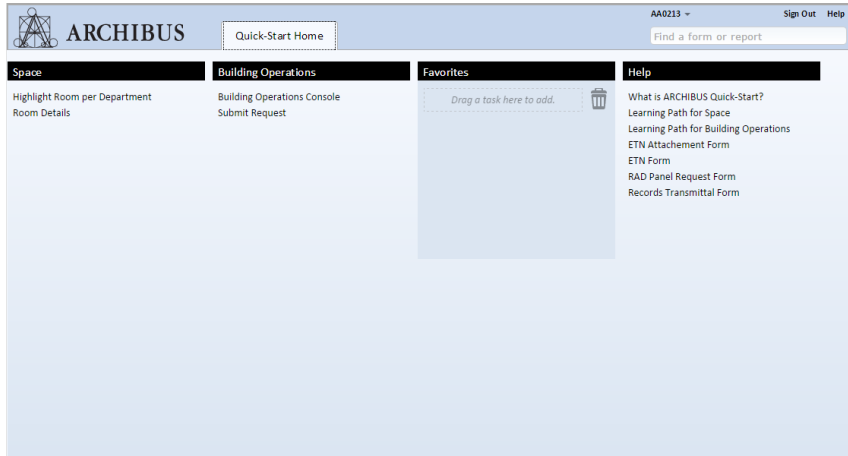
- 1. Logging into the Facilities Portal
- 2. Submit a Request
- 3. Your Building Operations Console
- 4. Review your Request
- 5. Provide Documents and Materials for your Request

Section 1: Logging into the Facilities Portal

Logging into the Facilities Portal: Overview

- The University is upgrading their Facilities Work Order System.
- The Work Order System is a UNTHSC intranet site and works using your EUID username and password.
- Access the work order system from the intranet page under Facilities Work Orders. Once we have the new easier to remember URL we will publish it on our website along with all training materials.

Logging into the Facilities Portal: Homepage



- Logging into the Work Order System will bring you to your Quick-Start Homepage
- Your homepage provides you with easy to access links which will allow you to submit Facilities Requests, download supplemental documents, and access space information such as Employee locations, and Building Floorplans
- Homepages respond to your role within the Work Order System so that different users may have different tools available to them.

Logging into the Facilities Portal: Homepage

The screenshot shows the ARCHIBUS homepage interface. At the top left is the ARCHIBUS logo. To its right is a 'Quick-Start Home' button. In the top right corner, the user's username 'AA0213' is displayed next to 'Sign Out' and 'Help' links. Below the header is a search bar with the placeholder text 'Find a form or report'. The main navigation bar is divided into four sections: 'Space', 'Building Operations', 'Favorites', and 'Help'. Each section has a numbered callout: 3 for Space, 4 for Building Operations, 5 for Favorites, and 6 for Help. The 'Space' section lists 'Highlight Room per Department' and 'Room Details'. The 'Building Operations' section lists 'Building Operations Console' and 'Submit Request'. The 'Favorites' section has a dashed box with the text 'Drag a task here to add.' and a trash icon. The 'Help' section lists several links: 'What is ARCHIBUS Quick-Start?', 'Learning Path for Space', 'Learning Path for Building Operations', 'ETN Attachment Form', 'ETN Form', 'RAD Panel Request Form', and 'Records Transmittal Form'.

1. Your Username Displays when you are logged in.
2. Search for any Task or Report from a single search box
3. Explore UNTHSC Space with access to floorplans and Employee Data
4. Submit a Facilities Request and access your Operations Console
5. Save a Task or Report to Favorites
6. Explore and Learn through System Help, and download Supplemental Materials

Section 2: Submit A Request

Submit A Request: Open Task

The screenshot shows the ARCHIBUS Quick-Start Home page. The header includes the ARCHIBUS logo, a 'Quick-Start Home' button, and a search bar with the text 'Find a form or report'. Below the header are four main panels: Space, Building Operations, Favorites, and Help. The 'Space' panel contains 'Highlight Room per Department' and 'Room Details'. The 'Building Operations' panel contains 'Building Operations Console' and 'Submit Request'. The 'Favorites' panel contains a dashed box with the text 'Drag a task here to add.' and a trash icon. The 'Help' panel contains 'What is ARCHIBUS Quick-Start?', 'Learning Path for Space', 'Learning Path for Building Operations', 'ETN Attachment Form', 'ETN Form', 'RAD Panel Request Form', and 'Records Transmittal Form'. A blue arrow with a red circle containing the number '1' points to the 'Submit Request' link in the Building Operations panel.

1. To submit a new Facilities Request click the “Submit Request” Task listed in the Building Operations panel of your Quick-Start Homepage.
2. Clicking this Task will open the new request dialog, and allow you to submit your new Request.

Submit a Request: Name and Phone

ARCHIBUS AA0213 Sign Out Help

Quick-Start Home Tasks Find a form or report

Submit Request

Requestor

1 Full Name* Avina,Aldo

Requestor Phone (10 Digit) or UNTHSC Extension 2

Location

Use your assigned workspace location

Location Where Work Originates* SITE BUILDING FLOOR ROOM

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

Request Description & Non Employee Contact

Description*

Select Description

Workflow
Response required within 7 Days
Workflow Steps:
On status of Requested: Edit and Approve is required by an employee with Service Desk Role Dispatch Users - Approve
On status of Approved: Dispatch is required by an employee with Service Desk Role Dispatch Users - Dispatch

Submit Cancel

1. When you initiate a request, your name will be automatically populated into the “Requested By” field. If you are submitting the request on behalf of another employee, you can click on the button on the right hand side of the form, to select another person. Please add the contact information to your description field if requesting for a person outside the UNTHSC network.
2. By default the phone number or extension listed in your employee record will be populated into the “Requestor Phone” field below your name. If no phone contact information appears, please fill in this field with your 10 digit phone number or UNTHSC extension.

Submit a Request: Location

The screenshot shows the ARCHIBUS 'Submit Request' form. At the top, there is a navigation bar with the ARCHIBUS logo, 'Quick-Start Home', 'Tasks', and a search bar. The main form is divided into sections: 'Requestor', 'Location', and 'Request Description & Non Employee Contact'. In the 'Requestor' section, the 'Full Name*' field contains 'Avina,Aldo'. In the 'Location' section, the 'Location Where Work Originates*' field is filled with 'ON-SITE', '0502', '02', and 'ROOM'. A 'Drawing' button is visible next to it. A blue arrow points from the 'Drawing' button to the 'Description*' field in the 'Request Description & Non Employee Contact' section. Three red circles with numbers 1, 2, and 3 are overlaid on the form: 1 is next to the 'Use your assigned workspace location' checkbox, 2 is next to the 'Description*' field, and 3 is next to the 'Drawing' button.

Requestor

Full Name* Avina,Aldo

Requestor Phone (10 Digit) or UNTHSC Extension

Location

Use your assigned workspace location

Location Where Work Originates* ON-SITE 0502 02 ROOM Drawing

Request Description & Non Employee Contact

Description*

Select Description

Workflow
Response required within 7 Days
Workflow Steps:
On status of Requested: Edit and Approve is required by an employee with Service Desk Role Dispatch Users - Approve
On status of Approved: Dispatch is required by an employee with Service Desk Role Dispatch Users - Dispatch

Submit Cancel

After filling completing the Requestor information, you will need to select a location.

1. The request will default to the space assigned to you, the employee, within the system, such as your office or cubicle. You can toggle this on and off with the included checkbox.
2. If you want to select a different space, you can click boxes by Building, Floor, or Room and you can select the correct spaces from the pop-up dialogs which display.
3. If you would like to search for Locations graphically, populating a building and floor will cause a "Drawing" button to appear, which will allow you to view a drawing of the floor and select a space

Be as specific as possible with the location of your issue. If your issue impacts multiple spaces, simply choose the floor or building effected and where the work starts, and describe the other effected spaces in the description field below.

Submit a Request: Location - Drawings



When the “Drawing” button is selected from the location panel, a floorplan of the selected floor will be displayed.

1. Use the drawing controls on the right hand side of the panel to navigate the space. You can click and drag the floorplan to pan, and zoom in and out using your mouse wheel or slider.
2. Room numbers are displayed inside of their respective spaces, clicking the room number will select the space and close the drawing panel.

Submit a Request: Location - Drawings

ARCHIBUS AA0213 Sign Out Help

Quick-Start Home Tasks Find a form or report

Submit Request

Requestor

Full Name* Avina,Aldo

Requestor Phone (10 Digit) or UNTHSC Extension

Location

Use your assigned workspace location

Location Where Work Originates* ON-SITE 0502 02 ROOM Drawing

Building, floor, and room number are required to help us process your request.

Request Description & Non Employee Contact

1 Description* There is a light-bulb burned out,

Select Description

Workflow
Response required within 7 Days
Workflow Steps:
On status of Requested: Edit and Approve is required by an employee with Service Desk Role Dispatch Users - Approve
On status of Approved: Dispatch is required by an employee with Service Desk Role Dispatch Users - Dispatch

2 Submit Cancel

Once a location has been selected, the final step of the request process is to provide a description of the request.

1. Type a description of your request or issue. This is a required field for submission. Be as specific as possible to allow the facilities team to better respond to your request.
2. Once all required information has been provided, the “Submit” or “Cancel” buttons can be used to confirm or abandon your request.

Section 3: Your Building Operations Console

Building Operations Console: Open Task

The screenshot shows the ARCHIBUS interface with the following components:

- Header:** ARCHIBUS logo, "Quick-Start Home" button, user ID "AA0213", "Sign Out", and "Help" links. A search bar contains the text "Find a form or report".
- Space:** "Highlight Room per Department Room Details".
- Building Operations:** "Building Operations Console" and "Submit Request". A blue arrow points to this section with a red circle containing the number "1".
- Favorites:** A dashed box with the text "Drag a task here to add." and a trash icon.
- Help:** "What is ARCHIBUS Quick-Start?", "Learning Path for Space", "Learning Path for Building Operations", "ETN Attachement Form", "ETN Form", "RAD Panel Request Form", and "Records Transmittal Form".

1. To access your Building Operations Console click the “Building Operations Console” Task listed in the Building Operations panel of your Quick-Start Homepage.
2. Clicking this Task will open the console page, and allow you to review your open Requests.

Building Operations Console: Navigation

The screenshot shows the ARCHIBUS Building Operations Console interface. At the top, there is a navigation bar with the ARCHIBUS logo, a 'Quick-Start Home' button, a 'Tasks' dropdown, and a search box labeled 'Find a form or report'. The main content area is titled 'Building Operations Console' and features a 'Submit Request' button. Below this is a search and filter section with a 'Show' dropdown set to 'All', a 'Filter' button, and a 'Recent' dropdown. The search criteria include 'Building', 'Floor', 'Room', and 'Problem Type', with a 'More' button. A 'Group By' dropdown is set to 'Status'. Below the search section, there are several filterable columns: 'Work Request Code', 'Problem Type', 'Location', 'Work Description', 'Due Date', and 'Supervisor'. A table of 'Requested' items is displayed, with two rows highlighted in yellow. The first row has a request number '10' and a description 'lights out'. The second row has a request number '11' and a description 'flood'. A 'Total records: 2' summary is shown at the bottom of the table.

Work Request Code	Problem Type	Location	Work Description	Due Date	Supervisor
10		0502-02-226	lights out		
11		0502-02-216	flood		

1. The Console shows a list of all your open requests by status
2. From the console you can submit a new request by selecting the new request button.
3. Filter controls allow you to search your list of requests by property, such as location.
4. Click the “More” button for more restriction and filtering options
5. Clear any filters using the “Clear” button
6. View open request details by clicking a request number

Section 4: Review Your Request

Review Your Request: Selection

The screenshot shows the ARCHIBUS Building Operations Console interface. At the top, there is a navigation bar with the ARCHIBUS logo, a 'Quick-Start Home' button, a 'Tasks' dropdown, and a search bar containing 'Find a form or report'. The main header is 'Building Operations Console' with a 'Submit Request' button and a search icon. Below the header is a search and filter section with a 'Show' dropdown set to 'All', a 'Filter' button, and a 'Recent' dropdown. The search criteria include 'Building', 'Floor', 'Room', and 'Problem Type'. A 'Group By' dropdown is set to 'Status'. Below the search bar, there is a table of requested work items. The table has columns for 'Work Request Code', 'Problem Type', 'Location', 'Work Description', 'Due Date', and 'Supervisor'. The table is filtered to show 'Requested' items (2 total). The first row is highlighted in yellow and contains the request code '10', location '0502-02-226', and description 'lights out'. The second row contains the request code '11', location '0502-02-216', and description 'flood'. A red circle with the number '1' points to the first row, and a red circle with the number '2' points to the 'Filter' button.

Work Request Code	Problem Type	Location	Work Description	Due Date	Supervisor
10		0502-02-226	lights out		
11		0502-02-216	flood		

1. From your Building Operations Console view, click on a request number to open the request details view.
2. You can use a filter to help find a specific request from the request list.

Review Your Request: Overview

The screenshot shows the ARCHIBUS interface for a Work Request. The form is titled "Work Request" and is part of the "Building Operations Console". It contains the following fields and sections:

- Problem Section:** Includes "Work Request Code" (10), "Description" (lights out), "Problem Location", "Problem Type", and a "Comments" text area.
- More Information Section:** A list of expandable categories: History, Trades, Parts, Craftspersons, Tool Types, Tools, and Other Costs.
- Costs Section:** Divided into "Estimated Costs" and "Actual Costs".

Numbered callouts indicate key features:

- 1:** Points to the "Work Request Code" field.
- 2:** Points to the "Description" and "Problem Type" fields.
- 3:** Points to the "Comments" text area.
- 4:** Points to the "More Information" header.

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

Buttons at the bottom: Update Comments, Close

1. In the Work Request Details View, you can see a large amount of information related to your request.
2. The unique request number, problem type, and your problem description and location are listed under the "Problem" header.
3. You can add comments to your request by entering text in the "Comments" field and selecting "Update Comments" button at the bottom of the form.
4. Additional information, such as request documents can be found by expanding the "More Information" header.

Review Your Request: Details

ARCHIBUS Building Operations Console

AA0213 Sign Out Help

Quick-Start Home Tasks Find a form or report

Work Request

Problem Location
Comments: Only one of the two bulbs appears to be burnt out.

1 **More Information**

Service Request Code: 10
Requested by: 10424650
Priority: Default
Location: 0502-02-226
Account Code:
Status: Requested
Date to Perform: 8/20/2015

2 **Work Order**
Date Requested: 8/20/2015
Time Requested: 4:16 PM
Division Code: H29767
Department Code: H29767
Equipment Code:

3 Please use the below document upload controls to attach forms required for your request:
• ETN(Equipment/Furniture Moves)
• ETN Attachment(Equipment/Furniture Moves)
• Panel Request(RAD Panels Use)
• Diagrams(Setup)
• Transmittal Forms(Records Management)

Document 1: wr-10-doc1.pdf
Document 2: Upload a document
Document 3: Upload a document
Document 4: Upload a document

History
Trades

Update Comments Close

1. In the More Information panel, you can see more information related to your request.
2. You can see request submission details, as well as the account and department information associated with the request.
3. You can also see the request status, and can view and upload required documentation to your request.
4. Additional information, such as request documents can be found by expanding the “More Information” header.

Section 5:
Provide Documents and Materials
for your Request

Materials and Documents: Open File

The screenshot shows the ARCHIBUS web application interface. At the top, there is a header with the ARCHIBUS logo, a 'Quick-Start Home' button, and a search bar containing 'Find a form or report'. Below the header, there are four main panels: 'Space', 'Building Operations', 'Favorites', and 'Help'. The 'Help' panel is active and contains a list of links: 'What is ARCHIBUS Quick-Start?', 'Learning Path for Space', 'Learning Path for Building Operations', 'ETN Attachment Form', 'ETN Form', 'RAD Panel Request Form', and 'Records Transmittal Form'. A red circle with the number '2' is overlaid on the 'Help' panel, with blue arrows pointing to each of the seven links in the list.

1. When documentation is necessary for a specific kind of request, you can upload the required documents to your request record.
2. Some required forms have been added to your Quick-Start homepage, under the Help Panel including the forms for ETN's and ETN Attachments, RAD Panel Requests and Records Transmittals.
3. Click a form to Open it and Save it to your computer.

Materials and Documents: Save File to Computer

ARCHIBUS AA0213 Sign Out Help

Quick-Start Home Tasks Find a form or report

Print Form

**University of North Texas
Health Science Center at Fort Worth**

Equipment Transfer Notification

1) Prior to any move or transfer of any state owned property, complete this form and send the original form to the Office of Property Control and fax copy to ext. 0300.
2) It is the responsibility of the releasing department to initiate this form.

Tag No.	Asset Description	Serial No.	Current Location Building/Room No.	End User	New Location Building/Room No.	End User

If space is needed for additional items, use the Equipment Transfer Notification attachment with the listed items.

Reason for Move: Condition of Equipment

Who will move the asset Request No.

Department ID/Name

Department Chairman Signature Date

Notice for Transfer of Responsibility

From:

Department ID/Name

Department Chair Signature Date

To:

Department ID/Name

Navigation icons: Home, Back, Search, Print, Save

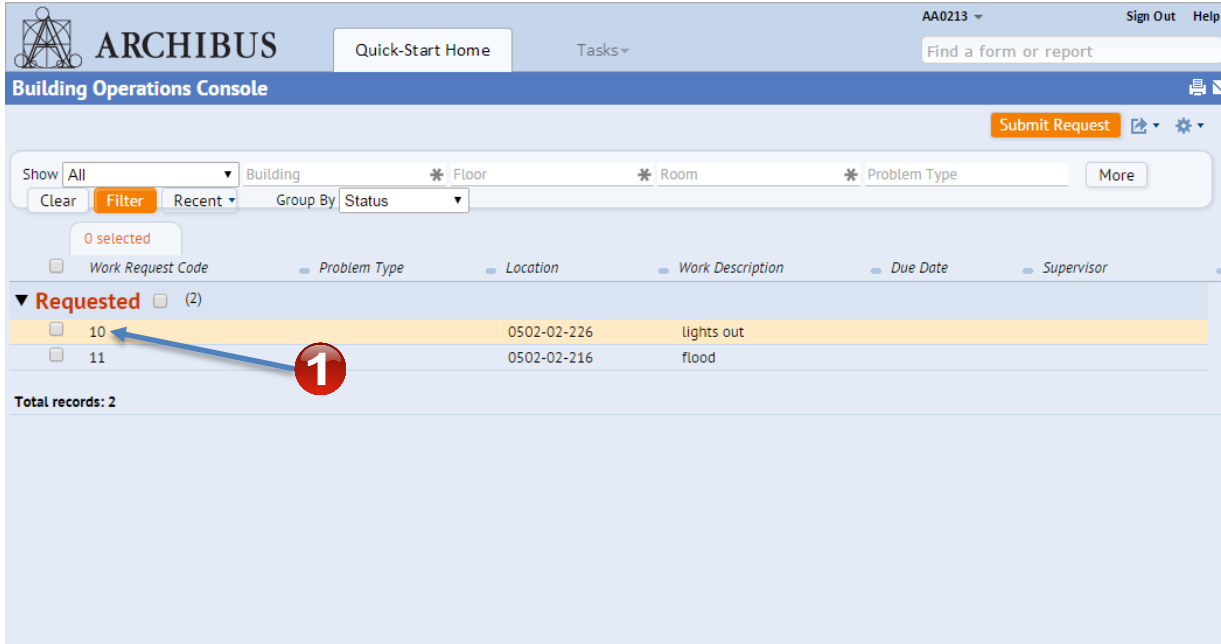
1. Depending on your browser settings, the selected from will either download automatically to your computer, or be opened for view in the application.
2. If the form opens in your browser you can print, or save the form to your local computer using the provided controls
3. If you print your form you must scan the form back into your local computer. All documents must be submitted to the work order system as digital file.

Materials and Documents: Open Console

The screenshot displays the ARCHIBUS web application interface. At the top left is the ARCHIBUS logo. To its right is a 'Quick-Start Home' button. Further right, the user ID 'AA0213' and 'Sign Out Help' links are visible. A search bar contains the text 'Find a form or report'. Below the header, there are four main navigation tabs: 'Space', 'Building Operations', 'Favorites', and 'Help'. The 'Space' tab contains 'Highlight Room per Department' and 'Room Details'. The 'Building Operations' tab is active and contains 'Building Operations Console' and 'Submit Request'. A blue curved arrow with a red circle containing the number '1' points from the 'Submit Request' link to the 'Building Operations Console' link. The 'Favorites' tab contains a dashed box with the text 'Drag a task here to add.' and a trash icon. The 'Help' tab contains a list of links: 'What is ARCHIBUS Quick-Start?', 'Learning Path for Space', 'Learning Path for Building Operations', 'ETN Attachment Form', 'ETN Form', 'RAD Panel Request Form', and 'Records Transmittal Form'.

1. Once the form has been completed you can upload the form to your request by navigating to the Building Operations Console

Materials and Documents: Open Request



The screenshot displays the ARCHIBUS Building Operations Console interface. At the top, there is a navigation bar with the ARCHIBUS logo, a 'Quick-Start Home' button, a 'Tasks' dropdown, and a search field containing 'Find a form or report'. The main header is 'Building Operations Console' with a 'Submit Request' button and a 'More' dropdown. Below the header, there are search filters for 'Building', 'Floor', 'Room', and 'Problem Type', along with a 'Group By' dropdown set to 'Status'. A table of work requests is shown, with the first row highlighted in yellow. A red circle with the number '1' and an arrow points to the first row of the table.

Work Request Code	Problem Type	Location	Work Description	Due Date	Supervisor
<input type="checkbox"/> 10		0502-02-226	lights out		
<input type="checkbox"/> 11		0502-02-216	flood		

Total records: 2

1. Select the work request you would like to upload the form to from your list of open requests.

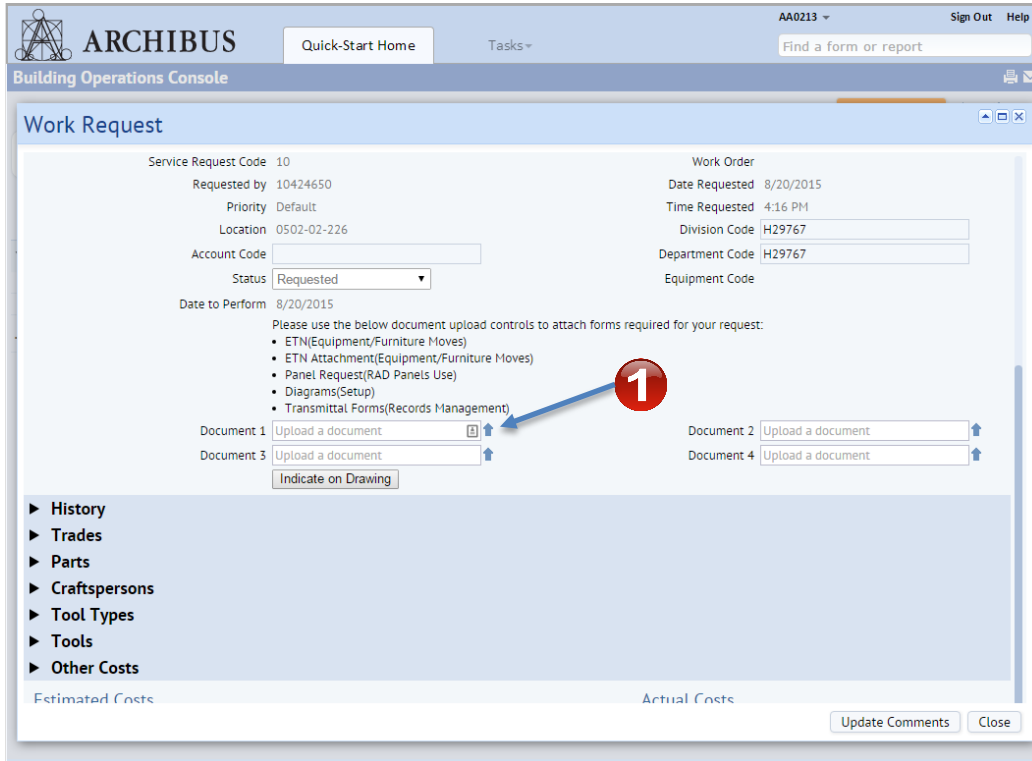
Materials and Documents: Navigate to Upload

The screenshot shows the ARCHIBUS Building Operations Console interface. At the top, there is a navigation bar with the ARCHIBUS logo, a search bar containing "Find a form or report", and user options "Sign Out" and "Help". Below this is a "Quick-Start Home" button and a "Tasks" dropdown menu. The main content area is titled "Work Request" and contains a "Problem" section with fields for "Work Request Code" (10), "Description" (lights out), "Problem Location", and "Problem Type". A "Comments" text area is also present. A red circle with the number "1" is positioned to the left of the "More Information" panel, which is expanded to show a list of sub-panels: "More Information", "History", "Trades", "Parts", "Craftspersons", "Tool Types", "Tools", and "Other Costs". Below the list is a table with two columns: "Estimated Costs" and "Actual Costs". The table contains rows for "Estimated Cost of Labor", "Estimated Cost of Parts", "Estimated Cost of Tools", "Estimated Other Costs", and "Estimated Total Cost", each with a corresponding "Actual Cost" value of 0.00. At the bottom right of the form are "Update Comments" and "Close" buttons.

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

1. Expand the “More Information” panel from the work request details page.

Materials and Documents: Upload Pt. 1



ARCHIBUS Building Operations Console

Quick-Start Home Tasks Find a form or report

AA0213 Sign Out Help

Work Request

Service Request Code 10

Requested by 10424650

Priority Default

Location 0502-02-226

Account Code

Status Requested

Date to Perform 8/20/2015

Work Order

Date Requested 8/20/2015

Time Requested 4:16 PM

Division Code H29767

Department Code H29767

Equipment Code

Please use the below document upload controls to attach forms required for your request:

- ETN(Equipment/Furniture Moves)
- ETN Attachment(Equipment/Furniture Moves)
- Panel Request(RAD Panels Use)
- Diagrams(Setup)
- Transmittal Forms(Records Management)

Document 1 Upload a document

Document 2 Upload a document

Document 3 Upload a document

Document 4 Upload a document

Indicate on Drawing

History

Trades

Parts

Craftspersons

Tool Types

Tools

Other Costs

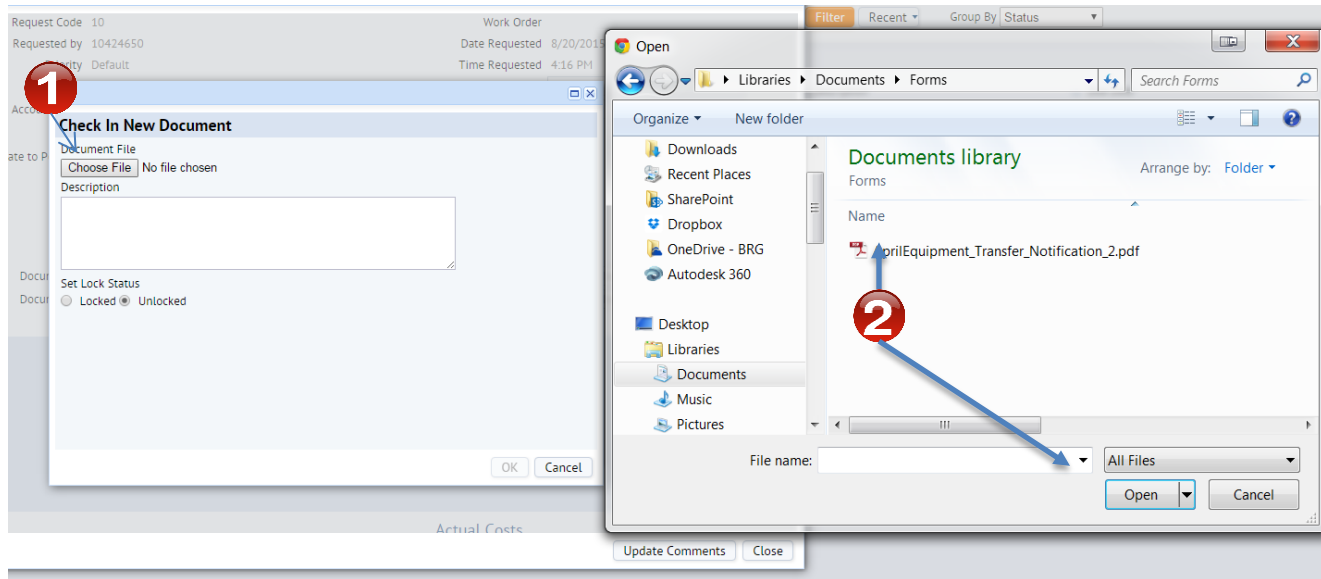
Estimated Costs Actual Costs

Update Comments Close

1. Select the “Upload” arrow control displayed next to one of the four available document slots. This will open the “Check In New Document” page for your Work Request.

Materials and Documents: Upload Pt. 2

1. From the Check In New Document page, select the “Choose File” control to search for your saved file on your local computer.
2. Navigate to and select the document you wish to upload.
3. Provide a Description of your file in the provided panel.



4. Click “OK” to finalize the upload of your document to the Work Request.

Materials and Documents: Upload Pt. 3

The screenshot shows a 'Work Request' interface with a 'Check In New Document' dialog box overlaid. The dialog box contains the following elements:

- Document File:** A 'Choose File' button followed by the text 'image12447.pdf'.
- Description:** A text area with the text 'The system will store this file under the names: wr-30583-doc1.pdf' and a 'Description' label.
- Set Lock Status:** Radio buttons for 'Locked' and 'Unlocked', with 'Unlocked' selected.
- Buttons:** 'OK' and 'Cancel' buttons at the bottom right.

Red circles with numbers 3 and 4 are overlaid on the image. Circle 3 points to the 'Description' text area, and circle 4 points to the 'OK' button.

3. Provide a Description of your file in the provided panel if you think it is needed.
4. Click "OK" to finalize the upload of your document to the Work Request.

Materials and Documents: Review Document

The screenshot displays the ARCHIBUS Building Operations Console interface. At the top, the logo and name 'ARCHIBUS' are visible, along with navigation links like 'Quick-Start Home' and 'Tasks'. A search bar contains the text 'Find a form or report'. The main content area is titled 'Work Request' and includes a 'Problem Location' section with a 'Comments' field containing the text 'Only one of the two bulbs appears to be burnt out.' Below this is a 'More Information' section with various fields for 'Service Request Code', 'Requested by', 'Priority', 'Location', 'Account Code', 'Status', 'Date to Perform', 'Work Order', 'Date Requested', 'Time Requested', 'Division Code', 'Department Code', and 'Equipment Code'. A list of document upload controls is shown, with 'Document 1' containing the file 'wr-10-doc1.pdf' and a set of icons (document, up, down, lock, delete). A red circle with the number '1' and an arrow points to the 'Document 3' upload control, which is currently empty and labeled 'Upload a document'. Other document slots (2 and 4) are also empty and labeled 'Upload a document'. At the bottom, there are 'Update Comments' and 'Close' buttons.

1. Your document will be uploaded to the document slot, and document controls, allowing you to view, replace, lock and remove your document will be displayed next to the file.

Thank You

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