

# UNIVERSITY OF TENNESSEE

ARCHIBUS Business Manager

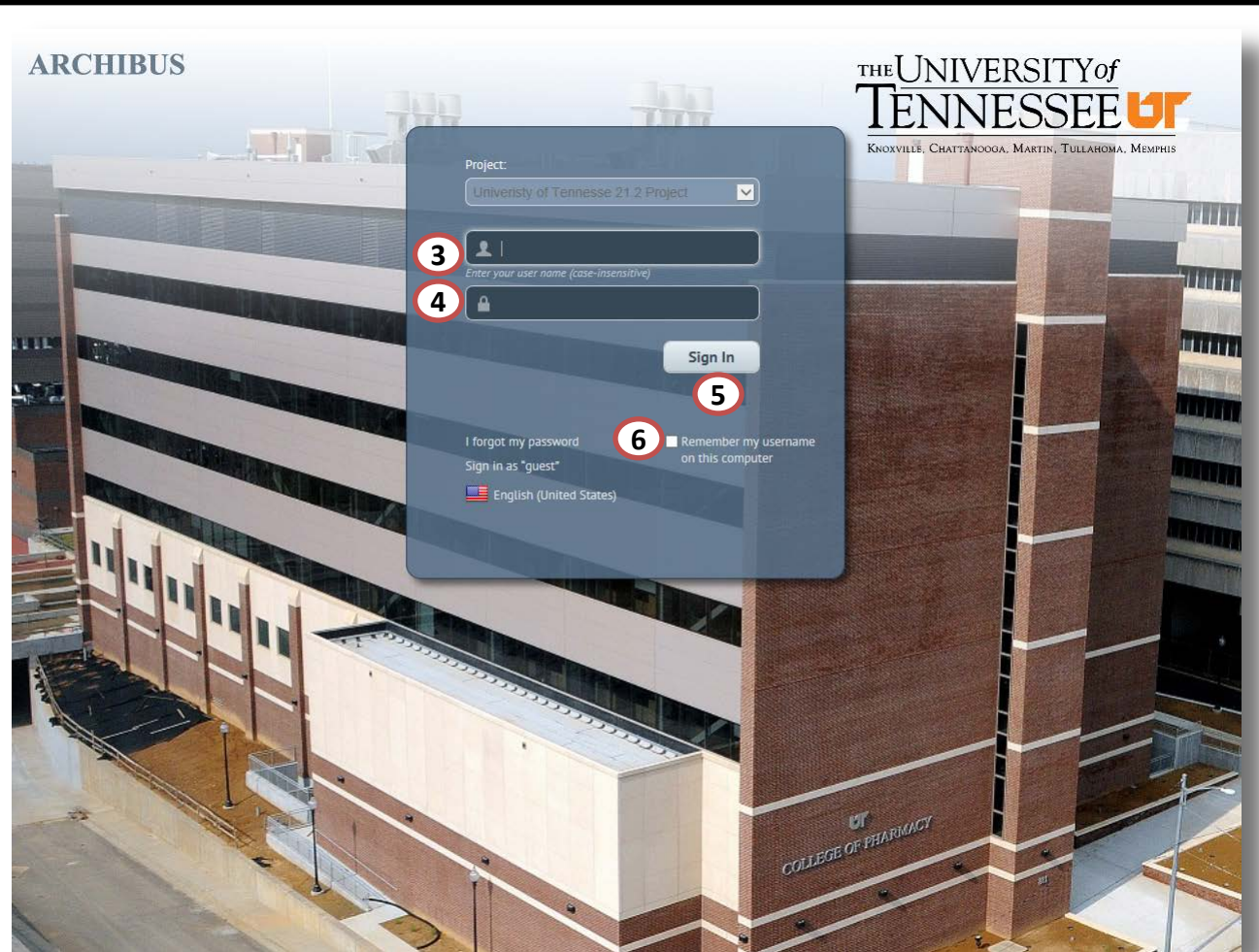
User Manual

July 25, 2014



## Log In Screen

1. Open your Internet browser.
2. Enter the URL to view the ARCHIBUS Login Page:  
[archibus.tennessee.edu](http://archibus.tennessee.edu)
3. Enter your **NetID** in the user name field.
4. Enter your **Password** in the password field.
5. Select Sign In.
6. Check off "Remember my username on this computer" to pre-fill your Username on next login. The password is still required



# ARCHIBUS Web Central Requesting Service



## Building Operations Console

The Building Operations Console is where you can manage your daily work request activities from a single web page.

1. On the Process Navigator, click on the On Demand Work application, click on the Client process, and click on the Building Operations Console task.
2. To create a new service request, click on the Request Service button.
3. Use the Filter Console to filter your results by specific restriction criteria.
4. Click on the More button to display additional fields on the filter console.

The screenshot displays the Building Operations Console interface. At the top, there is an orange header bar with the title "Building Operations Console" and a "Request Service" button. Below the header, there is a filter console with various dropdown menus for "Building", "Floor", "Room", and "Problem Type". A "More" button is circled in red with the number 4, indicating it is the focus of the instruction. The main area shows a table of work orders under the heading "Assigned to Work Order". The table has columns for "Work Request Code", "Problem Type", "Location", "Work Description", and "Due Date". Two work orders are listed: one for "CEILING TILE" and another for "ELECTRICAL - REPAIR/REPLACE". A "Total records: 2" label is visible at the bottom left of the table area.

Work Request Code	Problem Type	Location	Work Description	Due Date
541	CEILING TILE	50110210-02	The ceiling tile by the elevator is...	
542	ELECTRICAL - REPAIR/REPLACE	50110100-02	Electrical power is not currently available in ...	

## Building Operations Console

Once you click the Request Service button you can:

1. Update Requestor information. You can add a Requested For name to include this employee in future notifications of work statuses. Auto-update College ID, Fund ID & Location by clicking one of the "Same as" boxes. Or manually update your Phone number, College ID, or Location.
2. Make sure your Cost Center is in the Fund ID field for chargeable work.
3. Enter a specific location so workers can find the problem.
4. Chose from a drop-down list of Type of Problems and Problem Detail. If "Other" is chosen, you must enter additional details.

### Report Problem

#### Requestor

Requested By\* CLINT

Requestor Phone

**1** Requested For

Same as Requestor

Same as Requested For

College ID\* 70101

Fund ID\* E010135011 **2**

#### Location

Use your assigned workspace location

Location\* KNOX 50110100 FLOOR ROOM NUMBER

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

Describe the location

Enter the location specifically enough that maintenance can find it, such as "Problem is on back wall, below window." **3**

#### Problem

Type of Problem\* CHILLER **4**

Problem Detail\* CHILLER-OTHER

[View All Problem Types](#)

The more precisely you specify your problem, the better we can route it to people who can help.

## Building Operations Console

1. Enter a detailed description of the issue if you select a type of problem or problem detail of "OTHER"
2. The Workflow area will show you exactly how a problem is routed and what approvals are required.
3. Click Submit to send the request off for approvals or to start work.

### Report Problem

#### Problem

Type of Problem\*

Problem Detail\*

[View All Problem Types](#)

The more precisely you specify your problem, the better we can route it to people who can help.

#### Description

Description

1

[Select Description](#)

2

#### Workflow

Workflow Steps:

On status of Requested: Facility Approval is required by an employee with Service Desk Role Business Manager

Request will be supervised by CKENT

3

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



## Building Operations Console

5. The filter console includes a Group By selection that enables you to select how you would like to group the data. For example, the data to the right is grouped by Status.
6. Click on the Filter button to return the specified results.
7. Click on the Clear button to clear the filter.
8. Click on the Work Request number to view the work request details.

The screenshot displays the 'Building Operations Console' interface. At the top, there is an orange header bar with the title 'Building Operations Console' and a 'Request Service' button. Below the header, there is a filter console with a 'Show All' dropdown, a 'Recent' dropdown, and a 'Group By' dropdown set to 'Status'. There are also buttons for 'More', 'Clear', and 'Filter'. The main content area shows a table of work requests under the heading 'Assigned to Work Order (2)'. The table has columns for 'Work Request Code', 'Problem Type', 'Location', 'Work Description', and 'Due Date'. Two work requests are listed: one with code '541' and problem type 'CEILING TILE', and another with code '8' and problem type 'ELECTRICAL - REPAIR/REPLACE'. The '8' is circled in red. At the bottom left, it says 'Total records: 2'.

Work Request Code	Problem Type	Location	Work Description	Due Date
<input type="checkbox"/> 541	CEILING TILE	50110210-02	The ceiling tile by the elevator is...	
<input type="checkbox"/> 8	ELECTRICAL - REPAIR/REPLACE	50110100-02	Electrical power is not currently available in ...	

# ARCHIBUS Web Central Viewing Request Detail





## Building Operations Console

The Building Operations Console is where you can manage your daily work request activities from a single web page.

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2. To create a new service request, click on the Request Service button.
3. Use the Filter Console to filter your results by specific restriction criteria.
4. Click on the More button to display additional fields on the filter console.

**Building Operations Console** 2 + 🔍 📧

**3** Request Service 🔗 ⚙️

Show **All** ▼ Building ⋮ Floor ⋮ Room ⋮ Problem Type ⋮ More Clear Filter

Recent ▼ Group By Status ▼ **4**

0 selected

Work Request Code  Problem Type  Location  Work Description  Due Date

▼ **Assigned to Work Order**  (2)

<input type="checkbox"/> 541	CEILING TILE	50110210-02	The ceiling tile by the elevator is...
<input type="checkbox"/> 542	ELECTRICAL - REPAIR/REPLACE	50110100-02	Electrical power is not currently available in ...

Total records: 2

## Building Operations Console

5. The filter console includes a Group By selection that enables you to select how you would like to group the data. For example, the data to the right is grouped by Status.
6. Click on the Filter button to return the specified results.
7. Click on the Clear button to clear the filter.
8. Click on the Work Request number to view the work request details.

The screenshot displays the Building Operations Console interface. At the top, there is a header bar with the title "Building Operations Console" and a "Request Service" button. Below the header, there is a filter console with a "Show" dropdown set to "All", a "Group By" dropdown set to "Status", and buttons for "More", "Clear", and "Filter". The "Filter" button is circled with a red '6'. Below the filter console, there is a table of work requests. The table has columns for "Work Request Code", "Problem Type", "Location", "Work Description", and "Due Date". The table is grouped by "Status" with a sub-header "Assigned to Work Order" and a count of "(2)". The first row is for work request code "541" with problem type "CEILING TILE" and location "50110210-02". The second row is for work request code "8" with problem type "ELECTRICAL - REPAIR/REPLACE" and location "50110100-02". The "8" is circled with a red '8'. At the bottom left, it says "Total records: 2".

Work Request Code	Problem Type	Location	Work Description	Due Date
▼ Assigned to Work Order (2)				
<input type="checkbox"/> 541	CEILING TILE	50110210-02	The ceiling tile by the elevator is...	
<input type="checkbox"/> 8	ELECTRICAL - REPAIR/REPLACE	50110100-02	Electrical power is not currently available in ...	

## Building Operations Console

9. Review the work request information. To view the details on a panel, click on the inverted triangle and the panel will display.
10. To close the panel, click on the downward triangle.
11. After you have reviewed the work request, click on the Close button.

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### Work Request

#### Problem

Work Request Code 541 Problem Type CEILING TILE

Description The ceiling tile by the elevator is...

Problem Location

⌵

#### More Information

Service Request Code 526	Work Order 521
Requested by AFM	Date Required
Priority Default	Time Required
Date Requested 06/24/2014	Time Requested 9:06 PM
Location 50110210-02-	College ID 70117 <span style="float: right;">⋮</span>
Account Code <input type="text" value=""/> <span style="float: right;">⋮</span>	Fund ID E011740 <span style="float: right;">⋮</span>
Status Assigned to Work Order <span style="float: right;">⌵</span>	Equipment Code
Document 1 <input type="text" value="Upload a document"/> <span style="float: right;">⬆</span>	Document 2 <input type="text" value="Upload a document"/> <span style="float: right;">⬆</span>
Document 3 <input type="text" value="Upload a document"/> <span style="float: right;">⬆</span>	Document 4 <input type="text" value="Upload a document"/> <span style="float: right;">⬆</span>

▶

#### History

▶

#### Trades

▶

#### Parts

▶

#### Craftspersons

▶

#### Tools

▶

#### Other Costs

#### Estimated Costs

Estimated Cost of Labor 0.00

#### Actual Costs

Cost of Labor 0.00

11  
Close

# ARCHIBUS Web Central Approving Service Requests



## Building Operations Console

The Building Operations Console is where you can manage approvals from a single web page.

1. On the Process Navigator, click on the On Demand Work application, click on the Client process, and click on the Building Operations Console task.
3. Use the Filter Console to filter your results by specific restriction criteria.
4. Click on the More button to display additional fields on the filter console.

**Building Operations Console** 2 + 🔍 📧

**3** Request Service 🔗 ⚙️

Show **All** ▼ Building ⋮ Floor ⋮ Room ⋮ Problem Type ⋮ More Clear Filter

Recent ▼ Group By **Status** ▼ **4**

0 selected

Work Request Code  Problem Type  Location  Work Description  Due Date

▼ **Assigned to Work Order**  (2)

<input type="checkbox"/> 541	CEILING TILE	50110210-02	The ceiling tile by the elevator is...	
<input type="checkbox"/> 542	ELECTRICAL - REPAIR/REPLACE	50110100-02	Electrical power is not currently available in ...	

Total records: 2

## Building Operations Console

5. The filter console includes a Group By selection that enables you to select how you would like to group the data. For example, the data to the right is grouped by Status.
6. Click on the Filter button to return the specified results.
7. Click on the Clear button to clear the filter.
8. Click on the Work Request number to view the work request details.

The screenshot displays the Building Operations Console interface. At the top, there is a header bar with the title "Building Operations Console" and a "Request Service" button. Below the header, there is a filter console with a "Show All" dropdown, a "Group By" dropdown set to "Status", and buttons for "More", "Clear", and "Filter". The "Filter" button is circled with a red '6'. Below the filter console, there is a table of work requests. The table has columns for "Work Request Code", "Problem Type", "Location", "Work Description", and "Due Date". The table is grouped by "Assigned to Work Order" with a sub-group of "(2)". The first row is for work request 541, with problem type "CEILING TILE" and location "50110210-02". The second row is for work request 8, with problem type "ELECTRICAL - REPAIR/REPLACE" and location "50110100-02". The "8" is circled with a red '8'. At the bottom left, it says "Total records: 2".

Work Request Code	Problem Type	Location	Work Description	Due Date
▼ Assigned to Work Order <input type="checkbox"/> (2)				
<input type="checkbox"/> 541	CEILING TILE	50110210-02	The ceiling tile by the elevator is...	
<input type="checkbox"/> 8	ELECTRICAL - REPAIR/REPLACE	50110100-02	Electrical power is not currently available in ...	

## Building Operations Console

9. Basic problem details are shown at the top.
10. To view the details on a panel, click on the inverted triangle and the panel will display.
11. To close the panel, click on the downward triangle. Verify that the Cost Center in the Fund ID field is valid, if not then you can change it by clicking the ... on the right of the field and then pick the appropriate cost center to be used for billing.
12. After you have made your changes to the work request, click on the Update Request button.

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### Work Request

9 **Problem**

Work Request Code 682 Problem Type CEILING TILE-DAMAGED OR MISSING

Description Please adjust the equipment specified on this request.

Problem Location LEFT SIDE OF ROOM

11 **More Information**

Service Request Code 662	Work Order 625
Requested by CLINT	Date Required
Priority Default	Time Required
Date Requested 07/1/2014	Time Requested 6:24 PM
Location 50110100-02-204	College ID <input type="text" value="70101"/>
Account Code <input type="text"/>	Fund ID <input type="text" value="E010135011"/>
Status <span style="border: 1px solid #ccc; padding: 2px;">Assigned to Work Order</span>	Equipment Code
Document 1 <input type="text" value="Upload a document"/>	Document 2 <input type="text" value="Upload a document"/>
Document 3 <input type="text" value="Upload a document"/>	Document 4 <input type="text" value="Upload a document"/>

10 **History**

- Trades
Add
- Parts
Add
- Craftspersons
Add
- Tools
Add
- Other Costs
Add

**Estimated Costs**

Estimated Cost of Labor 0.00

Estimated Cost of Parts 0.00

Estimated Cost of Tools 0.00

**Actual Costs**

Cost of Labor 0.00

Cost of Parts 0.00

Cost of Tools 0.00

12
Update Request
Close



## Building Operations Console

1. You may view details of the service request by clicking on the number once again, or:
2. Click the APPROVE button if cost center information was correct and work can now progress.

**Building Operations Console**

Show  Building

0 selected

<input type="checkbox"/>	Work Order	Work Request #	Problem Type	Location	Work Description	
<b>▼ Requested</b> <input type="checkbox"/> (1)						
<input type="checkbox"/>		<a href="#">201500094</a> <b>1</b>	CHILLER-OTHER	<a href="#">50110100</a>	<a href="#">KEVIN</a>	<b>2</b> <input type="button" value="Approve *"/>
<b>▼ Stopped</b> <input type="checkbox"/> (1)						
<input type="checkbox"/>	301500016	<a href="#">201500018</a>	CHILLER-OTHER	<a href="#">50110100</a>	<a href="#">Kevin</a>	

# ARCHIBUS Web Central Scheduling Substitutes



## Schedule Substitutes

When SLAs route work to various parties for approval, review, execution, estimation, scheduling, etc. , it is important that the party receiving the request respond in a timely manner so that the work process flows and a job is not stopped while waiting for a response.. One potential cause for delay is if users to whom work is routed are absent. In this case, the service desk manager can answer the steps assigned to these workers, or can forward these steps to other people; however, this must be done individually request by request. Instead of this manual re-assignment, you may wish to assign one or more substitutes for employees and craftspersons.

1. On the Process Navigator, click on the On Demand Work application, click on the Business Manager process, and click on the Review Approved Service Requests task.
2. Click on the Add New button to add or assign a substitute.

### Schedule Substitutes 2

**Workflow Substitutes** Add New Refresh **Workflow Substitutes** Save Delete Cancel

No records to display.

Employee Name	Substitute Employee Name
BUSMAN	CKENT
Start Date Unavailable	End Date Unavailable
6/30/2014	7/3/2014
Comments	
CKENT will review work requests during this time frame.	

## Schedule Substitutes

3. Enter or update the values for all applicable fields (required fields are designated with a red asterisk).
4. Enter a start and end date.
  - Substitutes can be either permanent or temporary.
  - Temporary substitutes execute tasks only during a defined date range. For example, if you know that a party is going on vacation, you can assign a substitute to whom the system will route work during this period.
  - If there are no dates specified, then the defined substitute is “permanent” and the system routes work to both the main responder and the substitute. A permanent sub is an extra set of eyes on a request, in case it's needed. Presumably, the sub knows when the main responder is out of the office and so knows when they must act on the request.
5. Click on the Save button.

### Schedule Substitutes

Workflow Substitutes Add New Refresh Workflow Substitutes **3** Save Delete Cancel **5**

No records to display.

Employee Name	BUSMAN	Substitute Employee Name	CKENT
Start Date Unavailable	6/30/2014	End Date Unavailable	7/3/2014
Comments			
CKENT will review work requests during this time frame.			

## Schedule Substitutes

5. To edit a substitute, select the substitute from the Workflow Substitutes panel.
6. Edit the values for all applicable fields (required fields are designated with a red asterisk).
7. Click on the Save button to save your changes.
8. Click on the Delete button to delete the cause type.

### Schedule Substitutes

Workflow Substitutes Add New Refresh

Start Date Unavailable Substitute Employee Name

6/30/2014 CKENT

### Workflow Substitutes

Save Delete Cancel

Employee Name Substitute Employee Name

UTADMIN CKENT

Start Date Unavailable End Date Unavailable

6/30/2014 7/3/2014

Comments

CKENT will review work requests during this time frame.

# ARCHIBUS Web Central Reviewing Billed Work Orders



## Review Billed Work Orders

The Review Billed Work Orders task is used to review chargeable work orders that are completed and in “Ready to Bill” status.

1. On the Process Navigator, click on the On Demand Work application, click on the Business Manager role or process and click on the Review Billed Work Orders task.
2. Use the Filter Console to filter your results by specific restriction criteria and click on the Search button.
3. If you do not want to enter a restriction, click Show All without making any entries, and the data is presented without a restriction.

2
3

**Search Billed Work Orders** Search Show All

From Work Order <input type="text"/>	To Work Order <input type="text"/>	Primary Work Type <input type="text"/>	
Building Code <input type="text"/>	Fund ID <input type="text"/>	Shop Code <input type="text"/>	
IRIS Batch ID <input type="text"/>	From Date Created <input type="text"/>	To Date Created <input type="text"/>	

**Review Billed Work Orders** XLS

	Work Order Code	Building Code	Account Code	Primary Trade Required	Fund ID	Number of Open Requests	Lock Work Order	Work Order is Chargeable?	Work Order Ready for Bill?	Total Cost	Cost of Labor
<a href="#">Details</a>	245	50110100				0	Locked	Yes	Yes	1,240.00	1,240.00
<a href="#">Details</a>	246	50110100				1	Locked	Yes	Yes	465.00	465.00
<a href="#">Details</a>	247	50110100				1	Locked	Yes	Yes	0.00	0.00
<a href="#">Details</a>	252	50110100				1	Locked	No	Yes	1,395.00	1,395.00



## Review Billed Work Orders

4. Click on the Select button next to the work order you wish to view.
5. The Work Order details view is displayed and is locked therefore it is not editable.
6. To close the pop-up window, click on the "X", located on the top right corner of the window.
7. To generate the view in Excel format, click on the XLS button.

**Search Billed Work Orders** Search Show All

From Work Order  To Work Order  Primary Work Type

Building Code  Fund ID  Shop Code

IRIS Batch ID  From Date Created  To Date Created

---

**Review Billed Work Orders** XLS

Work Order Code	Building Code	Account Code	Primary Trade Required	Fund ID	Number of Open Requests	Lock Work Order	Work Order is Chargeable?	Work Order Ready for Bill?	Total Cost	Cost of Labor
<a href="#">Details</a>	245	50110100			0	Locked	Yes	Yes	1,240.00	1,240.00
<a href="#">Details</a>	246	50110100							0.00	0.00
<a href="#">Details</a>	247	50110100							0.00	0.00
<a href="#">Details</a>	252	50110100							0.00	0.00

**Work Order**

Work Order Code: 245      Number of Open Requests: 0

Primary Work Description: 2nd billable work request.

Lock Work Order:       Work Order is Chargeable?:

Work Order Ready for Bill?:       Building Code: 50110100

Primary Trade Required:       Account Code:

College ID:       Fund ID:

---

**Progress**

Date Work Order Created	05/18/2014	Time Work Order Created	9:33 PM
Date to Perform		Time to Perform Work	
Date Work Order Issued	05/18/2014	Time Work Order Issued	9:33 PM
Date Work Order Completed	05/18/2014	Time Work Order Completed	9:35 PM

---

**Costs**

Cost of Labor	1,240.00	Cost of Parts	0.00
Cost of Tools	0.00	Other Costs	0.00
<b>Total Cost</b>	<b>1,240.00</b>		

## Log Out Screen

1. To logout of your application session, click Sign Out on the Navigation Bar.

The screenshot displays the ARCHIBUS Web Central interface. The browser address bar shows the URL <https://utenn.iwm...> and the page title is "ARCHIBUS Web Central". The navigation bar includes the ARCHIBUS logo, the text "ARCHIBUS", a dropdown menu for "AFM", a "Sign Out" button, and a "Help" link. Below the navigation bar is a search bar with the placeholder text "Find a form or report". A dark sidebar on the left contains the following menu items:

- Capital Project Management
- Space Planning & Management
- Building Operations
- Workplace Services
- System Administration

The main content area features a large, light gray watermark of the ARCHIBUS logo, which consists of a stylized 'A' inside a square with a circle above and below it. Below the watermark, the text "ARCHIBUS" and "The #1 Solution for Total Infrastructure and Facilities Management" is displayed.