Campus Assist

User Guide:

Work Request Management
## Document Edition Control

**Document Name:** Campus Assist, User Guide – Create Work Request  
**Current Version:** 2.1  
**Authors(s):** COS Learning & Development Officer, ICT Change Analysts

<table>
<thead>
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<th>Version</th>
<th>Date</th>
<th>Created By</th>
<th>Reason for Change</th>
<th>Document Status</th>
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<tr>
<td>0.1</td>
<td>Aug 2019</td>
<td>Cameron McGregor</td>
<td>New Document</td>
<td>Draft</td>
</tr>
<tr>
<td>1.0</td>
<td>Sep 2019</td>
<td>Cameron McGregor</td>
<td>Final</td>
<td>Issued</td>
</tr>
<tr>
<td>1.1</td>
<td>Sep 2019</td>
<td>Cameron McGregor</td>
<td>Minor Amendments</td>
<td>Issued</td>
</tr>
<tr>
<td>2.0</td>
<td>Jan 2023</td>
<td>Rychelle Walker</td>
<td>Archibus Upgrade</td>
<td>Draft</td>
</tr>
<tr>
<td>2.1</td>
<td>Feb 2023</td>
<td>Althea Iligan</td>
<td>Archibus Upgrade</td>
<td>Draft</td>
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1. Purpose

The purpose of this document is to provide instruction on how manage Work Requests in the Campus Assist system, including:

Navigation – How to access Campus Assist and to identify the correct tools available to you.

Work Request – Understand the workflows involved in managing both On Demand and Planned Preventative Maintenance requests.

Roles – Know who is responsible for which activities at each stage of the Work Request workflow.

This document is designed to function as a step-by-step reference guide for most standard activities that need to occur in the management of Work Requests.

Where known exceptions occur, they are identified and explained in identifiable notes throughout this document.
## Archibus General Information

### 2.1. Roles and Responsibilities

An explanation of key system roles and whether they are filled by internal personnel (staff) or by external personnel (contractors).

<table>
<thead>
<tr>
<th>Role</th>
<th>Staff/Contractor</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Requestor</td>
<td>Both</td>
<td>Everyone has ability to submit a Work Request</td>
</tr>
<tr>
<td>COS Supervisor</td>
<td>Staff</td>
<td>Responsible for:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Review and action submitted Work Requests</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Assign WR to contractor</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Approve contractor estimates (where applicable)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Issue WR to contractor</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Review and action any On Hold WRs</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Verify Completed WRs</td>
</tr>
<tr>
<td>COS Scheduler</td>
<td>Staff</td>
<td>Responsible for:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Scheduling PPM Work Requests</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Generating and Assigning WRs to Contractor</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Reviewing contractor PM Scheduling (where applicable)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Reviewing contractor On Demand scheduling (where applicable)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Reschedule an On Hold WRs</td>
</tr>
<tr>
<td>Contractor Supervisor</td>
<td>Contractor</td>
<td>Responsible for:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Add estimates to assigned WRs (where applicable)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Add scheduling to assigned WRs (where applicable)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Update WR as required:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• On Hold... (as required)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Complete WR</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Add/Review chargeable costs</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Ready for Payment</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Resolve any WRs disputed for payment</td>
</tr>
<tr>
<td>Contractor Craftsperson</td>
<td>Contractor</td>
<td>Using mobile client, responsible for:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Update WR with time worked</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Update WR with other costs</td>
</tr>
</tbody>
</table>
2.2. Terminology

Provide a point of reference for key terminology used in this document, and an overview of some core system functionality.

<table>
<thead>
<tr>
<th>Phrase</th>
<th>Description</th>
</tr>
</thead>
</table>
| Work Request | A Work Request is a request for maintenance, or repair work, or for a service to be performed. All Work Requests are reviewed by COS and ultimately assigned to a contractor who will be responsible for the completion of the prescribed activity. Work Requests will originate in one of 2 ways:
  • As a result of an actual request by an actual user
  • By the system in the form of planned, scheduled activities. |
| Work Order   | A Work Order is a grouping of Work Requests, assigned to a unique Work Team.                                                                   |
| PM (PPM)     | Planned Preventative Maintenance (PPM) is the scheduling of regular maintenance or service type activities that are performed based upon a desired frequency. |
| On Demand    | On Demand request are requested by an individual user, either;
  • As a request for COS to repair something or to provide a service.
  • Or, as a result of conducting PPM |
| Procedure    | Procedures must be defined for planned preventative maintenance (PPM) tasks, such as safety checks, cleaning projects, filter replacements, and daily security tasks. Procedure should be written so that the procedure can apply to multiple locations or equipment items. As part of setting up procedures, you can define the resources required for executing the procedure, such as the types of labour and tools required. |
| SLA          | A service level agreement defines the lifecycle and workflow of a work request. The SLA defines rule mechanisms for such information as:
  • the service provider (external vendor or employee) to complete the task
  • the service window for completing and responding to the task
  • procedures for approving the Work Request |
<table>
<thead>
<tr>
<th>Section</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Work Team</td>
<td>A work team can be based on a specialized trade or on a site or building. Within the Maintenance Console, contractors are typically assigned to a Work Team that aligns to their company name. In assigning a Work Request to that Work Team, only personnel from the nominated company will have access to the Work Request. If a COS supervisor is on multiple teams, he or she can see and manage work for those teams, and craftsperson can be assigned work for any of the work teams they are on.</td>
</tr>
<tr>
<td>Trade</td>
<td>A Trade relates to a generic role as opposed to a specific human. Typically, Trades will be used in the estimating process. A contractor will assign specific trades to the request for an amount of time that they determine is required to complete the nominated works. A trade will also have specific hourly rates loaded into Archibus that align with the contract under which they are engaged.</td>
</tr>
<tr>
<td>Craftsperson</td>
<td>A craftsperson is an individual human who can be assigned to a Work Request. Each craftsperson has a unique code and are grouped into a Work Team that relates to their parent company. A Craftsperson cannot be assigned to Work Requests that haven’t been issued to their respective Work Team. A craftsperson will also have specific hourly rates loaded into Archibus that align with the contract under which they are engaged.</td>
</tr>
<tr>
<td>Parts</td>
<td>Adding Parts to a Work Request allows the contractor to provide estimated and actual costs to that Work Request. Parts are preloaded into Archibus and each part has an agreed upon price associated with it.</td>
</tr>
<tr>
<td>Other Costs</td>
<td>Adding Other Costs to a Work Request allows the contractor to provide estimated and actual costs to that Work Request. Other Costs is not restricted by background Archibus data, meaning that a contractor can add any type of cost into this category. Evidence of costs should be attached to the request to support the claim for reimbursement of these costs.</td>
</tr>
<tr>
<td>Estimate Costs</td>
<td>Estimate Costs are derived from the Scheduling process. Once approved by a COS Supervisor they are locked in place and cannot be amended by the contractor.</td>
</tr>
<tr>
<td>Actual Costs</td>
<td>Actual Costs are derived from the actual data entered at the completion of the Work Request. This will be done by either the contractor supervisor, or the craftsperson on site.</td>
</tr>
<tr>
<td>Chargeable Costs</td>
<td>Chargeable Costs are what COS will pay the contractor for the successful completion of a Work Request. Depending on the Cost Type assigned to the Work Request, the Chargeable Cost may be locked down to be the Estimated Cost, or it may be the Actual Cost. It is important to know the difference and to look out for any discrepancies between the 3 different cost fields when approving Work Requests for payment.</td>
</tr>
<tr>
<td>---</td>
<td>---</td>
</tr>
<tr>
<td>Cost Types</td>
<td>Determines how costs are calculated and what data will be included in calculating total billable cost.</td>
</tr>
<tr>
<td>Cost Type – Schedule of Rates by Role</td>
<td>This is required when the works completed will be charged based on the job (role) being done regardless of the person doing the work. Charges will default to the estimate unless the actuals are updated.</td>
</tr>
<tr>
<td>Cost Type – Schedule of Rates by Human</td>
<td>This is required when the works completed will be charged based on the person doing this work. This is calculated as per the set rates assigned to this person regardless of what job they do.</td>
</tr>
<tr>
<td>Cost Type – Target Cost Estimate</td>
<td>This is the same as Schedule of Rates by Human in terms of calculation. However, if the actual costs exceed the estimation costs, this will result in a KPI penalty.</td>
</tr>
<tr>
<td>Cost Type – Quoted</td>
<td>Chargeable Costs will reference the Estimate Costs only. Work Requests assigned to this Cost Type must be estimated and approved prior to Issuing the Work Request to the contractor. Any costs that the contractor assigns in the Actual Cost fields will not be used for billing purposes. This is typically used for Ad-hoc requests, and when there are no agreed rates available.</td>
</tr>
<tr>
<td>Cost Type – PPM Cost</td>
<td>This is the same as Quote in terms of calculation. This however will only be used for PM Work Requests.</td>
</tr>
<tr>
<td>Cost Type – Nil Cost</td>
<td>Regardless of what information is entered into the Estimate or Actual cost fields, $0 cost will be calculated for this Work Request.</td>
</tr>
<tr>
<td>Status</td>
<td>The status is a means of understanding where a Work Request currently resides in the workflow and the next actions that need to occur, and who is responsible for performing those actions.</td>
</tr>
<tr>
<td>Status – Requested</td>
<td>When a Work Request is first created, it is in the Requested status. The original Requestor may continue to update the specifics of the Work Request until the point where it is Approved by COS.</td>
</tr>
<tr>
<td>Status - Rejected</td>
<td>After a Work Request has been reviewed by COS, it can be moved to the Rejected status. The Requestor is able to amend this Work Request as may be required, and can re-submit it for further assessment by COS. It will re-enter the Maintenance Console at the Requested Status.</td>
</tr>
</tbody>
</table>
### Status – Approved
After a Work Request has been reviewed by COS, it can be moved to the Approved status.

### Status – Assigned to Work Order
Work Requests that have gone through the estimating and scheduling steps (if required), COS will assign the Work Request to a new Work Order, or an existing Work Order.

### Status – Issued and in Process
Work Requests in this status have been Issued to a contractor. It is the contractor’s responsibility to manage these Work Requests through to completion.

### Status – On Hold....
There are a number of on Hold statuses. Contractors can put a Work Request into an On-Hold status if they are unable to complete the Work Request within the agreed upon timeframe due to factors outside of their control.

### Reschedule Status – Reschedule Required
As a result of being put into an On-Hold status, another status category is applied to the Work Request. Reschedule Required signifies that COS must review the Work Request and determine if the move to On Hold is justified or not.

### Reschedule Status – COS Approved
If COS agrees with the change of a Work Request to On Hold, then they will change the Reschedule Status to COS Approved.

### Reschedule Status – Not COS Approved
If COS is not in agreement with the change of a Work Request to On Hold, then they will change the Reschedule Status to Not COS Approved.

### Revised Due Date
After a Work Request has been put into an On-Hold status, and the Reschedule Status updated, the COS Scheduler will assign a Revised Due Date. This is the new date that the Work Request must be completed by.

### Status - Completed
When the task, or activity has been completed, the Contractor will update the Work Request status to Completed.

### Ready for Review for Payment
Once a Work Request is Completed and all costs have been added, then the contractor can flag the Work Request as Ready for Review of Payment. This signifies that there is no further information to be added and the contractor is ready to be paid. The Work Request is locked out for the contractor from this point onwards.

### Verify
After a Work Request has been Completed, there is a physical checking process whereby COS must verify that the work has been completed and to a satisfactory standard.

### Payment Status – Approved
After the Contractor has flagged a Work Request as Ready for Review of Payment, COS will review the Work Request and determine if the costs are acceptable. If so, the Work Request will be Approved for Payment.

### Payment Status – Disputed by COS
After the Contractor has flagged a Work Request as Ready for Review of Payment, COS will review the Work Request and
determine if the costs are acceptable. If not, the Work Request will be Disputed for Payment.

**Payment Status – Dispute Resolved**

Work Requests that have been disputed for payment by COS need to be amended by the contractor. After they have resolved any outstanding issues, they change the payment status to Dispute Resolved. This prompts further review by COS.

**Invoice Certificate**

Invoice Certificates are issued monthly to contractors. Certificates include all Work Requests that have been completed, verified and Payment Approved. The contractor will return a tax invoice for payment based on the “Pre-Approved” value displayed on the Invoice Certificate.

**Status – Closed**

After Invoice Certificate are issued and Tax Invoices submitted for payment, then the Work Request will be updated to Closed Status. No further changes can occur to this Work Request by anyone. It will be moved to the Archive Table.

**Estimate**

A step where the contractor may be required to estimate costs prior to the Work Request being Issued to them.

**Schedule**

A step where the contractor may be required to schedule resources prior to the Work Request being Issued to them.

**Work Notes**

A section where the contractor can add comments to the Work Request to document activities performed, problems encountered, and any reason why a Work Request may have been put On Hold. Work Notes are not customer facing, they are only visible between COS and the Contractor.

**Customer Facing Comments**

Similar to Work Notes but be aware that any content in these fields is also visible to the requestor.

**Priority**

All Work Requests are submitted with a Priority level that is determined by the requestor. Priority levels are reviewed by COS before being Approved. Priority levels determine the timeframe in which the Work Request must be actioned and completed.

**Priority 1**

Priority 1 is for urgent requests and has very tight timeframes that must be adhered to.

**Priority 2**

A step below urgent, but still a high priority.

**Priority 3**

Middle level priority, most commonly used as a default priority.

**Priority 4**

Lower priority or Deferred Maintenance.

**Priority 5**

Priority 5 is for the least urgent of requests and has generous timeframes that are be adhered to.

**Save – Priority**

In order to effect a change in priority without actually approving a Work Request, then changing the Priority level and using the Save feature will update the Priority level.
<table>
<thead>
<tr>
<th><strong>Save - Location</strong></th>
<th>In order to effect a change in location without actually approving a Work Request, then changing the Location fields and using the Save feature will update the Location.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Due Date</strong></td>
<td>The Due Date is derived from the Priority level selected and the corresponding SLAs for that particular Problem Type.</td>
</tr>
<tr>
<td><strong>Bulk Actions</strong></td>
<td>Multiple Work Requests can be selected within the Maintenance Console. Where there are common actions, it is possible to perform those actions against all selected Work Requests at once.</td>
</tr>
<tr>
<td><strong>Soft Services</strong></td>
<td>A COS service line that incorporates services such as Cleaning and Waste Removal.</td>
</tr>
<tr>
<td><strong>Hard Services</strong></td>
<td>A COS service line that incorporates typical maintenance services such as Electrical, Mechanical, Fire, Plumbing etc.</td>
</tr>
<tr>
<td><strong>Security Services</strong></td>
<td>A COS service line that provides services such as patrol, guarding, keys, electronic locks etc.</td>
</tr>
</tbody>
</table>
### 2.3. Cost Types

#### Nil Costs

<table>
<thead>
<tr>
<th>Description</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nil Costs</td>
<td>Regardless of what information is entered into the Estimate or Actual cost fields, $0 cost will be calculated for this Work Request.</td>
</tr>
</tbody>
</table>

**Example**

If we already pay for a security guard to patrol the campus and whilst they are doing this job, they need to install a bollard requested by a Faculty, then this work will not be charged by the contractor.

COS can however use the actual costs recorded in Archibus to then recoup the costs from the Faculty.

#### Chargeable Cost

<table>
<thead>
<tr>
<th>Description</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>$0.00</td>
<td>Labour costs are driven from the craftsmen but will be charged at a $0 value.</td>
</tr>
</tbody>
</table>

#### Problem Types

<table>
<thead>
<tr>
<th>Problem Types</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>AUTO DOORS</td>
<td>LIGHTING</td>
</tr>
<tr>
<td>BLDG ACCESS CARDS</td>
<td>LINEN</td>
</tr>
<tr>
<td>BUILDING</td>
<td>LOCKSMITHING</td>
</tr>
<tr>
<td>CAMPUS ASSIST</td>
<td>LOCKSMITHING</td>
</tr>
<tr>
<td>CLEANING GENERAL</td>
<td>LOCKSMITHING</td>
</tr>
<tr>
<td>CONFIDENTIAL WASTE</td>
<td>MECHANICAL SERVICES</td>
</tr>
<tr>
<td>CRANES AND HOISTS</td>
<td>PEST CONTROL SERVICES</td>
</tr>
<tr>
<td>DECONTAMINATION</td>
<td>PLUMBING SERVICES</td>
</tr>
<tr>
<td>ELECTRICAL SERVICES</td>
<td>ROOF AND GUTTER</td>
</tr>
<tr>
<td>ELECTRONIC AUTO DOORS</td>
<td>ROOF SAFETY SECURITY SERVICES including secondary problem types</td>
</tr>
<tr>
<td>ELECTRONIC SECURITY</td>
<td>SIGNAGE</td>
</tr>
<tr>
<td>EMERGENCY AND EXIT LIGHTING</td>
<td>STORES AND DOCK</td>
</tr>
<tr>
<td>FIRE SERVICES</td>
<td>TEST AND TAG</td>
</tr>
<tr>
<td>GROUNDS including secondary problem types</td>
<td>WASTE BIOLOGICAL AND CLINICAL</td>
</tr>
<tr>
<td>FUME CUPBOARD</td>
<td>WASTE GENERAL</td>
</tr>
<tr>
<td>HAZARDOUS CHEMICAL WASTE</td>
<td>WATER TREATMENT</td>
</tr>
<tr>
<td>LAUNDRY</td>
<td>TEST AND TAG</td>
</tr>
<tr>
<td>LIFT SERVICES</td>
<td>TRAFFIC AND PARKING including secondary problem types</td>
</tr>
</tbody>
</table>

#### Schedule of Rates by Human

<table>
<thead>
<tr>
<th>Description</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Schedule of Rates by Human</td>
<td>This is required when the works completed will be charged based on the person doing this work.</td>
</tr>
</tbody>
</table>

The is as per the set rates assigned to this person regardless of what job they do.
### Example

If there is a job requiring someone to fix the air conditioner, then depending on the person who completes the work will depend on what is charged. For example, if the apprentice completes the work, then it will be the actual hours x apprentice rates.

### Chargeable Cost

This matches the Actual Cost

Labour costs are driven from the craftspersons.

### Problem Types

<table>
<thead>
<tr>
<th>AUTO DOORS</th>
<th>LAUNDRY</th>
</tr>
</thead>
<tbody>
<tr>
<td>BUILDING</td>
<td>LIFT SERVICES</td>
</tr>
<tr>
<td>CLEANING GENERAL</td>
<td>LIGHTING</td>
</tr>
<tr>
<td>CONFIDENTIAL WASTE</td>
<td>LINEN</td>
</tr>
<tr>
<td>CRANES AND HOISTS</td>
<td>LOCKSMITHING including secondary problem types</td>
</tr>
<tr>
<td>DECONTAMINATION</td>
<td>MECHANICAL SERVICES</td>
</tr>
<tr>
<td>ELECTRICAL SERVICES</td>
<td>PEST CONTROL SERVICES</td>
</tr>
<tr>
<td>ELECTRONIC AUTO DOORS</td>
<td>PLUMBING SERVICES</td>
</tr>
<tr>
<td>ELECTRONIC SECURITY</td>
<td>ROOF AND GUTTER</td>
</tr>
<tr>
<td>EMERGENCY AND EXIT LIGHTING</td>
<td>ROOF SAFETY</td>
</tr>
<tr>
<td>FIRE SERVICES</td>
<td>STORES AND DOCK</td>
</tr>
<tr>
<td>FUME CUPBOARD</td>
<td>TEST AND TAG</td>
</tr>
<tr>
<td>GROUND including secondary problem types</td>
<td>WASTE GENERAL</td>
</tr>
<tr>
<td>HAZARDOUS CHEMICAL WASTE</td>
<td>WATER TREATMENT</td>
</tr>
</tbody>
</table>

### Target Cost Estimate

**Description**

This is the same as Schedule of Rates by Human in terms of calculation. However, if the actual costs exceed the estimation costs, this will result in a KPI implication.

**Example**

If there is a job requiring someone to fix the plumbing issue, the contractor may advise that the works will take 2 hours of a senior technician, but ends of taking 3 hours, COS will still pay for 3 hours but the contractor will fail their KPIs for meeting their estimation target.

**Chargeable Cost**

This matches the Actual Cost

Labour costs are driven from the craftspersons.

**Problem Types**

<table>
<thead>
<tr>
<th>CONFIDENTIAL WASTE</th>
<th>LIGHTING</th>
</tr>
</thead>
<tbody>
<tr>
<td>CRANES AND HOISTS</td>
<td>LINEN</td>
</tr>
<tr>
<td>DECONTAMINATION</td>
<td>LOCKSMITHING</td>
</tr>
<tr>
<td>ELECTRICAL SERVICES</td>
<td>LOCKSMITHING</td>
</tr>
<tr>
<td>ELECTRONIC AUTO DOORS</td>
<td>LOCKSMITHING</td>
</tr>
<tr>
<td>ELECTRONIC SECURITY</td>
<td>MECHANICAL SERVICES</td>
</tr>
<tr>
<td>EMERGENCY AND EXIT LIGHTING</td>
<td>PEST CONTROL SERVICES</td>
</tr>
<tr>
<td>----------------------------</td>
<td>-----------------------</td>
</tr>
<tr>
<td>FIRE SERVICES</td>
<td>PLUMBING SERVICES</td>
</tr>
<tr>
<td>FUME CUPBOARD</td>
<td>ROOF AND GUTTER</td>
</tr>
<tr>
<td>GROUNDS</td>
<td>EXTERNAL SIGNAGE</td>
</tr>
<tr>
<td>GROUNDS</td>
<td>IRRIGATION</td>
</tr>
<tr>
<td>GROUNDS</td>
<td>LINE MARKING</td>
</tr>
<tr>
<td>HAZARDOUS CHEMICAL WASTE</td>
<td>WASTE BIOLOGICAL AND CLINICAL</td>
</tr>
<tr>
<td>LAUNDRY</td>
<td>WASTE GENERAL</td>
</tr>
<tr>
<td>LIFT SERVICES</td>
<td>WATER TREATMENT</td>
</tr>
</tbody>
</table>
### Quoted

<table>
<thead>
<tr>
<th>Description</th>
<th>This is when COS pay for the estimation cost only regardless of how much the actual costs result. This tends to be required when COS does not have agreed rates. This will be used for Adhoc works.</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Example</th>
<th>If there is a job which was quoted by the contractor for $40 and the works end up taking $80, COS will only pay $40 for the job.</th>
</tr>
</thead>
</table>

| Chargeable Cost | This matches the Estimate Cost  
Labour costs are driven from the estimated trades. |
|----------------|--------------------------------------------------------------------------------|

| Problem Type | CLEANING GENERAL | LIGHTING  
CONFIDENTIAL WASTE | LINEN  
CRANES AND HOISTS | LOCKSMITHING  
DECONTAMINATION | LOCKSMITHING | KEYS  
ELECTRICAL SERVICES | LOCKSMITHING | LOCKS  
ELECTRONIC AUTO DOORS | MECHANICAL SERVICES  
ELECTRONIC SECURITY | PEST CONTROL SERVICES  
EMERGENCY AND EXIT LIGHTING | PLUMBING SERVICES  
FIRE SERVICES | ROOF AND GUTTER  
FUME CUPBOARD | ROOF SAFETY  
GROUNDS | EASTERN AVE FLAG | SIGNAGE  
GROUNDS | EXTERNAL SIGNAGE | STORES AND DOCK  
GROUNDS | IRRIGATION | TEST AND TAG  
GROUNDS | LINE MARKING | TRAFFIC AND PARKING | SIGNAGE  
HAZARDOUS CHEMICAL WASTE | WASTE BIOLOGICAL AND CLINICAL  
LAUNDRY | WASTE GENERAL  
LIFT SERVICES | WATER TREATMENT |
### Schedule of Rates by Role

**Description**

This is required when the works completed will be charged based on the job (role) being done regardless of the person doing the work.

Charges will default to the estimate unless the actuals are updated.

**Example**

Unlike Schedule of Rates by Human where each person has a set rate regardless of the job they do, Schedule of Rates by Role is where chargeable costs will depend on the job they do, regardless of who does it.

For example, a guard doing patrol services will cost less than a guard working in the control room. A person may be qualified to do both jobs however depending on the job will depend on how the university is charged.

**Chargeable Cost**

This matches the Estimate Cost unless the Actual Costs are updated, then it will match the actual costs.

Labour costs are driven from the estimated and actual trades.

| Problem Types                  | CLEANING GENERAL | PM CLEANING CONSUMABLES | PM CONFIDENTIAL WASTE | PM GENERAL CLEANING | PM HAZARDOUS CHEMICAL WASTE | PM LINEN | PM PEST CONTROL SERVICES | PM SECURITY SERVICES | PM TRAFFIC AND PARKING | PM WASTE BIOLOGICAL AND CLINICAL | PM SECURITY SERVICES | PM SECURITY SERVICES|CUSTODIAN | SECURITY SERVICES|GUARDING | SECURITY SERVICES|OUT OF HOURS | SECURITY SERVICES|PATROL SERVICE | SECURITY SERVICES|TRAFFIC CTRL | TRAFFIC AND PARKING | TRAFFIC AND PARKING|BARRICADING | TRAFFIC AND PARKING|ENQUIRY | TRAFFIC AND PARKING|SIGNAGE | TRAFFIC AND PARKING|VIP EVENT |
### Description
This is the same as Quote in terms of calculation. This however will only be used for PM works.

### Example
If there is a job which was quoted by the contractor for $40 and the works end up taking $80, COS will only pay $40 for the job.

### Chargeable Cost
This matches the Estimate Cost

Labour costs are driven from the estimated trades.

#### Problem Types

<table>
<thead>
<tr>
<th>Problem Types</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>PM AUTOMATIC DOORS</td>
<td>PM MDI LAB SERVICES</td>
</tr>
<tr>
<td>PM BUILDING</td>
<td>PM MECHANICAL SERVICE</td>
</tr>
<tr>
<td>MANAGEMENT SYSTEM</td>
<td>PM OPEN SPACES</td>
</tr>
<tr>
<td>PM CRANES AND HOISTS</td>
<td>PM PLUMBING SERVICES</td>
</tr>
<tr>
<td>PM ELECTRICAL SERVICES</td>
<td>PM ROOF AND GUTTER</td>
</tr>
<tr>
<td>PM EMERGENCY AND LIGHTING</td>
<td>PM ROOF SAFETY</td>
</tr>
<tr>
<td>PM FIRE</td>
<td>PM SANITARY SERVICES</td>
</tr>
<tr>
<td>PM FUME CUPBOARD</td>
<td>PM SECURITY ADMIN</td>
</tr>
<tr>
<td>PM LIFT SERVICES</td>
<td>PM TEST AND TAG</td>
</tr>
<tr>
<td>PM LIGHTING</td>
<td>PM WATER TREATMENT</td>
</tr>
<tr>
<td>PM LINE MARKING</td>
<td></td>
</tr>
</tbody>
</table>
3. Navigation

**Objective**

Understand standard system navigation features.

### 3.1. Login

Campus Assist is accessible from the Staff Intranet ([https://intranet.sydney.edu.au](https://intranet.sydney.edu.au)). Campus Assist features under the Popular Systems section near the top of this web page.

The system will support Single Sign-On (SSO) when you are logged into the University network. Alternatively, you can manually login with your UniKey username and password.

For technical queries, or to request or change access, contact Shared Services for support.

### 3.2. Navigating the Task Menu

Campus Assist is underpinned by Archibus which works on a modular system. The menu features some universal functions such as Search, favourites, and each of the available modules, with access to these determined by your system role and permissions.

The homepage features a blue navigation pane located on the left-hand side of the page. This navigation pane acts as your central navigation point across the system.

Menu items expand outwards across the screen, and collapse to the left once a final selection is made or by reselecting the option you originally selected.

The entire panel can be collapsed to maximise screen size by using the left-arrow at the bottom of the panel.

#### 1. Search

The Search menu item allows for keyword search across the entire platform, spanning modules, reports, screens, and objects (data). The results and your access to them will be determined by your system role and permissions.
2. Favourites

The Favourites menu allows you to quickly access and navigate to your most frequently used pages and reports from the homepage. The menu will be blank if you are a new user.

You can populate it by selecting the star icon at the top-right of any screen or report.

To remove a favourited item, simply navigate to that page and deselect the star icon.
3. **Shortcuts**
Each menu option may display quick-access shortcuts for popular or frequently used areas of that module. These are managed by your system administrator or power user.

The Maintenance Console facilitates the submission and subsequent management of your Work Requests.

To access, navigate to the ‘Corrective Maintenance’ menu option and select ‘Maintenance Console from the menu items or the shortcuts list. Alternatively, use the Search function to search by key word.

**Tip!** To save this item for quick access later, use the Favourites star at the top-right of the page to add it to your Favourites menu.

To create and submit a Work Request, select the **Report Problem** (1) button at the top-right of the screen.

To review or provide feedback previously submitted Work Requests, use the **search bar and filters** (2) to find objects.
3.3. Filters

The Maintenance Console enables users to view and access Work Requests, regardless of status. This screen will appear blank by default when you first access the page. There are a few ways to access your Work Requests using various search and filter types. Please note, search results, and your access to them, will be determined by your system role and permissions.

1. Key Word
Across the top of the screen, use the global navigation bar to search by relevant keywords across all work requests. Simply type into the free-text field and hit enter on your keyboard.

2. Quick Filters
Select the grey Quick Filters button to access common and frequently used filters, such as your requests, or requests by a certain status. Simply select an option from the drop-down menu and your results will be returned in the Work Requests table.

Note: if you would like to combine Quick Filters and a standard filter field, for example, “10 Newest Requests” and Problem Type “Mechanical Services”, please filter results using the standard Filter panel first and then apply Quick Filters.

3. Filters
To further refine your search to return more targeted results, use the blue Filters button to expand the full filters menu. A panel will open on the right-hand side of the screen, displaying all available filters.

The panel is organised into groups, with collapsible menus of related items, such as fields for location data, people data, and other general Work Request fields. To expand an item, select the group’s heading.

You can select multiple filter options to expand or narrow your results. Once you have made your selections, select Apply at the top of the panel to view your results. If you make a mistake, or want to start again, select Clear or Cancel.

4. Additional View Options
   a. Group By
      By default, search results will appear grouped by their status (e.g., Approved, Rejected etc.). To change this, select the grey Group By: Status button, then select your desired grouping type from the drop-down menu to reorganise your results.
b. Customising your table view
   i. Sorting
   Across the top of the results table, each column can be sorted (ascending / descending order) using the arrow icons next to the table headers. Using these sort options will not affect your search results or previously set filters and groupings.

   ii. Add, remove, or reorder columns
   To customise the table view, select the **Options** button at the top-right of the screen, then go to ‘Select Work Request Fields’ from the drop-down menu.

   A pop-up screen will appear listing all available column options as well as those currently set.

   Use the Show, Hide, and Up and Down buttons to reorganise your view, then select **Update** to apply any changes.
3.4. Look-up Fields

If you are unsure of what to put into some code and status fields, look for the ellipses in the far-right by hovering over the field. Once visible, select the ellipses to launch another pop-up window containing a more detailed view of available codes and their values/names. Use the filters across the top of the table to search by number and keyword, or simply scroll the list using the right-hand scroll bar (where visible.)

The exception to this rule is Free Text fields where you are prompted to enter information of your choosing by typing directly into the field.
4. Maintenance Console

4.1. Introduction

To provide an overview of what the Maintenance Console is and what it is used for.

The Maintenance Console is a module within Archibus (Campus Assist) that allows you to manage Work Requests.

There are 2 types of Work Requests managed in the console; On Demand Requests and Planned Preventative Maintenance Requests.

- **On Demand Work Requests:**
  These request types are generated by a Requestor, typically based on a need to repair something, or to provide a service.

  These requests start life in the Maintenance Console and are managed through to completion.

- **Planned Preventative Maintenance (PPM) Work Requests:**
  Predominantly system-generated, these requests are based on a defined schedule that ties to a procedure which has been developed to maintain an asset, or to provide a regular service. PPM requests start life in the Maintenance Manager which is a different Archibus module to the Maintenance Console. Once the Work Request has been scheduled and assigned to Work Orders, they become available in the Maintenance Console to be managed through to completion.

The Maintenance Console allows for the following key activities to occur:

1. A Work Request to be created.
2. That Work Request to be reviewed and approved, and subsequently assigned to a Contractor.
3. The contractor is able to estimate their costs and to schedule labour resources.
4. COS can review the estimates and scheduling, then can Assign that Work Request to a Work Order for the Contractor. This means that the contractor can now commence that activity.
5. The contractor can autonomously manage their Work Requests in the Maintenance Console, adding actual labour and material costs, adding information and supporting documentation, and finally completing that Work Request.
6. The Maintenance Console provides mechanisms to verify the completion of Work Requests, along with the approval of costs for each work request.
7. Payment of completed Work Requests is facilitated through an Invoice Certificate process that also resides in Archibus, although not in the Maintenance Console.
4.2. Process Flow

The Maintenance Console aligns with the key activities required to manage On Demand work requests:

- **Requested**
  - Actions by Tech PM:
    - Cancel
    - Reject
  - Approve & Dispatch

- **Cancelled**
  - Request created and submitted by Requestor
  - Cancelled by Requestor

- **Rejected**
  - Requested by COS
  - Rejected by COS
  - Requestor can update and re-submit

- **Approved**
  - Actions by Tech FM:
    - Approve Estimate
    - Reject Estimate
  - Actions by Scheduler:
    - Approve Schedule
    - Reject Schedule
  - Actions by PM:
    - Issue Work Order

- **Assigned**
  - Actions by Tech FM:
    - Assign & Issue Work Order
  - Actions by PM:
    - Assign to Work Order after reviewing Estimates and Schedules

- **Issued**
  - Actions by Contractor:
    - Add Costs/Details etc.
    - Change Status
    - On Hold/Complied
    - Ready for Payment
  - Actions by COS:
    - Assign and Issue after reviewing Estimates and Schedules
  - Actions by Contractor:
    - Process with work

- **Stopped**
  - **Should not be used**

- **On Hold**
  - Actions by Scheduler:
    - Re-Schedule
  - Actions by Tech FM:
    - Approve
  - Actions by Contractor:
    - On hold for... Parts, Access, Labour?

- **Completed**
  - Actions by Tech FM:
    - Verify
  - Actions by COS:
    - Complete...BP?

- **Closed**
  - Actions by COS:
    - After Invoicing
5. Requested

5.1. Work Request submitted by Requestor

Objective

Create a Work Request

Role

Requestor

Overview

Anyone with access to the system is able to create and submit a Work Request. Work Requests are a means of requesting support or a service from COS.

All Work Requests are reviewed and processed by COS.

Next Step

Navigate to the Maintenance Console:

![Archibus Navigation](image)
From the Maintenance Console frame, select **Report Problem**:

The form is split into several sections:

- Requestor
- Location
- Equipment
- Problem
- Description

Each section contains some mandatory and optional fields that require completion.

1. **Section 1 – Requestor**
   
   Your contact details will automatically populate in the requestor section, pulling from your system profile. Review these to ensure correct before proceeding.

   If these are incorrect, incomplete, or you are raising a request on behalf of someone else, they should be modified prior to submission. To edit, simply begin typing directly into the fields.

   If you do not know the codes individually for fields such as ‘School Code’ or ‘Department Code’, use the ellipsis in the right-side of the field to open the search pop-up window. You can then use the Code or Name fields to search by number or keywords.
2. Section 2 – Location
The Location section allows you to detail the location of the problem for your request.

Use the checkbox to populate with your assigned workspace location (your default profile details), or manually populate each of the fields including:

- Site (campus)
- Building
- Floor
- Room

Use the free text field “Describe the Location” to provide any additional location details, such as the specific area in the room.

Note that you must provide Site and Building information. Floor and Room are optional fields. Values are validated against the database, by selecting the Building Code the correct Site Code will automatically populate if they do not align.

If you are unsure of the location codes, you can use the ellipsis within each code field to search by keyword or use the ‘Map’ button to open the digital map. This will default to your current location, navigate to the required location, then select ‘Save Location’ or ‘Close’ to return to the Work Request form.
3. Section 3 – Equipment
The Equipment section contains specialised fields that won’t be completed by most users. It is more commonly used by COS service technicians when reporting a fault relating to equipment identified during routine maintenance inspections. If you happen to know the code, populate it here, otherwise leave the section blank.

4. Section 4 – Problem
In this section, you identify 2 things:
- **Account Code** – If work is user funded, then a valid account code must be provided so that costs for non-SLA activities can be recovered by COS
- **Type of Problem** – This is important as it identifies the inherent nature of the request. It also determines who within COS will receive the submitted request.
- **Secondary Type of Problem** – Some problem types will allow you to select a secondary problem type, available in the drop-down menu immediately below the “Type of Problem” field

Note that a summary of available problem types and corresponding descriptions is available via the View All Problem Types button.
5. Section 5 – Description
In this section, provide details of the request and determine a priority.

- **Description** – Free text field where you can provide a detailed description of what you require.
- **Priority** – There are 5 levels (5 low – 1 high). Each priority will display related key SLA objectives. Select the Priority that best reflects your situation and requirements. Note that all priorities will be assessed by COS and adjusted as necessary before being assigned to a contractor.

6. Section 6 – Submit
In this section you can either:

- **Submit** – Once all required information has been provided, submit the request.
- **Add Documents** – Upload and attach any relevant supporting documentation if required.
- **Cancel** – If you do not wish to proceed, select the Cancel button.

After the request has been submitted, a pop-up window will display a confirmation and your Work Request reference number. You will also receive this information via system generated email.
5.2. COS - Review and Approve a Request

**Objective**
To review all submitted Work Requests and process appropriately.

**Role**
COS Supervisor

**Overview**
Using the Maintenance Console, the COS Supervisor will review all recently submitted Work Requests.

**Next Step**
Work Request can be Re-routed to an alternative service line, or Approved, or Rejected

Once a request has been submitted, it needs to be reviewed and actioned. This step is known as the “Approval” Step.

**Process**
Navigate to the Maintenance Console frame:

![Maintenance Console](image-url)
By default, this frame will provide users with access to all requests that align with their system access:

- **Requestors** – will see all requests that they have ever submitted
- **Contractors** – will see all requests that have been assigned to them
- **COS personnel** – will see all requests that are within their nominated area of control

As such, some roles will have access to a larger number of requests. Selecting the **Filters** button, without applying any data restrictions may cause this page to take a very long time to respond. It is advisable to set some data restriction prior to selecting the **Filters** button.

Note that this is the same frame that allows users to create new requests, via the **Report a Problem** button.

Click the collapse/expand arrow to show items in the filters.

Suggestions on how to use the filters:

- **General - Work Type** - will only display requests submitted within a particular work type.
- **General - Work Request Type** - will only display requests submitted within a particular work request type.
- **People - Work Team** – will only display requests assigned to a particular contractor
- **Request Status** - will only display requests that are in a particular status.
- **Date range** – will only display requests submitted within a determined period of time.

Once filters have been set as required, select the **Apply** button:
The page will refresh, and the results displayed:
**Note**, the results are grouped by **Status** as a default view.

The intention here is to review the requests that are pending Approval. These requests can be identified by the fact that they are in the **Requested** group of requests.

It is the responsibility of the **Supervisor** role (Tech FM or equivalent) in COS to review requests that are in the **Requested** status and either:

- **Cancel Work Request**
- **Reject**
- **Approve and Dispatch**

**Approve and Dispatch** – In most cases, the work request will be reviewed, assessed to be valid, and assigned to a contractor so that they can provide an estimate/schedule for the works involved. In this case, the request will be actioned via the **Approve and Dispatch** function.

**Rejected** – In a small number of cases, a Work Request may not be deemed valid, in this case the request will be Rejected.

Note that the Requestor can update the Work Request with additional information and re-submit for approval.

**Cancelled** – Cancelled shouldn’t be used in the instance.

There is only one action possible against a request sitting in the Requested queue, and that is to select the **Approve** button.

**Note**: Where an icon is marked with a red star (★), it is a mandatory function that must be completed before that particular work request is able to continue through the workflow.

**Note**: Where an icon is marked with a blue dot (🔵), it shows that a mandatory action has been completed and that the request can be progressed.
Click into a request requiring Approval under the Requested section, by selecting the Approve (✓) icon:

Key details required when Approving a Work Request:

<table>
<thead>
<tr>
<th>Field</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Work Request Type</td>
<td>Reactive – Normal maintenance request. Corrective – A result of scheduled maintenance. User Funded – Outside of maintenance agreement and must be paid for by the faculty/school. Preventive – Planned Preventive Maintenance.</td>
</tr>
<tr>
<td>Work Team Code</td>
<td>Used to assign the work to the correct contractor. Each contractor is assigned a Work Team Code that will be aligned to their company.</td>
</tr>
<tr>
<td>Purchase Order Code</td>
<td>Must select a purchase order code. This is a restrictive field. Only POs will display that are linked to the selected Work Team Code.</td>
</tr>
<tr>
<td>Cost Type</td>
<td>The option selected will vary by problem type.</td>
</tr>
<tr>
<td>Account Code</td>
<td>If user funded, then an account code must be provided otherwise costs cannot be recovered.</td>
</tr>
<tr>
<td>Safety</td>
<td>Yes/No, flag to indicate whether any specific high-risk activities are involved. If so, appropriately qualified/trained tradespersons must be used.</td>
</tr>
<tr>
<td>Work Description</td>
<td>Field displaying the description as provided by the requestor.</td>
</tr>
<tr>
<td>Customer Notes History</td>
<td>Free text field where Requestor can provide additional instructions to COS.</td>
</tr>
<tr>
<td>Work Notes History</td>
<td>Free text field where COS can provide additional instructions which is also visible to the Requestor.</td>
</tr>
</tbody>
</table>
Review and adjust priority level as required.

The page will refresh, and the actioned request will now display in the Approved status group:
There are 3 actions that can occur for this request:

**Estimate** – Next Mandatory action (=[3] ) must be performed by the contractor

**Schedule** – Can be actioned by the contractor after the estimation has been completed

**Assign to Work Order** – Is the responsibility of the COS Scheduler. Can only be performed once the Estimation and Scheduling steps have been completed.

---

**Attention**

The status of an icon in the Actions field are designated by a dot or star:

- **Blue dot** - has been populated with data and the request can be progressed
- **Grey dot** - has components awaiting action
- **Red star** - has pending additional information that must be completed before a work request can be progressed

If an icon does not have a dot or a star, the action is either not mandatory or data is optional.

Estimating and Scheduling are not mandatory for all Work Requests. This will depend on the SLA for problem types. Refer to Section 13 – On Demand SLAs for details on what rules apply in what circumstances.

---

**Take Note**

**Re-Route**

Re-Routing is a feature that allows for the updating of the Problem Type without having to go through the Approval process. This is useful if the Problem Type has been incorrectly selected and the Work Request should be managed by another team.
Make the required changes, ensuring that a comment is added into the Work Notes section explaining the change, and then select the Re-Route button to enforce those changes:

**Save**
Save is a feature that allows for the updating of certain information in the Work Request without having to go through the Approval process. This applies to:

1. Updating the Priority, or
2. Updating the Location

If any of these values need to be updated, make the required changes, ensuring that a comment is added into the Work Notes section explaining the change, and then select the Save button to enforce those changes:

---

**Suggestion**

- **Maintenance Report Builder:**
The Maintenance Report Builder is a module that allows you to build and generate dynamic reports in a graphical format.

Navigate to the Maintenance Report Builder frame:
Select from the **Shows Chart as** fields to define your report. Then, click **Show** button:

Option: To further filter your report data, click the **More** or **Less** button. Select filters and click the **Show** button:
6. Approved

6.1. Contractor - Add Estimate to a Work Request

Objective
Add estimated costs to a Work Request

Role
Contractor Supervisor

Overview
This is an opportunity for the contractor to estimate cost including:
- Labour (time per role)
- Materials
- Parts
- Other costs

Next Step
Estimated costs will be reviewed by a COS Supervisor.

After a Work Request is Approved and Dispatched by a COS Supervisor, the following occurs:

- The status is changed from Requested to Approved
- The Request is now available for a contractor to add Estimates.

This section focuses on the contractor’s responsibility of adding an estimate.

Note: The request is not yet in the Issued and in Process Status, so Contractors cannot proceed with carrying out the work. There are 2 preliminary steps that must be completed by the contractor (Estimate and Schedule) and then approved by COS before a request is Assigned to a Work Order and then Issued.
Navigate to the Maintenance Console frame:

Use the available filters to restrict the data displayed, or select Filters to display all results:

Work Requests in the Approved section require action.

The first step is to enter an estimate against any requests where the Estimate icon is marked with a blue dot (🔵):

Select the Estimate icon:

When completing the Estimate step, you add:
- the trades you will need for the work, and the estimated hours.
- costs other than labour or parts, such as transportation or administrative costs. You can add these costs by type to better track them.
- the parts needed for the work, and how many
Estimation and scheduling steps are always available for contractors who have the supervisor role for any approved work request before it is issued. The estimation step is required only if the SLA for the work request defines it to be.

When working from the Maintenance Console, required steps have a red star to indicate they are required. When the estimation is required, the Issue button is not enabled until the estimation and any other required steps are done.

**Returned estimates**
If an estimate that you submit requires approval, and the approver rejects the estimate, it will show up in your queue, so that you can enter a new estimate. As the estimator, you can make changes or add information based on the approver’s comments.

Note that the schedule may also need to be updated depending on the changes made to the estimate. See the Scheduling section of this document for more information.

You will note from the below capture, that it is not until a work request is in the Issued and In Process status that you have the ability to update and manage the request via the various action buttons:

- Hold
- Stop
- Update
- Complete

Do not commence any work until you see the request in the **Issued and in Process** status.

Within the **Approved** and **Assigned to Work Order** statuses, the only actions available are to add estimates and schedules. Do NOT proceed with work for any requests that are in these statuses:

Once your estimates and scheduling has been approved, the Work Request will be moved into the **Issued and in Process** status. Once in this status you are able to proceed with the activity.
Attention

Note: Not all Work Requests require either an Estimate or a Schedule.

The status of an icon are designated by a dot or star:

- Blue dot - has been populated with data and the request can be progressed
- Grey dot - has components awaiting action
- Red star - has pending additional information that must be completed before a work request can be progressed

If an icon does not have a dot or a star, the action is either not mandatory or data is optional.

For more information about when Estimates and Scheduling are required, please refer to Section 13 – On Demand SLAs in this document.

6.2. COS - Review Estimate

Objective

Review estimated costs.

Role

COS Supervisor.

Overview

It is the COS Supervisor’s responsibility to ensure that the estimated costs provided by the contractor are reasonable and in line with the requirements stated in the Work Request.

Contractor Schedules Work.

Where a contractor has added an estimate to a Work Request, it is the COS Supervisor’s responsibility to review that estimate and either accept or decline that estimate. This activity is facilitated through the Approve Estimate feature.

Note, a contractor cannot proceed with commencing the physical works relating to a Work Request until the following has occurred:

- Estimate has been approved
• Schedule has been approved
• Work Request has been Issued (Status changed to Issued and in Process)

Navigate to the Maintenance Console frame:

Given that work requests requiring Estimate Approval are only going to be in an Approved Status, a suggestion is to select only the Approved status from the available filters.

Select the Filter button, then select Approved in the Request Status filter. You may also select the Date Range filter to further surface required results. Once filters have been set as required, select the Apply button:
Review any Work Requests that have a pending **Approve** task icon:

Commence the approval activity by selecting the **Approve** icon:

From the resulting pop-up pane, make a selection to either **Approve** or **Reject** the Estimate. Add **Comments** and select the **Return To** option (if rejecting) as applicable:

Once actioned, the Work Request will be updated accordingly.

Repeated estimates will display in the Contractor’s Approved screen marked with a red star(★) indicating that an action is still required for the estimate step icon.

Approved estimates will display in the Approved Screen, there will be a blue dot (🔵), against the estimate step icon denoting that the estimate has been approved. If there is no
requirement to undertake a review of Schedule for the Work Request, then you may proceed with Assigning the Work Request. Refer to the Assign section in this document.

### 6.3. Contractor - Schedule

#### Objective

Schedule resources.

#### Role

Contractor Supervisor.

#### Overview

This is an opportunity for the contractor to schedule specific personnel (craftspersons) for specific dates/times.

COS Scheduler reviews the proposed scheduling.

After the estimate has been added to a Work Request and subsequently Approved by a COS Supervisor, the following must occur:

- The Contractor Supervisor must add a Schedule.
- Schedules will be reviewed by the COS Scheduler. If accepted, the request will be issued to the contractor and works can commence.

This section focuses on the contractor’s responsibility of adding a Schedule.

**Note:** The request is not yet in the Issued and in Process Status, so Contractors cannot proceed with carrying out the work. There are 2 preliminary steps that must be completed by the contractor (Estimate and Schedule) and then approved by COS before a request is Assigned to a Work Order and then Issued.

#### Process

Navigate to the Maintenance Console frame:
Use the available filters to restrict the data displayed, or select Filter to display all results:

Work Requests in the Approved section require action.

The first step is to enter a Schedule against any request where the Schedule icon is marked with a red star (★):

Select the Schedule Button:

Select the Assign Craftsperson option:
When you Schedule, you add:

- The actual **craftsperson(s)** that you want to attend site for this particular task
- The **date(s)** that they will be onsite
- The **time** that they should start
- The **duration** of time to be spent on site.

Then click the **Save** button. You now see the estimation, which is done based on the trade role alongside the actual craftsperson assigned to the task by means of Scheduling.

Click the **Complete Scheduling** button:
6.4. COS – Review Schedule

Review the scheduling proposed by the Contractor.

Objective

Role

Overview

The COS Scheduler will review the scheduling proposed by the Contractor, ensuring that resources aren’t over committed and that there is no conflict with other Work Requests (PPM and On-Demand).

Next Step

Contractor proceeds with completing the Work Request.

Where a contractor has added an estimate to a Work Request, it is the COS Supervisor’s responsibility to review that estimate and either accept or decline that estimate. This activity is facilitated through the Approve Estimate feature.

Note, a contractor cannot proceed with commencing the physical works relating to a Work Request until the following has occurred:

- Estimate has been approved
- Schedule has been approved
- Work Request has been issued (Status changed to Issued and in Process)

Navigate to the Maintenance Console frame:
Use the available filters to restrict the data displayed, or select **Filter** to display all results:

Given that work requests requiring Schedule Approval are only going to be in an Approved Status, a suggestion is to select only the **Approved** status from the available filters.

Select the **Filter** button, then select **Approved** in the **Request Status** filter. You may also select the **Date Range** filter to further surface required results. Once filters have been set as required, select the **Apply** button:
Review any Work Requests that have a pending Approve task:

Commence the approval activity by selecting the Approve icon:

From the resulting pop-up pane, make a selection to either Approve or Reject the Schedule. Add Comments and select the Return To option (if rejecting) as applicable:
7. Assign

7.1. COS Assign a Work Request to a Work Order

**Objective**
Assign Work Requests to a contractor

**Role**
COS Supervisor/COS Scheduler

**Overview**
The COS Supervisor or COS Scheduler can either assign a Work Request to an existing Work Order and then assign it to the contractor. Or, they can assign it to a new Work Order and issue it immediately to the contractor.

Contractor can commence the activity as detailed in the Work Request.

**Take Note**
Both scenarios apply in different circumstances:

1. Where a contractor has added an estimate and a schedule to a Work Request, and both have been approved, it is the COS Supervisor’s responsibility to assign that Work Request to a Work Order. This activity is facilitated through the Approved pane.

2. Where an estimate and a schedule are not required, the Work Request can be Assigned straight away, also through the Approved pane.

**Note**, a contractor cannot proceed with commencing the physical works relating to a Work Request until the following has occurred:

- Estimate has been approved (if required)
- Schedule has been approved (if required)
- Work Request has been Issued (Status changed to Issued and in Process)

**Process**

Navigate to the Maintenance Console frame:
Use the available filters to restrict the data displayed, or select Filter to display all results:

Given that work requests requiring assignment to a Work Order are only going to be in an Approved Status, a suggestion is to select only the Approved status from the available filters.

Select the Filter button, then select Approved in the Request Status filter. You may also select the Date Range filter to further surface required results. Once filters have been set as required, select the Apply button:
Review any Work Requests that have a pending Assign to Work Order task:

The Assign to Work Order step button will only be available if both the Estimate and Schedule steps have been Approved.

In this situation, only the Estimate has been approved (note the blue dot), so the Assign to Work Order icon is disabled:

In this situation, both the Estimate and Schedule have blue dots, so the Assign to Work Order icon is available for selection:

To proceed, select the Assign to Work Order icon:

You have 3 options for assigning the Work Request:

- Assign to Existing Work Order
- Assign to New Work Order
- Assign and Issue Work Order (Preferred Option)

What is a Work Order?

A work Order is a grouping of Work Requests. It can be convenient to group Work Requests into a new, or existing, Work Order prior to Issuing the Work Request.

Assign to Existing Work Order

Using this option will require an additional step to Issue the WR from within the Assigned to Work Order pane.
From the dialogue box that opens, select the **Assign to Existing Work Order** tab:

![Assign to Existing Work Order](image)

Use the filters at the top of the dialogue box to locate the required Work Order and then click on the **Assign** link:

![Assign Work Request 6770183](image)

On completion of this activity, the page will refresh and this Work Request will no longer be visible in the Approved status category. It has been updated and is now in the **Assigned to Work Order** Status:

(You will see that the next step is to **Issue** the Work Request)

![Assigned to Work Order](image)

**Assign to New Work Order**

Using this option will also require an additional step to Issue the WR from within the **Assigned to Work Order** pane.

From the dialogue box that opens, select the **Assign to Existing Work Order** tab:

![Assign to Existing Work Order](image)
Enter a description into the **Description** field and then click on the **Assign** button:

![Assign Work Request 6770183](image)

On completion of this activity, the page will refresh, and this Work Request will no longer be visible in the Approved status category. It has been updated and is now in the **Assigned to Work Order Status**:

(You will see that the next step is to **Issue** the Work Request)

![Assigned to Work Order](image)

**Assign and Issue Work Order (Preferred Option)**

This is the most streamlined of the 3 processes as it also Issues the Work Request to the contractor. This step negates the additional step of having to Issue the Work Request from within the Assigned to Work Order pane.

From the dialogue box that opens, select the **Assign and Issue Work Order** tab:

![Assign Work Request 6770183](image)

Enter a description into the **Description** field and then click on the **Assign and Issue** button:
Note that if entering any values into the other fields, ensure that you select values that are consistent with the Work Request.

On completion of this activity, the page will refresh and this Work Request will no longer be visible in the Approved status category. It has been updated and is now in the Issued and in Process Status:
(It is now the contractor’s responsibility to manage.)

Assigning Multiples:

It’s possible to action multiple Work Requests at the same time. To do so, select one or more check boxes from within the same status grouping:

Once any more than 1 checkbox is selected, a list of available activities will be displayed at the top of the frame:
**Note:** If the items elected have no common activities, then no actions will be displayed, only a notification of the number of selected items. There is also a Cancel Selection button as an option to cancel selected items.

Select the **Assign** Button for the multiple selections:

If one or more selected items fail to meet the required criteria, you will receive this notification:

If all selected items meet the required criteria, the dialogue box will be displayed and you can proceed as per the previously identified actions:

- Assign to Existing Work Order
- Assign to New Work Order
- Assign and Issue Work Order
8. Issue

8.1. COS Issue a Work Order to a Contractor

**Objective**
Issue a Work Order

**Role**
COS Scheduler / COS Supervisor for P1/P2

**Overview**
The COS Scheduler will Issue any Work Requests that meet the required state. Typically, this is a result of the scheduling meeting COS’ requirement.

Work Request moves to the Issued and in Process pane.
Contractor may proceed with completing the activity as detailed in the Work Request.

This action results in the Work Request moving from the **Assigned to Work Order** status, to the **Issued and in Process** status.

The result of this change is that the contractor now has permission to begin work on this task. The Work Request is now their responsibility to manage through to its completion.

**Take Note**

As a general rule, this process only applies to PPM Requests. As a result of the PM schedules being generated, PPM requests become available in the **Maintenance Console** in the **Assigned to Work Order** pane. This is the contractor’s opportunity to provide schedules to each Work Request. The COS Scheduler can then review the provided schedules and action accordingly.

**Suggestion**

When completing the Assign step for On Demand Work Requests, selecting the Assign and Issue Work Order option will move those Work Request directly into the Issued and in Process status. The advantage with this methodology is that it will keep the On-Demand Work Requests separate to the PPM requests (from a COS schedule review perspective).
Navigate to the Maintenance Console frame:

![Maintenance Console]

Use the available filters to restrict the data displayed, or select **Filter** to display all results:

![Maintenance Console Filter]

Given that work requests requiring **Issuing** are only going to be in the **Assigned to Work Order** Status, a suggestion is to select only the **Assigned to Work Order** status from the available filters.

Select the **Filter** button, then select **Assigned to Work Order** in the **Request Status** filter. Once filters have been set as required, select the **Apply** button:
Review any Work Requests that have a pending **Issue** task:

You will be asked to confirm this action:

If there are any settings that preclude the Work Request from being Issued, you will be notified with an error message:

On successfully Issuing the Work Request, the page will refresh and the request will now only be visible under the Issued and in Process status.

It is now the contractor’s responsibility to manage:
Note: The Issuing of requests is a step that must be completed for ALL requests, both Preventative Maintenance and On Demand.

Refer to the Managing PPM documentation for guidance on the establishment and management of PM Procedures, Schedules and Work Orders. However, this step aligns with the Issuing of On Demand Work Orders. You see both PM and On Demand requests in the same Assigned to Work Order frame. Separate these requests by using the filter tools as required.

Issuing Multiples:

Note: Due to the large volume of PM Work Requests, utilising the Issue multiple feature in Archibus is an efficient method of getting the requests out to the required contractors.

It is possible to action multiple Work Requests at the same time. To do so, select one or more check boxes from within the same status grouping:

Once any more than 1 checkbox is selected, a list of available activities will be displayed at the top of the frame:

Note: If the items selected have no common activities, then no actions will be displayed, only a notification of the number of selected items.
**Note:** If the items elected have no common activities, then no actions will be displayed, only a notification of the number of selected items. There is also a Cancel Selection button as an option to cancel selected items.

Select the **Issue** Button for the multiple selections:

You will be asked to confirm the action:

If there are any setting that preclude the Work Request(s) from being Issued, you will be notified with an error message:

On successfully Issuing the Work Request(s), the page will refresh and the request(s) will now only be visible under the **Issued and in Process** status.

They are now the contractor's responsibility to manage:
9. Issued and in Process

9.1. Contractor – Manage your Work Requests

**Objective**
Locate your Work Requests

**Role**
Contractor Supervisor

**Overview**
Understanding of where to locate Work Requests within Archibus and what actions you are responsible for.

**Next Step**
Manage your Work Requests through to completion and preparation for payment of services provided.

---

**Take Note**

As a Contractor, whatever Work Requests that you see in the *Issued and in Process* status are yours to manage. COS will not interact with requests in this status.

Your key objective is to be aware of what Work Requests have been issued to you, know when they are due for completion, and assign appropriate resources to ensure that the activity can be completed prior to the nominated Due Date.

Contractor actions to Work Requests in this status include:

- Add details to the WR such as
  - Craftsperson’s hours (actual costs)
  - Parts (actual costs)
  - Other costs (actual costs)
  - Comments or information
  - Supporting documentation

- Change the status of a Work Request to (as required):
  - On Hold for Access
  - On Hold for Labour
  - On Hold for Parts
  - Completed

- When all is done, Flag the WR as Ready for Review of Payment.
• Resolve any WR issues in these scenarios:
  o A WR is not Verified by COS
  o A WR has not been approved for payment by COS

This process is demonstrating how to view Work Requests currently in Issued and in Process status.

Navigate to the Maintenance Console frame:

Use the available filters to restrict the data displayed, or select Filter to display all results:

Given that work requests under your control are only going to be in the Issued and in Process status, select only the Issued status from the available filters.

Once filters have been set as required, select the Apply button:
Work Requests in the **Issued** and **in Process** status will be displayed:

Each Work Request has actions that can be performed:
- **Hold** – To pause the WR
- **Stop** – Not utilised
- **Update** – To add details or information to the Work Request
- **Complete** – To change the status of the WR to Completed

Selecting multiple requests will enable any actions that apply to all of the selected Work Requests:
To review the details of a Work Request, select the **Work Request** number:

A pop-up pane will open and will display all information relating to that particular Work Request:

Review the available information by expanding and collapsing each section. Select **Cancel** or **Save** to continue.

**Location, Problem and Request Details** – Contains the details of the Work Request:
Work Request History – Contains the details of who has updated the Work Request at each update:

Cost Categories – Sections where costs can be added to the Work Request which will have an impact on the Actual Costs, and therefore potentially an impact on the billable costs:
Trades – Assign trades roles to the Work Request. Trades roles are generic and cost are calculated from the background hourly rate and the amount of time assigned to the Work Request.

Craftsperson Assignments – Assigning a craftsperson is assigning an actual human role to the Work Request. Rates may vary from one human to another based on their categorisation (Leading Hand, Supervisor, Apprentice etc.)

Parts – Parts and corresponding costs can be loaded into the system. When assigned to a Work Request, costs are calculated from the background unit rate and added to the Actual Costs.

Other Costs – Used for the assignment of any miscellaneous costs that cannot be captured in any of the above fields.

Estimated Costs – Are set from either of these interactions:
1. For PPM Requests – From the background data associated with the relevant procedure, and/or the scheduling information provided by the contractor prior to the Work Request being Issued.
2. For On Demand Requests – From the Estimated information provided by the contractor prior to the Work Request being Issued.

Actual Costs – Derived from the information provided by the contractor and/or craftspersons during the undertaking of the Work Request.

Chargeable Costs – What will actually be paid to the contractor by COS. Depending on the Cost Type established at the inception of the Work Request, the Chargeable Costs will either be reflective of the Estimated Costs, or the Actual Costs.

<table>
<thead>
<tr>
<th>Field</th>
<th>Costs</th>
</tr>
</thead>
<tbody>
<tr>
<td>Estimated Costs</td>
<td>Actual Costs</td>
</tr>
<tr>
<td>Estimated Cost of Labour</td>
<td>0.00</td>
</tr>
<tr>
<td>Estimated Cost of Parts</td>
<td>0.00</td>
</tr>
<tr>
<td>Estimated Cost of Tools</td>
<td>0.00</td>
</tr>
<tr>
<td>Estimated Other Costs</td>
<td>0.00</td>
</tr>
<tr>
<td>Estimated Total Cost</td>
<td>0.00</td>
</tr>
</tbody>
</table>

Comments can be added into the New Work Notes field under the Location, Problem and Request Details section. Work Notes are not customer facing and are only visible between COS and the Contractor.

Click the Save button to lock in any changes made to the Work Request.
Action – On Hold

This action puts a request on hold while waiting for parts, the appropriate trade, or security access. You can stop or complete a request that is on hold.

- Reason for Hold
  - Hold for Parts
  - Hold for Labor
  - Hold for Access
  - Hold for Quote

- Revised Due Date
- Revised Due Time
- Work Notes

Action – Stop
Do Not Use, Work Requests that are Stopped cannot be re-commenced.

Action – Update
To locate work requests on a map, use the Filters and add the Work Team under the General section, and select Site field under Location & Organisation section. Then, click the Apply button.
Then, click on the **Location** button to bring up a grouping of where work requests are. You can view the **Floor Plan** and zoom in to a particular room or venue:

You can also select the **Map** tab to view a geographical location of work requests. Select a location and click the **Filter in Console** link to show work requests in that particular location:
To find the location of a single work request, open a work request and click on the Map button in the Location, Problem and Request Details section.

9.2. Contractor – Assign Craftspersons

**Objective**
Assign craftsperson(s) to a Work Request to achieve:
- Scheduling of resources
- Mechanism so that the craftsperson can access the WR in the Mobility App

**Role**
This function is performed by the Contractor Supervisor Role.

**Overview**
- Find the Work Request that needs updating
- Assign required craftspersons
- Update

Craftsperson can attend site as scheduled and can commence work. Where the craftsperson has access to the Mobility App, they can independently update the WR with the time spent on site and can update the status of the Work Request.
Contractors can assign Work Requests to specific Craftspersons so that the assigned craftsperson can view the WR in either the Mobile client application, or the web client application.

Depending on the nature of the specific request, this activity can either be completed as part of the scheduling activity that occurs when the Work Request is in the Approved status, or it can occur at this stage once the Work Request has been issued.

Navigate to the Maintenance Console frame:

Filter by Request status, Issued, and click the Apply button:

Select the required Work Request:
A pop-up pane will open, go to the **Craftsperson** section:

**Option 1 – Craftsperson assignment:**

Craftsperson assignment refers to the scheduling data. Add a new Craftsperson by clicking the **Assign** button.

**Craftsperson Code** – A mandatory field, select from the available list

**Estimated Hours** – Optional field, calculates an estimated cost based on the hourly rates loaded in Archibus for that individual person

**Work Type** – Optional field, activity of the craftsperson

**Assignment Status** – Optional field, Active as default selection
Once a craftsperson is assigned, Work Logs is automatically created for the assignment. The Work Logs will reflect how many **actual hours** the craftsperson worked on the Work Request.

**Option 2** – Edit an existing Craftsperson assignment by selecting an existing craftsperson code (if applicable):

- **Craftsperson Code** – A mandatory field, select from the available list
- **Date Tradesperson Assigned** – The date a tradesperson is scheduled to go on site
- **Time Tradesperson Assigned** – The time a tradesperson is scheduled to start on site
- **Estimated Hours** – Optional field, calculates an estimated cost based on the hourly rates loaded in Archibus for that individual person
The optional fields aren’t mandatory, and at this stage it is useful only to assign a craftsperson to the Work Request. However, before the Work Request is completed, the Actual Hours must be completed as it is used to calculate Actual Costs in the system. A $0 value recorded in Actual Costs may result in no payment for this Work Request.

There are other situations where you might assign a craftsperson and record actual hours and date/time on site all in one step.

On Site Hours is calculated from Date/Time started and Date/Time finished. This value will be highlighted if the sum of Actual Hours + Double Time Hours + Overtime Hours doesn’t equal the same value.

9.3. Contractor – On Hold Status

Objective

Change the status of a Work Request to one of the On-Hold statuses.

Role

This function is performed by the Contractor Supervisor Role.

Overview

• Find the Work Request that needs updating
• Select the required Status
• Provide a reason for the change

Next Step

All requests that have been changed to On-Hold for any reason must be reviewed by a COS Supervisor for their approval.

If for any reason a Work Request cannot be completed prior to the expected Date to Perform, the contractor can put that Work Request into an On-Hold status. Options for On Hold include:

• On Hold for Parts – Can be used when there is a delay in sourcing parts
• On Hold for Labour – Can be used when there is insufficient labour available
• On Hold for Access – Can be used when there are delays in gaining access to the affected area.

Once a Work Request has been changed to an On-Hold status, 2 things will occur:
1. COS Supervisor will review the reasoning behind the status and will flag the change as either:
   a. COS Approved
   b. Not COS Approved
2. COS Scheduler will set a Revised Due Date

As a contractor, you must work towards the completion of the WR within the new timeframe as determined in conjunction with the COS Scheduler.

Attention

Where the COS Supervisor determines that the On-Hold status is Not COS Approved, there may be KPI penalties imposed. It is important that you, the contractor, understands in what situation COS will accept a Work Request being put into an On-Hold status.

Process

Navigate to the Maintenance Console frame:

![Maintenance Console]

Use the available filters to restrict the data displayed, or select Filter to display all results:

![Maintenance Console Filter]

Given that work requests under your control are only going to be in the Issued and in Process status, select only the Issued status from the available filters.
Once filters have been set as required, select the **Apply** button:

Review any Work Requests that are in the **Issued and in Process** pane that may need to be put on hold.

Select multiple or individual Work Requests as required:

From the **Hold** pop-up pane, select the most applicable category, provide comments when prompted, and select **Yes**:

Enter the reason for putting the Work Request On-Hold in the Work Notes section of the Work Request.
The Maintenance Console will refresh, and the selected requests will now display in one of the On-Hold statuses:

If you don’t see the Reschedule Status or the Revised Due Date, modify your view to include these fields by clicking the Options button. Then, select the fields to show and click the Update button:

**Reschedule Status:**
Reschedule Required is the default status when the Work Request is put On Hold.

A COS Supervisor will review the request and will update the status to either:
COS Approved
Not COS Approved

**Revised Due Date:**
After the COS Supervisor has done their initial review and set the Reschedule Status, the COS Scheduler will review and provide a Revised Due Date. This is the new date for the Work Request to be completed by. As part of the Scheduler’s process, they will also put the Work Request back into Issued and in Process status.
9.4. COS – Review On Hold

Objective

Review and action Work Requests that are On Hold

Role

COS Supervisor and COS Scheduler

Overview

COS Supervisor – Set a new Reschedule Status
COS Scheduler – Set a Revised Due Date

Next Step

Contractor can proceed with the Work Request

There are 2 parts to this process, one performed by the COS Supervisor, the other by the COS Scheduler.

1. COS Supervisor
   Review the request and set a new Reschedule Status to either:
   - COS Approved – OK to be on hold, no penalty incurred
   - Not COS Approved – Not OK to be on hold, may be KPI related penalties imposed.

2. COS Scheduler
   Set a revised Due Date and move the Work Request back into the Issued and in Process status.
Attention

The COS Scheduler must perform their action before the COS Supervisor performs their actions.

Suggestion

Modify your view so that you can see both fields:
- Reschedule Status
- Revised Due Date

This ensures that each role (Supervisor and Scheduler) can see what the other has or hasn’t yet done.

Process

Navigate to the Maintenance Console frame:
Use the available filters to restrict the data displayed, or select **Filter** to display all results:

Given that work requests are only going to be in one of the **On-Hold** statuses, a suggestion is to select only the **On-Hold** status from the available filters.

Once filters have been set as required, select the **Apply** button:

From the resulting page, review any Work Requests that are **On Hold**:
If the Reschedule Status is displaying Reschedule Required, the COS Supervisor hasn’t yet actioned the request.

If the Revised Due Date is empty, the COS Scheduler hasn’t yet actioned the request.

**COS Supervisor**, click into the Work Request to open the Work Request details pane, in the Location, Problem and Request Details section, change the Reschedule Status to one of the available options and then click the Save button:

**COS Scheduler**, click into the Work Request to open the Work Request details pane, in the Location, Problem and Request Details section, Update the following fields: Revised Due Date, select one of the available options, then under Status, select Issued and in Process and then click the Save button:
You will be prompted to provide a comment:

The Work Request has now been reverted to the Issued and in Process Status. It also has a Revised Due Date that the contractor must adhere to.

The contractor is now able to continue managing the Work Request.

9.5. Contractor – Manage un-Verified WRs

Update Work Requests that have failed the verification step.

Contractor Supervisor

Identify why a Work Request has failed the verification step. Resolve the identified issue.
Work Request is updated as required and resubmitted for Verification.

All Work Requests that have been updated to the Completed status must be reviewed and verified by COS. Work Requests that aren’t Verified will be reverted to Issued and in Process status. It’s the contractor’s responsibility to rectify any issues identified through this process. Once resolved, they will update the Work Request and change the status to Completed again. Then COS can conduct the Verification step again.

Work Requests must be verified prior to moving on the Cost Approval step.

Navigate to the Maintenance Console frame:

Use the available filters to restrict the data displayed, or select Filter to display all results:

Given that work requests that have been rejected through the Verification step are only going to be in the Issued and in Process status, a suggestion is to select only the Issued status from the available filters.

Once filters have been set as required, select the Apply button:
To see why a Work Request has failed Verification, click into the Work Request to display the detail pane. It is designated by a red arrow:

From the Work Request History, there is a record of the verification failure. There will be information in the Customer Facing Comments as to why the Work Request was not verified. If more information is required, contact your COS Supervisor.
It is the Contractor’s responsibility to resolve any issues identified by COS through the Verification process. Once resolved, the Work Request should be updated to Completed again so that it may be re-Verified.
10. Completed

10.1. Contractor – Complete WR

Objective
Change the status of a Work Request to Completed.

Role
Contractor Supervisor

Overview
Once an activity has been physically completed, update that Work Request to Completed status.

COS will review the request to assess the quality of the work.
You can continue to update the Work Request with information and actual costs as information becomes available.

Next Step
Work Requests should be updated to Completed status prior to the nominated Date to Perform whenever possible (provided the work has actually been done).

Take Note
It is possible to continue updating a Work Request with actual costs and other supporting information even after the Work Request has been changed to Completed. It is not until the Request is flagged as Yes for Ready for Review of Payment that it is locked down and no further information can be added.

Process
Navigate to the Maintenance Console frame:
Use the available filters to restrict the data displayed, or select Filter to display all results:

Given that work requests requiring completion are only going to be in the Issued and in Process status, a suggestion is to select only the Issued status from the available filters.

Alternatively, you can search for a specific Work Request by entering the Work Request number into the Work Request Code field.

Once filters have been set as required, select the Apply button:
Either select multiple, or individual Work Requests and then select the Complete step button:

Prior to the status change to Completed being affected, you will be prompted to confirm the action:

The Maintenance Console will refresh. The Work Requests will now display in the Completed frame:

You will note that as the Work Request is displaying No under the Ready for Review of Payment field, it is still possible to Update the Work Request.

10.2. Contractor – Update WR with Actual Costs
Objective

Add actual costs and other supporting information to a Work Request

Role

Contractor Supervisor

Overview

Using the Update function to add Actual Costs to a Work Request.

Work Request is marked as Ready for Review of Payment so that costs can be assessed for payment approval.

Next Step

Work Requests should be updated with Actual Costs and supporting documentation as that information becomes available.

This activity can be carried out by:

- The Contractor Supervisor in the office once site information has been provided by the personnel working on site
- Or, by the tradespersons onsite through the Mobility Application on their smartphone (see the Mobility App section in the document).

Take Note

It is possible to continue updating a Work Request with actual costs and other supporting information even after the Work Request has been changed to Completed. It is not until the Request is flagged as Yes for Ready for Review of Payment that it is locked down and no further information can be added.

Process

Navigate to the Maintenance Console frame:
Use the available filters to restrict the data displayed, or select **Filter** to display all results:

Given that work requests requiring Updating are going to be in either the **Issued** and **in Process** status or the **Completed** status, a suggestion is to select both the **Issued** and **Completed** statuses from the available filters.

Alternatively, you can search for a specific Work Request by entering the Work Request number into the **Work Request Code** field.

Once filters have been set as required, select the **Apply** button:
Either select multiple, or individual Work Requests and then select the Update step button:

Select an Individual Request

Add costs into the relevant category:

Craftsperson Assignments – For use when assigning time worked by actual individuals. This will calculate actual costs based on their schedule of rates loaded into the system background data.

Edit an existing entry by clicking the Craftsperson Code link:
You can add a new Craftsperson by clicking the **Assign** button:

**Parts** – For use when assigning parts used. This will calculate actual costs based on the information loaded into the system background data.

Either add a new line, or edit an existing entry:

**Other Costs** – For use when assigning materials used. This will calculate actual costs based on the information provided.

Either add a new line, or edit an existing entry:
Supporting Documentation – In the Documents and Activity tab, upload attachments and supporting actual costs, particularly supplier invoices for materials used. Then click the Save button to lock in all changes:

The Maintenance Console will refresh and the Work Request will continue to display in the previous status (either Issued and in Process or Completed).

Select multiple Requests

Attention

When using the Update Multiple feature, functionality is limited. You cannot see information specific to a Work Request. You cannot review existing costs. You are only able to add the same information to all of the Work Requests selected.

For this reason, the Update Multiple feature is only suitable for use in limited circumstances.

Add costs into the relevant category:

Craftspersons – For use when assigning time worked by actual individuals. This will calculate actual costs based on their schedule of rates loaded into the system background data.
**Other Costs** – For use when assigning materials used. This will calculate actual costs based on the information provided.

Mark a Work Request as **Ready for Review of Payment**

Contractor Supervisor

This step is the contractor acknowledging that the activity has been completed and that they are ready to be paid. The Work Request is locked down and no further information can be provided from this point onwards.
Cost Approval is conducted by COS

This is the final step in the process of managing a Work Request.

By changing the **Ready for Review of Payment** flag to **Yes**, you are acknowledging that:

- The Work Request is Completed
- All Actual Costs have been assigned
- All additional information has been provided
- No further action is required

From this point onwards, you have no opportunity to modify any aspects of the Work Request.

**Navigate to the Maintenance Console frame:**

Use the available filters to restrict the data displayed, or select **Filter** to display all results:

Generally, work requests requiring the update to **Yes** for **Ready for Review of Payment** are going to be in the Completed status, a suggestion is to select only the **Completed** status from the available filters.
Alternatively, you can search for a specific Work Request by entering the Work Request number into the **Work Request Code** field.

Once filters have been set as required, select the **Apply** button:

Add the **Ready for Review of Payment** to your list of visible fields:

Any Work Requests in the **Completed** status that have **No** in the **Ready for Review of Payment** field still require some action on the contractor’s part.

Click on the **Update** step button to proceed:

In the **Location, Problem and Request Details** section, change to **Ready for Review of Payment** value to **Yes** and then click the **Save** button:
Once the Maintenance Console refreshes, you will see that the Work Request has been updated. It now displays with a Yes value in the **Ready for Review of Payment** field and there are no longer any action buttons. The Work Request has been locked down, no further changes are possible:

If a Work Request fails the Verify step (which can occur anytime after being Completed), the Work Request will be reverted to Issued and in Process.

If a Work Request fails the Cost Review step, it will stay in Completed status. However, the **Ready for Review of Payment** will be set back to No and the Invoice Approval status will be set to Disputed by COS. In this scenario, it is possible for the Work Request to be updated.

More information is available in the **Contractor – Dispute Resolution** section of this document.

### 10.4. COS Supervisor – Verify Completed WR

**Verify Work Requests that have been completed**
Work Requests that have been completed must be verified by an appropriate person within COS. This function is primarily to acknowledge that the Work Request has been completed to a satisfactory standard.

Cost Approvals by financial delegate so that Invoice Certificates can be generated.

**Navigate to the Maintenance Console frame:**

Given that work requests are only going to be in the Completed status, a suggestion is to select only the **Completed** status from the available filters.

Once filters have been set as required, select the **Apply** button:
From the resulting page, review any Work Requests that are **Completed** and have an active **Verify** step icon:

Either select multiple, or individual Work Requests and then select the **Verify** step button:

You will be prompted to provide a comment and either **Confirm** that the Work Request has been completed to a satisfactory standard, or **Return Incomplete** if it is not an acceptable standard:

**Confirmed** – Stays in **Completed** status. The contractor may continue to add costs and information until such time as they are ready to flag the Work Request as **Yes** for **Ready for Review of Payment**.

**Return Incomplete** – Moves back to the **Issued and in Process** status where the contractor can rectify any issues that are provided through the comments field.
There are specific rules for some service lines that the verification should not occur until after the Work Request has been changed to **Completed** status and marked as **Ready for Payment**. This is to ensure that contractors are unable to continue adding costs to the Work Request after it has been Verified.

### 10.5. Verification Exceptions

#### Security

All Work Requests must be **Ready for Review of Payment** = **Yes** prior to being Verified. Security Supervisors are not only verifying the work request, but are also checking and approving the actual costs of each Work Request. It is important that only Work Requests that are flagged as **yes, Ready for Review of Payment** as this prevents the contractor from adding any further actual costs or any other information to the Work Request.

#### Soft Serv.

Not necessary to be **Ready for Review of Payment** prior to Verification step. Costs will be reviewed independently as part of the Cost Approval process prior to the issuing of Invoice Certificates.

#### Hard Serv.

Not necessary to be **Ready for Review of Payment** prior to Verification step. Costs will be reviewed independently as part of the Cost Approval process prior to the issuing of Invoice Certificates.

So as to ensure that a Work Request is **Yes** for **Ready for Review of Payment** prior to completing the Verification step, ensure that the Ready for Payment field is added to your view in the Maintenance Console:
Only Work Requests that have a Yes value in the Ready for Review of Payment field should be Verified:

10.6. COS Manager – Approve/Dispute Payment

Review Costs recorded against Work Requests and either Approve or Dispute those costs.

COS Financial Delegate

Review all Work Requests that have been marked as Ready for Review of Payment. Action accordingly by either Approving the costs, or disputing the costs.

If Approved, Work Request will be paid.

If disputed, the Contractor must resolve.
Be aware that there are 2 tools available:

- **Cost Approval** – only On-Demand Work Requests are displayed here
- **PM Cost Approval** – Only PM Work Requests are displayed here

Apart from the different data sets being displayed, the functionality of both pages is identical. To avoid duplication, this guide will only provide guidance on one of the above pages, however the principles documented apply to both pages.

**Process**

Navigate to COS Invoice Processing:

Select either **Cost Approval**, or **PM Cost Approval**.

When using the Cost Approval and PM Cost Approval pages, it is **not** recommended to use Mozilla Firefox as this browser can result in display issues.

From the top right menu, select the status of Work Requests that you want to review and action, click on the **Show** button:
There are 4 key invoice statuses that are important in this process:

**Not Processed** – Work Requests that are pending review by COS. A decision is to be made, either:
- Approve, or
- Dispute (must provide comments so that the contractor can rectify)

**Approved** – Work Requests that COS has reviewed and determined to be suitable for payment.

**Disputed by COS** – Requests that COS has reviewed and disputed. The contractor is responsible for resolving the dispute and updating the status to Dispute Resolved.

**Dispute Resolved** – Any Work Requests with this category have been previously disputed by COS and subsequently resolved by the Contractor. Review these requests to determine if they are now OK to be Approved, or whether they need to be Disputed again.

Review the displayed Work Requests in the Not Processed status:

**Note** that selecting **Customise Columns** enable you to add/remove fields and adjust the order in which they display:

Double-clicking on the **Work Request** number will open a pop-up frame that provides all the Cost information for that Work Request:
Key info includes:

- Date Verified
- Who Verified
- Survey Rating/Comments
- Actual Costs (total)
- Breakdown of costs by category (Trades, Craftsperson, Parts, Tools, Other)

Close that frame by clicking on the x icon on the upper right corner of the frame to return to the Cost Approval view.

Scroll to the Invoice Status column.

Select either:
A = Approve
D = Dispute

Disputing will prompt for a reason. Provide as much information as possible so that the Contractor can resolve the issue:
10.7. Contractor – Dispute Resolution

**Objective**
Identify and resolve Work Requests that have been disputed for payment purposes.

**Role**
Contractor Supervisor

**Overview**
Identify any Work Requests that have been disputed as part of the Cost Approval process. Update the Work Requests as required and submit for re-Approval.

**Next Step**
COS will rereview the Work Request for Cost Approval.

After a Work Request has been marked as Ready for Review of Payment. A COS representative will review that request for Cost Approval. They will either:

- **Approve** – Agreeing with the costs, when enables the Work Request to be included on the next scheduled Invoice Certificate.
- **Dispute** – Disagree with the cost of the Work Request in which case the Contractor needs to work with COS to come to an agreed resolution.
Navigate to the Maintenance Console frame:

![Archibus Maintenance Console](image)

Use the available filters to restrict the data displayed, or select **Filter** to display all results:

![Maintenance Console Filter](image)

Given that work requests are only going to be in the Completed status, a suggestion is to select only the **Completed** status from the available filters.

Once filters have been set as required, select the **Apply** button:
From the resulting page, ensure that you have the Invoice Status field displayed:

Sort on this field so that you can easily see any Work Requests that are currently Disputed by COS.
You’ll notice that these requests have an Update action:

Make the required changes to the Work Request (Add more information, attach supporting documentation, adjust actual costs etc.)

Once done, update the following in the Location, Problem and Request Details section:

1. Ready for Review of Payment = Yes
2. Invoice Status = Dispute Resolved
3. Click the Save button to lock in the changes
The Work Request will now be available for the COS Representative to re-review.

10.8. **COS Manager – Review Dispute Resolved WRs**

- **Objective**: Review Work Requests that have previously had costs disputed and subsequently been resolved by the Contractor.
- **Role**: COS Financial Delegate
- **Overview**: Review Work Requests that are in the Dispute Resolved status. These Work Requests have previously been Disputed by COS.
- **Next Step**: If Approved, Work Request will be paid. If disputed again, the Contractor must resolve again.

Be aware that there are 2 tools available:
• **Cost Approval** – Only On-Demand Work Requests are displayed here
• **PM Cost Approval** – Only PM Work Requests are displayed here

Apart from the different data sets being displayed, the functionality of both pages is identical. To avoid duplication, this guide will only provide guidance on one of the above pages, however the principles documented apply to both pages.

**Process**

Navigate to COS Invoice Processing, select either **Cost Approval**, or **PM Cost Approval**.

Review the displayed Work Requests in the **Dispute Resolved** status:

Scroll to the **Dispute Notes** column to determine why the request was previously disputed. Click on [...] :
Double-click into the Work Request to see if the required changes have been made:

If you are satisfied that the Work Request Costs are appropriate, then Approve by selecting the A option in the Invoice Status column.

If you are still not satisfied that the Costs are appropriate, you may re-dispute the request by selecting the D option. Be sure to add further comments for the Contractor.
11. Close

11.1. COS Finance Officer – Generate Invoice Certificates

Objective

Generate Invoice Certificates

Role

COS Finance Officer

Overview

Monthly process of generating and dispatching invoice certificates to Contractors.

Next Step

Contractor Creates Tax Invoice and returns it to COS for Payment

Every month invoice certificates are generated and dispatched via email to contractors so that they can submit a tax invoice to COS for payment. Each invoice certificate is a summary of all work requests that COS has approved for payment and that have not been included on a previous invoice certificate.

Process

Navigate to Generate Goods Receipt:
Select which invoice certificates need to be generated and then select the **Generate PR Import** or **Generate GR Import** buttons.

### 11.2. Contractor – Invoice Certificates/Tax Invoices

**Objective**

Review received Invoice Certificate and create a corresponding Tax Invoice

**Role**

Contractor Finance Role

**Overview**

Review the Invoice Certificate(s) for accuracy. Values against each Work Request are a direct result from inputs provided by the Contractor.
Create a Tax Invoice for the amount displayed on the Invoice Certificate. The amount and PO line number must match the Invoice Certificate for successfully receipting.

Return both documents to COS or directly in Unibuy for processing and payment.

Next Step

Return Tax Invoice and corresponding Invoice Certificate to COS or Unibuy so that the invoice can be paid.

Contractors receive invoice certificates by email as they are generated (monthly).

Invoice Certificates include all Work Requests that have been Pre-Approved for Payment.

To receive payment for the amount stipulated on the Invoice Certificate, Contractors must do the following:

1. Create a Tax Invoice for the amount shown on the Invoice Certificate (1 invoice per certificate).
2. Ensure that the Tax Invoice includes the Invoice Certificate Reference Number.
3. Ensure that the Tax Invoice complies with any other statutory requirements.
4. Return the Tax Invoice and the Invoice Certificate to the nominated COS email address.

Here is a sample Invoice Certificate:
11.3. COS Finance Officer – Process Tax Invoices

**Objective**
Process returned Tax Invoices.

**Role**
COS Finance Officer

**Overview**
Check the returned Tax Invoice against the system and update the Invoice number against the Invoice Certificate in the system.

Tax Invoice is Green Stamped, and Contractor receives payment.

Contractors must return their invoice certificates to COS along with a tax invoice for the amount shown on the invoice certificate (All amounts shown on an invoice certificates are exclusive of GST).
COS must check that the total on the invoice matches the invoice certificate and the amount shown in the system. If there is any discrepancy, the invoice should not be processed.

**Process**
Navigate to Enter Invoice Number against Invoice Certificates:
Identify the required Invoice Certificate from the list. Ensure that the value displayed in Archibus matches that shown on the Contractor’s Tax Invoice. If the values match, enter the Contractor’s Tax Invoice Number into the available field and click on the Save button:

Now the Tax Invoice can be Green Stamped and submitted to Finance for payment.

**Suggestion**

All Tax Invoices should include the Invoice Certificate reference number to assist with aligning the correct Tax Invoice with its corresponding Invoice Certificate.

11.4. **COS Finance Officer – Close WRs**

**Objective**

To close Work Requests
COS Finance Officer

Overview

To close Work Requests that have undergone the invoicing process.

Closed Work Requests will be archived and no longer visible in the Maintenance Console.

Next Step

Process

Navigate to the Maintenance Console frame:

Use the available filters to restrict the data displayed, or select Filter to display all results:

Given that work requests needing to be Closed are only going to be in the Completed status, a suggestion is to select only the Completed status from the available filters.

Once filters have been set as required, select the Apply button:
From the resulting page, ensure that you have the **Goods Receipt Batch ID** and **Invoice/Goods Receipt ID** field displayed:

Any Work Requests that have values in both of these fields can be **Closed**. Please do not manually close a work request unless the work was not performed and supplier is not be paid. The system automatically closes receipted work requests overnight.
Close Work Request 5853418

This action archives the request and prevents any further updates to it.

Close this work request?

Yes
No
12. Mobile App

The Archibus Mobile App is an application that can be installed on smart phones and allows Craftspersons to update any Work Requests that are assigned to them.

The Mobile App provides limited functionality that includes:
- Creating a new Work Request
- Adding their time to a Work Request that is assigned to them
- Adding costs to a Work Request that is assigned to them
- Updating the status of a Work Request that is assigned to them

12.1. Log in/Set Up

Objective: Install and configure the Archibus Mobile App

Role: Craftsperson

Overview:
- Install the application
- Launch the application
- Configure the application for first use

Next Step: Use the App, create a Work Request
## Process

<table>
<thead>
<tr>
<th>Step</th>
<th>Image</th>
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<tbody>
<tr>
<td>1. Download and install the Archibus Mobile Client App Version 4.0 onto your smart phone</td>
<td><img src="archibus_client_app.png" alt="Image" /></td>
</tr>
<tr>
<td>2. Launch the application from your smart phone</td>
<td><img src="archibus_app_launch.png" alt="Image" /></td>
</tr>
<tr>
<td>3. Enter the Web Central URL: <a href="https://campusassist.sydney.edu.au/archibus/">https://campusassist.sydney.edu.au/archibus/</a></td>
<td><img src="archibus_web_url.png" alt="Image" /></td>
</tr>
<tr>
<td>4. Select Connect</td>
<td><img src="archibus_connect.png" alt="Image" /></td>
</tr>
</tbody>
</table>
5. Enter your Unikey username

6. Enter your Unikey password

7. Select **Register Device**

   **Note:** Please contact the ICT Helpdesk on (02) 9351 2000 if you do not have your unikey password.

8. Your device will register, and you'll be logged into the App.

   Next time you launch the app, these settings will be retained.

9. Select the **cog wheel** from the top right of screen
10. Check the details displaying in the User section.

To change users on a shared service, log out of the App here.

**Note:** Do Not login to multiple devices with the same username. This will result in application errors when you attempt to do anything.

11. Select the Maintenance module from the menu

12. On first use, the App will download background data. The initial download may take up to 10-15 minutes to complete. Any subsequent download and refresh will finish under 1 minute.

Once completed, the App is ready for use.
12.2. Create a Work Request

Objective
Create a Work Request in the Mobile App

Role
Craftsperson

Overview
Use the Mobile App to create and submit a Work Request.

Next Step
Update Assigned Work Requests - Time

The creation of new Work Requests is not a common task for craftspersons to undertake. However, as a result of conducting Preventative Maintenance activities, there may be requirements to create Work Requests as assets are identified as requiring corrective maintenance.

Process

<table>
<thead>
<tr>
<th>Step</th>
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<tbody>
<tr>
<td>1. Launch the Archibus Mobile App</td>
<td><img src="image1.png" alt="Archibus Mobile App" /></td>
</tr>
<tr>
<td>2. Select the <strong>Maintenance</strong> module from the menu</td>
<td><img src="image2.png" alt="Archibus Mobile App" /></td>
</tr>
<tr>
<td>3. <strong>Synchronise</strong> the App</td>
<td><img src="image3.png" alt="Archibus Mobile App" /></td>
</tr>
<tr>
<td>4. Select the <strong>My Requests</strong> button, ensure that you are in the <strong>My Requests</strong> section.</td>
<td><img src="image4.png" alt="Archibus Mobile App" /></td>
</tr>
</tbody>
</table>
5. To create a new Work Request, select the white plus button located at the top right of screen.

6. Mandatory fields that must be completed are:
   - Building
   - Floor Code (if applicable)
   - Problem Type
   - Cause Code (if known)
7. Mandatory fields that must be completed are (continued):
   - Priority
   - Description

8. Types of data entry – **Look-up fields**
   These fields prompt a selection from a data base list. Use the look-up field to display suitable options and then select the most appropriate value.

9. Types of data entry – **List Selection**
   These fields allow you to select from a list of predefined options.
10. Types of data entry – Free Text

In these fields, you may enter any text as required. Select Apply to lock in the information added into the field.

11. To submit the Work Request, click on the orange tick button at the top right of screen.

12. Your new Work Request will display in the Requested status in your My Requests section.

NOTE: Please click on Sync to send your requests to the server. Until synced, created request or updates are saved locally on your device only.

12.3. Update Assigned Work Requests – Time

- **Objective**: Update the time spent on a Work Request via the Mobile App.
- **Role**: Craftsperson
- **Overview**: Use the Mobile App to determine what Work Request have been assigned to you. Determine the priority of assigned Work Requests Input time spent on each Work Request.
- **Next Step**: Update Assigned Work Requests – Other Costs

Use the Mobile App to keep track of Work Requests that have been assigned to you and the priority in which they need to be worked on.
<table>
<thead>
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<tbody>
<tr>
<td>1. Launch the Archibus Mobile App</td>
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</tr>
<tr>
<td>3. <strong>Synchronise</strong> the App</td>
<td><img src="image3" alt="Synchronise App" /></td>
</tr>
<tr>
<td>4. Select the <strong>My Requests</strong> button, ensure that you are in the <strong>Issued</strong> section. The number displaying in the section selector indicates how many Work Requests have been assigned to you to work on.</td>
<td><img src="image4" alt="My Requests" /></td>
</tr>
<tr>
<td>5. You can see the <strong>Issued</strong> and <strong>In Process</strong> or <strong>On Hold</strong> Work Requests. You will see those assigned to you by your Supervisor in <strong>order of Priority</strong>, i.e., the tradesperson assigned or scheduled date.</td>
<td><img src="image5" alt="Requests" /></td>
</tr>
</tbody>
</table>
6. Select a Work Request to see more details

7. Within the Work Request, you can see the following information:
   - **Requestor**, who requested the Work Request
   - **Location**, where the problem is
   - **Work Request Type**, the category of work request
   - **Status**, the status of the Work Request

8. Scroll down to see more.
9. When you scroll down, you will see the following fields:

- **Description**, from the requestor identifying what the problem is and what needs to be done to fix it.
- **Customer Notes History**, a history of any comments made by the customer regarding the request.
- **New Customer Notes**, any additional notes you may enter visible to the customer.
- **New Craftsperson Notes**, any additional notes you may enter, visible between COS and supplier.

10. Once you are ready to commence work, click the **Start** button.

11. After you click on the **Start** button, the **Select Work Type** screen appears.
12. If you select the **Work** button as the Work Type, it auto-calculates the time you spend on the work request after you click on the **Start** button.

The time shows as **Job Totals** at the bottom of the screen.

13. To indicate that the Work Request has been completed, you can click on the **Stop** button at the bottom of the screen.
14. When the **Stop** button is clicked, you need to confirm if the Work Request has been completed:

**Is the job complete?**

Select the button that applies:

- Yes
- No
- No, place on Hold
15. If you select the Yes button, a screen with a Complete button appears.

**NOTE:** Please do not use the Additional Comments on this page. Please enter all notes under New Craftsperson Notes or New Customer Notes.

If the Work Request has been completed, click Complete. Once completed and synced, this work request will be removed from your mobile app.

**Note** that your supervisor is still able to update this Work Request within the Campus Assist (Archibus) web-client.

16. To confirm completion of the Work Request, select either Yes or No.

If Yes is selected, the Work Request will be indicated as Completed in the Issued and In Process section.
17. If you select No, place on hold, the status changes to On Hold and you can enter the reason for putting it on hold.

18. When you select the Resume button, it takes you to a screen where you have an option to add Comments before clicking the Resume button.

19. Once you click the Resume button, you can click the Stop button when you have completed the Work Request.
20. This then takes you back to the Is the job complete? screen.

If you click Yes, follow Steps 15-16.

12.4. Update Assigned Work Requests – Other Costs

Add other costs to a Work Request via the Mobile App.

Craftsperson

Use the Mobile App to add other costs to a Work Request, this can include:

- Parts
- Tools
- Costs (Other, such as materials used)

Update Assigned Work Requests - Statuses

Use the Mobile App to keep track of Work Requests that have been assigned to you and the priority in which they need to be worked on.

Process

<table>
<thead>
<tr>
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<tbody>
<tr>
<td>1. Launch the Archibus Mobile App</td>
<td></td>
</tr>
<tr>
<td>2. Select the Maintenance module from the menu</td>
<td></td>
</tr>
</tbody>
</table>
3. **Synchronise the App**

4. Select the **My Requests button**, ensure that you are in the **Issued** section.

   The number displaying in the section selector indicates how many Work Requests have been assigned to you to work on.

5. Work Requests are categorised by Status. You will only see Work Request that are in a status that you can work within.
   - Issued and in Process
   - On Hold

6. Select a Work Request to see more details
7. Within the Work Request, you can see the following information:

- **Requestor**, who requested the Work Request
- **Location**, where the problem is
- **Work Request Type**, the category of work request
- **Status**, the status of the Work Request

8. Scroll down to see more.

9. Within the Work Request, you can see the following information:

- **Description**, from the requestor identifying what the problem is and what needs to be done to fix it.
- **Customer Notes History**, a history of any comments made by the customer regarding the request.
• **New Customer Notes**, any additional notes you may enter visible to the customer.

• **New Craftsperson Notes**, any additional notes you may enter, visible between COS and supplier.

10. Select the different cost categories form the tabs, located at the bottom of screen.

The number represents how many instances of each category have been assigned to the Work Request.

11. **Parts**

Either adjust an existing entry or use the available fields to input a new entry.

- Select a Part Code from the list
- Select a Storage Location from the list
- Enter the Quantity Used

The + symbol clears the form which allows you to enter new information.

The ✓ saves the entry you have just made.
12. Tools

Either adjust an existing entry or use the available fields to input a new entry.

- Select the Tool Code from the list
- Enter Date Scheduled
- Enter Time Scheduled
- Enter Date Started
- Enter Time Started
- Date Finished
- Time Finished
- Enter Straight Time Hours Used (total time the tool was used for the task)

It is recommended to use the Start and Stop button timers so as to accurately record start and finish times/dates.

13. Other Costs

Use this feature to add any other costs that cannot be captured in any of the more specific craftsperson, tools and parts sections.

Either adjust an existing entry or use the available fields to input a new entry.

- Resource Type, select from the list
- Enter a description
- Enter the quantity used
- Enter the total cost into the Actual Cost field

14. Synchronise the App
12.5. Update Assigned Work Requests – Status

**Objective**
To change the status of a Work Request on a mobile device.

**Role**
Craftsperson

**Overview**
To progress the Work Request through to its completion.

Use the Mobile App to keep track of Work Requests that have been assigned to you and the priority in which they need to be worked on.

### Process

<table>
<thead>
<tr>
<th>Step</th>
<th>Image</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Launch the Archibus Mobile App</td>
<td><img src="image1" alt="Archibus Mobile App" /></td>
</tr>
<tr>
<td>2. Select the Maintenance module from the menu</td>
<td><img src="image2" alt="Maintenance Module" /></td>
</tr>
<tr>
<td>3. Synchronise the App</td>
<td><img src="image3" alt="Synchronisation" /></td>
</tr>
<tr>
<td>4. Select the My Requests button, ensure that you are in the Issued section. The number displaying in the section selector indicates how many Work Requests have been assigned to you to work on.</td>
<td><img src="image4" alt="My Requests" /></td>
</tr>
</tbody>
</table>
5. Work Requests are categorised by Status. You will only see Work Request that are in a status that you can work within.

- Issued and in Process
- On Hold

6. Select a Work Request to see more details

7. Within the Work Request, you can see the following information:

- Requestor, who requested the Work Request
- Location, where the problem is
- Work Request Type, the category of work request
• **Status**, the status of the Work Request

Scroll down to see more.

8. Within the Work Request, you can see the following information:

• **Description**, from the requestor identifying what the problem is and what needs to be done to fix it.

• **Customer Notes History**, a history of any comments made by the customer regarding the request.

• **New Customer Notes**, any additional notes made by the customer.
9. Change the Status by selecting from the drop-down list located top right of screen.

- Complete
- Hold for Parts
- Hold for Access
- Hold for Access
- Hold for Quote

Prior to selecting any status, ensure that you have added a reason into the Craftsperson’s Notes section of the Work Request.

Note: Once a Work Request has been put On Hold, the status can no longer be updated by a Craftsperson until the Work Request has been rescheduled by COS.

10. Complete Status, acknowledge the pop-up note.

Note that your supervisor is still able to update this Work Request within the Campus Assist (Archibus) web-client.

11. On Hold Status, acknowledge the pop-up note.

Note that there may be penalties imposed on your company as a result of putting Work Requests on hold without justification. It is suggested that you seek confirmation from your supervisor prior to proceeding with this action.
12. **Synchronise** to update the App

Note that Work Requests will display in the current status with a red dot until the App is synchronised.

13. **Updated Status**

Note that after the App has been Synced, Work Requests will be updated and will display in the correct status.

Completed Work Requests will no longer display for you.

You will continue to see Work Requests that are in an On-Hold status. However, you cannot work on these Work Requests until they have been rescheduled and reverted to the Issued status by COS.
13. On Demand SLAs

**Take Note**

There are specific rules in place that govern processes for specific Problem Types. Some problem types require an estimation and approval step, some don’t. Some problem types require a scheduling step, others do not. There is also variation depending on the priority rating of the Work Request.

SLAs have a direct impact on whether a Work Request can be Assigned (and subsequently Issued to a contractor).

Where an SLA states that the Work Request requires both an Estimate and a Schedule, COS is unable to Assign the request until those activities have occurred.

In this situation, only the Estimate has been approved (note the blue dot) so the Assign icon is disabled:

![Icon](image)

In this situation, both the Estimate and Schedule have blue dots, so the Assign icon is available for selection:

![Icon](image)

Where the SLA dictates that neither an Estimate nor a Schedule is mandated, the Work Request can be Assigned immediately:

![Icon](image)

This section provides information on which Problem Types require estimation/scheduling, and in which circumstances they are required.
### 13.1. Soft Services

Scenario: Estimates and/or Scheduling are required for all P3, P4 and P5 Work Requests. P4 and 5 are estimated by COS supervisor, therefore no estimation approval is required. P1 is auto-issued after approval by COS supervisor.

<table>
<thead>
<tr>
<th>Problem Types</th>
<th>SLAs by Problem Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Requested by Requestor</td>
<td>Stores and Dock</td>
</tr>
<tr>
<td>Approved by COS Supervisor</td>
<td>Cleaning General</td>
</tr>
<tr>
<td>Estimate by COS Supervisor</td>
<td>Decontamination</td>
</tr>
<tr>
<td>Estimate by Contractor</td>
<td>Confidential Waste</td>
</tr>
<tr>
<td>Schedule by Contractor</td>
<td>Laundry</td>
</tr>
<tr>
<td>Schedule by Contractor</td>
<td>Linen</td>
</tr>
<tr>
<td>Schedule by Contractor</td>
<td>Pest Control Services</td>
</tr>
<tr>
<td>Schedule by Contractor</td>
<td>Waste Biological &amp;</td>
</tr>
<tr>
<td>Schedule by Contractor</td>
<td>Clinical</td>
</tr>
<tr>
<td>Schedule by Contractor</td>
<td>Waste General</td>
</tr>
</tbody>
</table>

For P1 after approval it is auto issued.
13.2. Hard Services

Scenario: Estimates and/or Scheduling are required for all P3, P4 and P5 Work Requests. P4 and 5 are estimated by COS supervisor, therefore estimation approval is not required. P1 is auto-issued after approval by COS supervisor.
13.3. Security Services

Scenario 1: Estimation and Scheduling are completed internally by COS Supervisors for all P1-5 Work Requests.

![SLAs by Problem Type]

- **Problem Types**
  - **Security**
  - **Traffic & Parking | Temp Permit**
  - **Parking Meters**
  - **Traffic & Parking**
  - **Traffic & Parking | Barricading**

- **Requested by Requestor**
- **Approved by COS Supervisor**
- **Estimate by Contractor**
- **Schedule by Contractor**
- **Estimate & Schedule by COS Supervisor**
- **Complete by Contractor**
- **Verify by COS Supervisor**

- **Priority 1, 2, 3, 4 & 5**
  - ✔️
  - ❌
  - ❌
  - ✔️
  - ✔️
# SLAs by Problem Type

<table>
<thead>
<tr>
<th>Problem Types</th>
<th>Priority 1, 2, 3, 4 &amp; 5</th>
</tr>
</thead>
<tbody>
<tr>
<td>Security</td>
<td></td>
</tr>
<tr>
<td>Requested by Requestor</td>
<td></td>
</tr>
<tr>
<td>Approved by COS Supervisor</td>
<td>✓</td>
</tr>
<tr>
<td>Estimate by Contractor</td>
<td>×</td>
</tr>
<tr>
<td>Schedule by Contractor</td>
<td>×</td>
</tr>
<tr>
<td>Estimate &amp; Schedule by COS Supervisor</td>
<td>✓</td>
</tr>
<tr>
<td>Complete by Contractor</td>
<td>✓</td>
</tr>
<tr>
<td>Verify by COS Supervisor</td>
<td>✓</td>
</tr>
</tbody>
</table>
Scenario 2: P1-2, estimation and scheduling are completed internally by COS Security Supervisors. P3-5, estimation is completed by COS Security Supervisor, scheduled by a Contractor Supervisor, and the schedule comes back to a COS Scheduler to approve.

### SLAs by Problem Type

<table>
<thead>
<tr>
<th>Problem Types</th>
<th>Security</th>
<th>Training</th>
<th>ConciergeStaff</th>
<th>Patrol Service</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Requested by Requestor</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Approved by COS Supervisor</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Estimate by Contractor</strong></td>
<td>✗</td>
<td></td>
<td>✗</td>
<td></td>
</tr>
<tr>
<td><strong>Schedule by Contractor</strong></td>
<td>✗</td>
<td></td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td><strong>Estimate by COS Supervisor</strong></td>
<td>✓</td>
<td></td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td><strong>Schedule by COS Supervisor</strong></td>
<td>✓</td>
<td></td>
<td></td>
<td>✗</td>
</tr>
<tr>
<td><strong>Approve Schedule by COS Supervisor</strong></td>
<td>✗</td>
<td></td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td><strong>Complete by Contractor</strong></td>
<td>✓</td>
<td></td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td><strong>Verify by COS Supervisor</strong></td>
<td>✓</td>
<td></td>
<td>✓</td>
<td></td>
</tr>
</tbody>
</table>
14. Specific Rules – On Demand Work Requests

This section contains information on specific rules that apply to each service line.

Exceptions

Security

Use COS Security Operations or COS Security Technical as Work Teams for any Work Requests not assigned to a contractor (completed in house).

All Work Requests must be Ready for Review of Payment = Yes prior to being Verified.

Soft Serv.

Soft Services will use both the Trades section and the Part section in the estimating process.

Hard Serv.

Hard Service will use the Trades section only in the estimating process.
15. Planned Preventative Maintenance (PPM)

Maintenance managers use preventative maintenance procedures to define the preventive maintenance work required for maintaining locations and equipment.

This involves first outlining general procedures for planned preventative maintenance (PPM) tasks, such as safety checks, cleaning projects, filter replacements, and daily security tasks. This procedure should be written so that the procedure can apply to multiple locations or equipment items. You can outline the procedure’s various steps with individual step records, or group together all the steps in one step record. As part of setting up your procedures and steps, you can define the resources required for executing the procedure, such as the types of labour and tools required.

Once you define a PM procedure, you can assign it to particular equipment items or areas that require the planned preventative maintenance described in the procedure. For example, you can define a procedure for changing air filters and then assign it to all equipment items that require air filter changes. Once the procedures are assigned to equipment items and locations, you define a scheduling pattern for executing the procedure on these specific locations and equipment. When you generate PM work orders, the system uses the defined scheduling pattern to determine the work that should be executed on each date.

There are a suite of tools available within the Maintenance Manager for the management of PPMs:
15.1. PM Workflow

The Maintenance Manager menu items align with the key activities required to establish and manage PPM routines:
15.2. PM Planner

Once maintenance managers define PM schedules and generate the schedule dates, they can use the PM Planner for a graphical overview of the upcoming work for each week, and then drill down to individual PM Schedules to view past and future scheduled dates, along with the status of the associated work orders.

With the PM Planner, you can graphically see which jobs are coming up, which are completed, and which were missed or deferred. When you spot problems, you can edit future schedule dates directly from the PM Planner.

Objective

Planning of Preventative Maintenance

Role

COS Scheduler

Overview

Utilise the PM Planner tool to review future scheduled PM

Next Step

Define PM Procedures

Process

Select from the menu:
Use the filters available at the top of the page:

The results are displayed in Gantt chart style:

Clicking on the cog icon gives options:
- Group by Equipment Standard
- Select (add/remove) fields
- Display options
- Export to a spreadsheet
15.3. **Define Procedures**

Procedures are the instructions and resources required to complete a specific activity at a planned frequency in order to maintain an asset in line with industry standards, or for the provision of regular services as required by the University.

A procedure must contain these components:
- A Unique identifier and a link to a defined Primary Trade/Purchase Order
- Step(s), as many as required to provide instruction on what must be done
- Resources required to complete each Step. Resources can include;
  - Trades (People to do each step)
  - Parts (Any parts or materials required for each step)
  - Tools (Any equipment to do each step)

---

**Define PM Procedures**

**Objective**

System Admin/SAMP

**Role**

Set-up the procedures with corresponding steps and resources required to perform that task or activity.

**Overview**

Assign PM Procedures

**Next Step**

Navigate Here:
Use filters and click on **Show** to see existing procedures:

![Image of Archibus interface with filters and show option highlighted]

Or, click on **Add New** to create a new procedure:

![Image of Archibus interface with add new option highlighted]

To edit an existing Procedure, Select a procedure from the list:
Expanding the Procedure title will display any linked steps/trades/parts:

Key fields that are required for PM Procedures are:

<table>
<thead>
<tr>
<th>Field</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>PM Procedure</td>
<td>Free text, create a PM Procedure title as per the agreed upon naming convention.</td>
</tr>
<tr>
<td>Primary Trade</td>
<td>Select the required Primary Trade from the look-up list.</td>
</tr>
<tr>
<td>Purchase Order Code</td>
<td>Must link to a valid purchase order code (assigned to the selected Primary Trade).</td>
</tr>
<tr>
<td>Cost Type</td>
<td>For Security, use Schedule of Rates by Role or Schedule of Rates by Human Hard services will normally use PPM Cost.</td>
</tr>
<tr>
<td>PM Procedure Description</td>
<td>Free text to describe the activity.</td>
</tr>
<tr>
<td>Equipment Standard</td>
<td>Select an available equipment standard (if required). Note: you will be restricted to selecting only equipment items of this equipment standard.</td>
</tr>
<tr>
<td>PM Procedures to Supress</td>
<td>If this PM Procedure overrides another, then enter the PM Procedure(s) that are to be overridden here. Use “ “ (before and after).</td>
</tr>
<tr>
<td>Procedure Type</td>
<td>Either Location or Equipment. Security and Soft Services will typically use Location when the procedure relates to a service.</td>
</tr>
</tbody>
</table>
Problem Type | Select from available list in database.

### PM Procedure Naming Convention

Here is a sample PM Procedure Title:

PM Procedure: AGC1114M17E3N

**AGC** is an abbreviation of the Primary Trade (the company assigned the activity)

**1114M17.1** is the Equipment Standard (Hard Services)

In place of an equipment standard reference, Soft Services uses an abbreviated description E.g.: **D17DECON**

In place of an equipment standard reference, Security uses an abbreviated description E.g.: **1PATCT1AM**

**3M** is the frequency (daily, weekly, monthly, quarterly, annually etc.).

### Procedure Steps

Under a Procedure, you should only have 1 step. A step is a set of instructions that must be carried out.

The system does allow multiple steps to be created, however it is important that only 1 step is created. All instructions for the PPM task must be included in this 1 step.

<table>
<thead>
<tr>
<th>Field</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>PM Step Code</td>
<td>Enter 1 into the step code field. Do not enter any other steps or values.</td>
</tr>
<tr>
<td>Instructions</td>
<td>Provide instruction on what activities must occur. Reference any relevant standards.</td>
</tr>
</tbody>
</table>

### Trades

Under a Procedure Step, you can have multiple trades. Any trades nominated are responsible for completing the activities as instructed in the linked Procedure Step.

<table>
<thead>
<tr>
<th>Field</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Trade Code</td>
<td>Select the required Trade Code from the available list.</td>
</tr>
</tbody>
</table>
Hours Required | Amount of time that is allowed for a tradesperson to complete the activity.

The information entered into these fields will directly impact the costs incurred for the completion of this PPM activity.

**PARTS**

Under a Procedure Step, you can have multiple parts. Any parts nominated must be used in the completing of the activities as instructed in the linked Procedure Step.

<table>
<thead>
<tr>
<th>Field</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Part Code</td>
<td>If standard parts are to be replaced or used as part of completing this activity. Enter the appropriate part code here.</td>
</tr>
<tr>
<td>Qty Required</td>
<td>The number of parts that are to be used to complete the activity.</td>
</tr>
</tbody>
</table>

The information entered into these fields will directly impact the costs incurred for the completion of this PPM task.

**Tools**

Under a Procedure Step, you can have multiple tools. Any tools nominated must be used in the completing of the activities as instructed in the linked Procedure Step.

<table>
<thead>
<tr>
<th>Field</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tool Type</td>
<td>Select the required Tool Type from the available list.</td>
</tr>
<tr>
<td>Hours Required</td>
<td>Amount of time that is allowed for a use of the tool to complete the activity.</td>
</tr>
</tbody>
</table>

The information entered into these fields will directly impact the costs incurred for the completion of this PPM task.
15.4. Assign Procedures

Assign Procedures to Equipment or Locations

After defining your general preventive maintenance procedures, the next step is to assign these general procedures to specific equipment items and locations.

For example, if you have defined a general procedure for changing a filter, you can assign this procedure to each equipment item whose filter must be changed. Or, if you have a service activity performed by a patrol guard daily. That procedure can be assigned to a specific location (such as a building or a campus).

Assign Procedures to assets or locations

System Admin / SAMP

Assign previously defined procedures to the relevant asset (equipment), or location.

Define Schedules

Navigate here:
Use filters to restrict the data displayed and select **Show**:

**Equipment**

If assigning a procedure to an asset, select the **Equipment** tab: (normal when an asset is being maintained).

Once you have identified the specific asset (Equipment Code), then select it to see what Procedures have already been assigned to it:
**Note:** If the Equipment Code is bolded, then it already has procedures assigned. Un-bolded Equipment Codes don’t have a procedure assigned yet.

Procedures can be added or removed as required.

Either select a procedure and **Add Selected** in the **Available Procedures** section:

![Add Procedures](image)

Or select a procedure and **Delete Selected** from the **Assigned Procedures** section:

![Delete Procedures](image)

**Location**

If assigning a procedure to a location, select the **Location** tab (this is the normal process for security and soft services activities where a service is provided as opposed to maintenance on equipment).

![Location Tab](image)

Once you have identified the specific location, then select it to see what **Procedures** have already been assigned to it:
**Note:** If the location is bolded, then it already has procedures assigned. Un-bolded locations don’t have a procedure assigned yet.

Procedures can be added or removed as required.

Either select a procedure and then **Add Selected** in the **Available Procedures** section:

Or, select a procedure and then **Delete Selected** from the **Assigned Procedures** section:

**System**

System is used when individual equipment is grouped into an overarching system. This feature is not currently utilised by COS.
15.5. Define Schedules

Define PM Schedules

Now that the general preventive maintenance procedures have been assigned to either equipment or a location, the next step is to establish the frequency (daily, weekly, monthly etc.) that the task needs to be carried out.

This section looks at the different ways that frequencies can be configured in Archibus and what options work best for the types of services that COS provides.

**Objective**

Define Schedules

**Role**

System Admin/SAMP/Scheduler

**Overview**

Establish the frequency that an activity is to occur

**Next Step**

Define PM Schedule Dates

Process

Navigate here:
Use the available filters to display the required equipment or locations requiring schedules:

Set schedules for Equipment:
Identify the asset(s) from the Equipment-Procedures pane:

This will display the Edit PM Schedule Pane:

Key fields that require values are:

<table>
<thead>
<tr>
<th>Field</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Criticality</td>
<td>Set criticality level in line with statutory and SLA requirements.</td>
</tr>
<tr>
<td>Date for first PM</td>
<td>Enter the date on which the job is to be first executed.</td>
</tr>
<tr>
<td>Days Late Boundary</td>
<td>For hard services this is normally set at 15 before and after. This provides 1 month for the contractor to complete the scheduled maintenance task.</td>
</tr>
<tr>
<td>Days Early Boundary</td>
<td></td>
</tr>
<tr>
<td>Due Date from?</td>
<td>SLA or PM Schedule</td>
</tr>
<tr>
<td>Fixed or Floating</td>
<td>Fixed – if you want to use the Date for First PM as the starting date.</td>
</tr>
</tbody>
</table>
Floating – if you want to use the Date of Last PM as the starting date.

<table>
<thead>
<tr>
<th>Interval Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Floating – if you want to use the Date of Last PM as the starting date.</td>
</tr>
<tr>
<td>Current Frequency</td>
<td>Regular options include: days, weeks, months, quarters, and years.</td>
</tr>
<tr>
<td></td>
<td>Irregular option is: Recurrence Pattern</td>
</tr>
<tr>
<td>Freq. 1 Interval</td>
<td>Enter a value. If Current Frequency is set to 1, it will reference this value.</td>
</tr>
<tr>
<td>Freq. 2 Interval</td>
<td>Enter a value. If Current Frequency is set to 2, it will reference this value.</td>
</tr>
<tr>
<td>Freq. 3 Interval</td>
<td>Enter a value. If Current Frequency is set to 3, it will reference this value.</td>
</tr>
<tr>
<td>Freq. 4 Interval</td>
<td>Normally set to 0. If Current Frequency is set to 4, it will reference this value and the schedule won’t be active.</td>
</tr>
</tbody>
</table>

Interval Types: Days, Weeks, Months, Quarters, Years

When using one of these intervals, you have the option of setting a frequency based upon the type of interval.

Example as per the screen capture:
- Selecting interval type of **Years**
- Set the Current Frequency to 1
- Freq. 1 Interval is set to 1

Result: The schedule is set to run 1 time every 1 year.

If the Current Frequency were changed to 4, the result would be: The schedule is set to run 1 time every 0 year. This is the same as never, or inactive.

**Note:** Using interval Type and Frequency values in this way is most typical for Hard Services.

Interval Types: Recurrence Pattern

Where more flexibility is required, selecting the Interval Type of **Recurrence Pattern** provides options.
Note: Using interval Type and Frequency values in this way is most typical for Security and Soft Services where PM is used for scheduling of service orientated tasks. This option provides flexibility for daily tasks, with additional options for different schedules resulting from public holidays, semester breaks etc.
15.6. Define PM Schedule Dates by PM Schedule

This feature allows for the generation of scheduled dates.

Typically, this is an annual activity, so the dates will most likely be scheduled and generated for a period covering a calendar year.

Define PM Schedule Dates

Scheduler

An annual activity where the schedule dates are set for the coming 12 months.

Generate Work Orders

Navigate here:
Filter as required and select **Show**:

Select the required schedules and **Generate**:

Set Date Range. Typically, this is an annual activity so set a date range from the beginning of a calendar year until the end of the calendar year unless a more specific date range is required.
Once the schedules are submitted, you can click into a specific PM Schedule Code to see the schedule dates that have been created:
15.7. Define PM Schedule Groups

This feature is not currently utilised.

It is possible to group PM schedules by Primary Trade for ease of management/scheduling.

Process

Navigate here:

Within this feature, you have the option to:
- Add a new grouping
- Edit an existing grouping
- Delete an existing grouping
**Note** that if the PM Schedules is greyed out, there are no schedules associated with that particular group.

**Edit a Group**

To Edit an existing group, select that group and click on the Edit button.

The Edit frame will display to the right and you can change these fields:

- PM Schedule Group – this is the name of the group
- PM Schedule Group Description – this is a description of the group

Typically, groups will be created to align with a Primary Trade. Using the Primary Trade in both the group name and description should clearly identify what the group relates to.

**Create a New Group**

To Add a new group, click on the Add New button.

The Edit frame will display to the right and you can add values to these fields:

- PM Schedule Group – this is the name of the group
- PM Schedule Group Description – this is a description of the group

Typically, groups will be created to align with a Primary Trade. Using the Primary Trade in both the group name and description should clearly identify what the group relates to.
View PM Schedules

This is a feature that provides visibility of schedules.

Select whether you want to view schedules that relate to either:

- An item of equipment
- A particular location/room
- A primary trade
- A grouping

Once a selection has been made, all schedules will be displayed relating to the equipment, location, primary trade or group.

Use the filters at the top of the frame to restrict the records displayed.

Select an item to view the relevant schedules:

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<table>
<thead>
<tr>
<th>Equipment Code</th>
<th>Equipment Brand</th>
<th>Model</th>
<th>Reseller Code</th>
<th>Floor Code</th>
<th>PM Schedule</th>
</tr>
</thead>
<tbody>
<tr>
<td>11133</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>000-31:1250-1200</td>
<td></td>
<td>1480</td>
<td>000-13</td>
<td>000-13</td>
<td></td>
</tr>
<tr>
<td>000-31:1250-1400</td>
<td></td>
<td>1480</td>
<td>000-13</td>
<td>000-13</td>
<td></td>
</tr>
<tr>
<td>000-31:1500-1400</td>
<td></td>
<td>1480</td>
<td>000-13</td>
<td>000-13</td>
<td></td>
</tr>
</tbody>
</table>
15.9. Generate Work Orders

Generate PM Work Orders

At periodic intervals, you must determine the upcoming maintenance work and have the system generate work orders for executing this work by running the Generate PM Work Orders task. This will normally be done by the Scheduler at the beginning of each month.

With the Generate PM Work Orders task, you instruct the system to generate work requests -- complete with required parts, labour, and tools -- based on the PM procedures and schedules that are due during the specified date range. This action groups the generated work requests onto work orders based on grouping criteria that you specify.

If you have defined preventive maintenance SLAs, the system matches work requests to the appropriate SLA, which dictates the time to complete, time to respond, craftsperson assignment, and if the generated work order should be automatically issued.

The basic process is:
1. Specify the work for which you will generate work orders.
2. Generate work orders.
3. View generated work orders.

Generate Work Orders

Scheduler / Automation

Monthly task whereby the next 3 months’ worth of PM Work Requests are generated. These are visible to the Contractor in the Maintenance Console so that they can Forecast and Schedule resources in advance.

Issue Work Orders

Navigate here:
Note: As you work through this task, you will be working with either location work or equipment work. The task presents separate tabs for generating equipment or location work orders. Once you select a tab, the process is the same:

Select the PM schedules that you want to generate Work Orders for. Use the available filters and select a date range, then click Next:

Specify Work Order Groupings and Generate Work Orders

The next step in generating schedules is to set a grouping.

In most scenarios, since a PM procedure can be associated with the trade required to execute it, you may wish to group your generated PM work according to Primary Trade. For example, all due work requiring a plumber would be one work order, all due work requiring a technician would be another.
Once a selection has been made, click on **Generate**:

![Generate PM Work Orders](image)

The system will generate the Work Orders. Upon successful completion, a report is available to export and open in Microsoft Excel. You can click on `ab-pm-rpt-pm-wo.axvw` to access a report of the work orders that were just generated.

![Generate PM Work Orders](image)

Alternatively, you can directly access the work orders that were just generated by running the View Active PM Work Orders task and setting the same filter as you set at the beginning of this process:
15.10. Issue Work Orders

The final step in the PPM process is to release the generated Work Orders. This process is conducted in the Maintenance Module. The process is the same as releasing Reactive and Corrective Work Orders. As such, refer to Section 8 - COS Issue a Work Order to a Contractor for detailed instructions.

Objective

Issue Work Orders

Role

COS Scheduler

Next Step

Scheduling and Issuing of Work Requests in the Maintenance Console.
16. Preventative Maintenance SLAs

16.1. SLA – Hard and Soft Services

<table>
<thead>
<tr>
<th>SLAs by PM Type</th>
<th>PM Work Requests for Hard and Soft Services</th>
</tr>
</thead>
<tbody>
<tr>
<td>Approved</td>
<td>System (Auto)</td>
</tr>
<tr>
<td>Assigned W.O.</td>
<td>System (Auto)</td>
</tr>
<tr>
<td>Pre-Estimated</td>
<td></td>
</tr>
<tr>
<td>Schedule</td>
<td>OPTIONAL</td>
</tr>
<tr>
<td>Schedule</td>
<td>by COS Scheduler</td>
</tr>
<tr>
<td>Schedule</td>
<td>by Contractor</td>
</tr>
<tr>
<td>Approve Schd</td>
<td>by COS Scheduler</td>
</tr>
<tr>
<td>Issue W.R.</td>
<td>by COS Scheduler</td>
</tr>
<tr>
<td>Complete</td>
<td>by Contractor</td>
</tr>
<tr>
<td>Verify</td>
<td>by COS Supervisor</td>
</tr>
</tbody>
</table>
16.2. SLA – Security Electronics / Locksmiths

SLAs by PM Type

PM Work Requests for Electronic Security and Locksmithing only

- Approved System (Auto) ✔
- Assigned W.O. System (Auto) ✔
- Pre-Estimated ✔
- Schedule OPTIONAL ✗
- Schedule by COS Scheduler ✔
- Schedule by Contractor ✗
- Approve Schd by COS Scheduler ✗
- Issue W.R. by COS Scheduler ✔
- Complete by Contractor ✔
- Verify by COS Supervisor ✔
16.3. SLA – Security Services

SLAs by PM Type

PM Work Requests for Security Services only

- **Approved**
  - System (Auto)
  - ✔️

- **Assigned W.O.**
  - System (Auto)
  - ✔️

- **Pre-Estimated**
  - ✔️

- **Schedule**
  - **OPTIONAL**
  - ❌

- **Schedule**
  - by COS Scheduler
  - ❌

- **Schedule**
  - by Contractor
  - ✔️

- **Approve Schd**
  - by COS Scheduler
  - ✔️

- **Issue W.R.**
  - by COS Scheduler
  - ✔️

- **Complete**
  - by Contractor
  - ✔️

- **Verify**
  - by COS Supervisor
  - ✔️
17. Specific Rules – PPM Work Requests

This section contains information on specific rules that apply to each service line.

⚠️ Exceptions

**Security**

Scheduling is required for PPM Work Requests to be issued by the COS Scheduler
- For Security Operations, the PPM Scheduling will be entered by the Contractor
- For Security Electronics and Locksmiths, the scheduling will be entered by the COS Scheduler.

**Soft Serv.**

All Soft Services PPM Work Requests must be scheduled prior to being Issued by the COS Scheduler. The exception to this rule is that non-labour based Work Requests do not require scheduling.

**Hard Serv.**

Scheduling is not required for PPM Work Requests to be issued by the COS Scheduler.
18. Support

Any questions relating to Campus Assist should be directed through to the Shared Service Centre.

Visit the Services Portal to view all available request types, or use the Campus Assist support request for general enquiries.

Alternatively, please call: +61 (2) 9351 2000 (12000 from internal phones).