

Archibus Mobile

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V1.2



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Estate Management
We are entrusted and empowered to create outstanding
campus environments and experiences.

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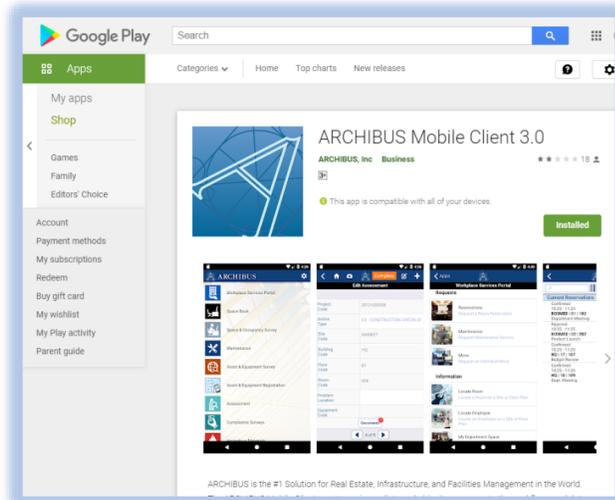
Courage

Passion

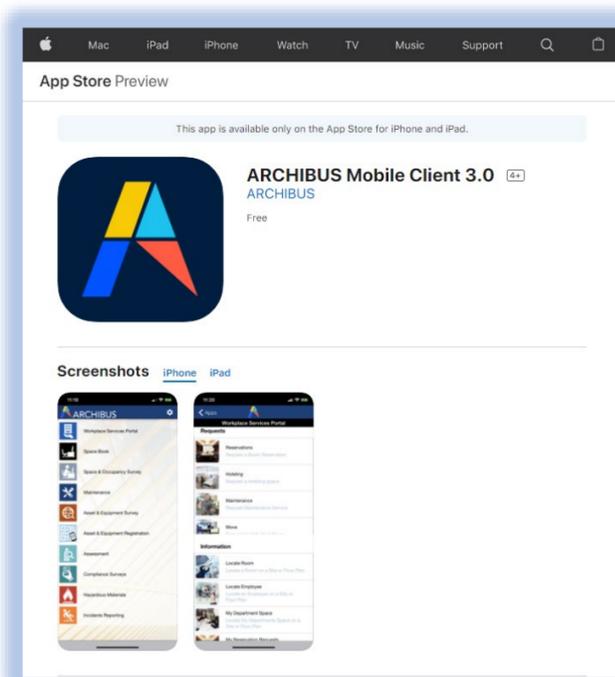
Pride

Integrity

Download



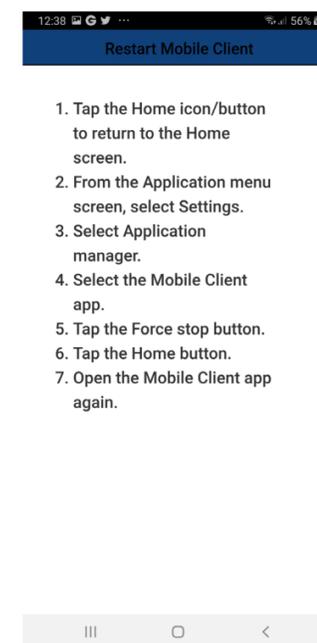
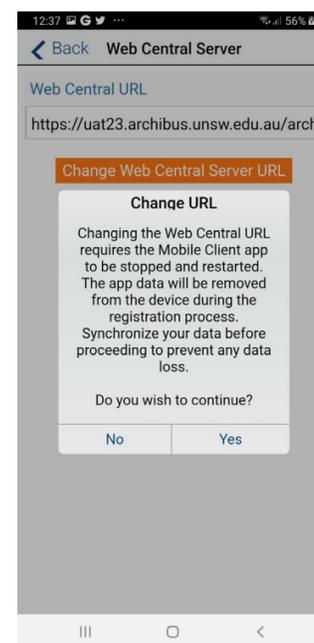
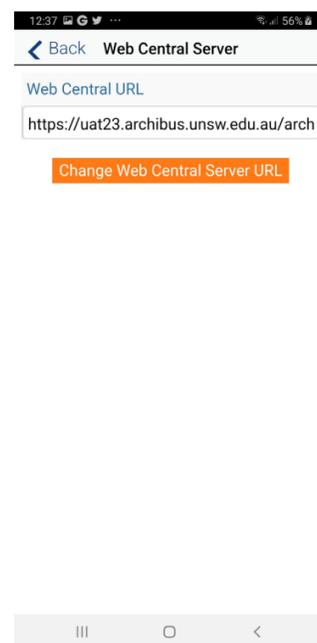
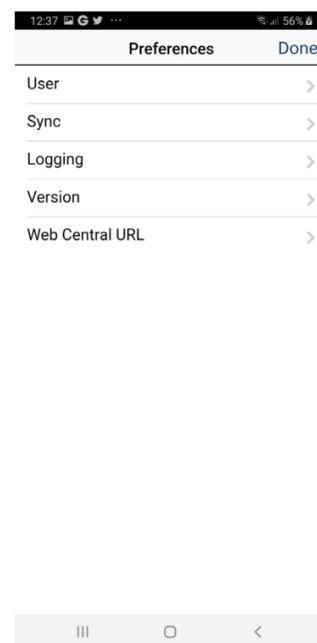
- Android devices – download from the Google Play store:
<https://play.google.com/store/apps/details?id=com.archibus.mobileclient3>



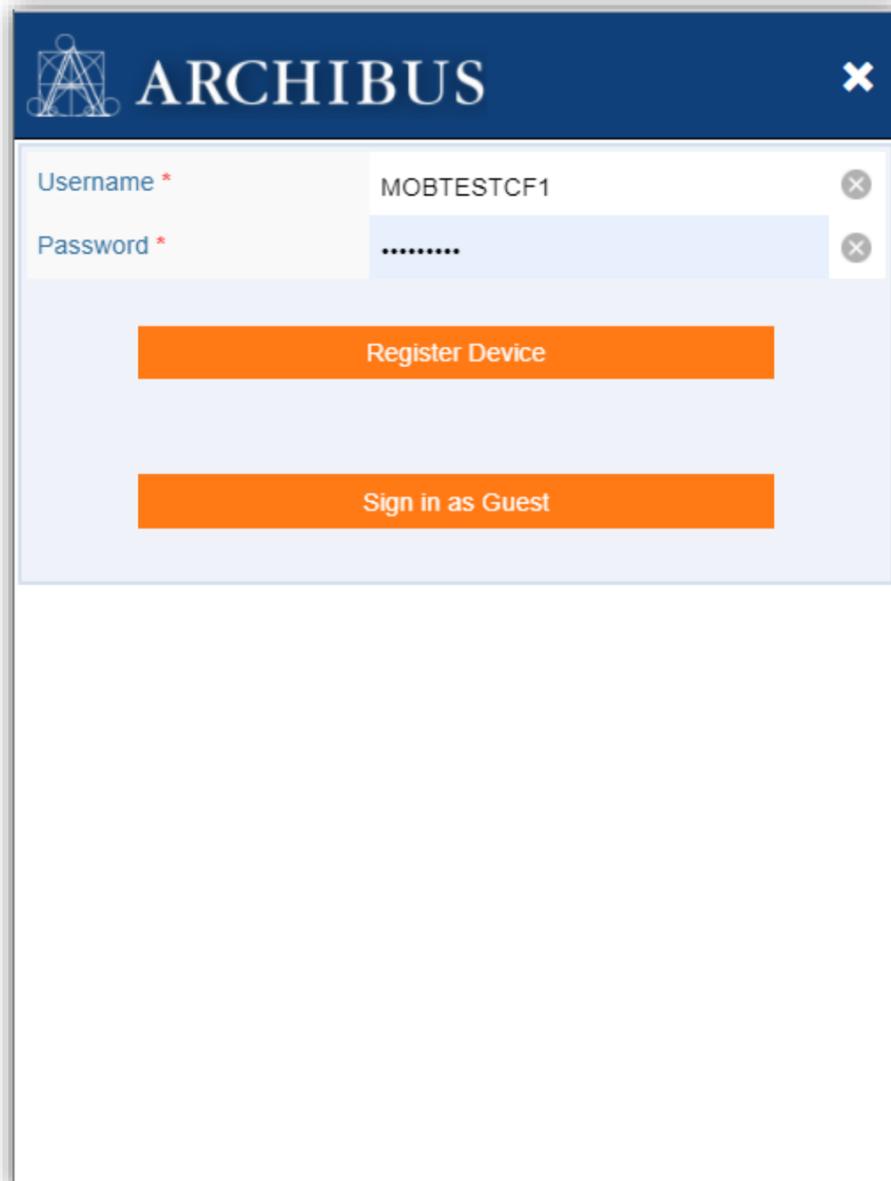
- Apple devices – download from the Apple App Store:
<https://apps.apple.com/au/app/archibus-mobile-client-3-0/id1291897774>
- NOTE: Users should always download version 3 of the app for our current UNSW version of Archibus

Installation

- Archibus Mobile uses standard app installation method for your device
- If requested, allow the application to access camera, location, etc
- When the application is first launched, it will point to a demo address
- Click on the settings button – the cog icon at the top right hand side, then select Web Central URL, & enter one of the following URLs into the text box & press the orange Change Web Central Server URL button:
- Production Server URL: <https://archibus.unsw.edu.au/archibus>
- UAT Server URL: <https://uat23.archibus.unsw.edu.au/archibus> (only use this for testing – you will need a different password to log on to this server – please email ArchibusSupport@unsw.edu.au to get the password)



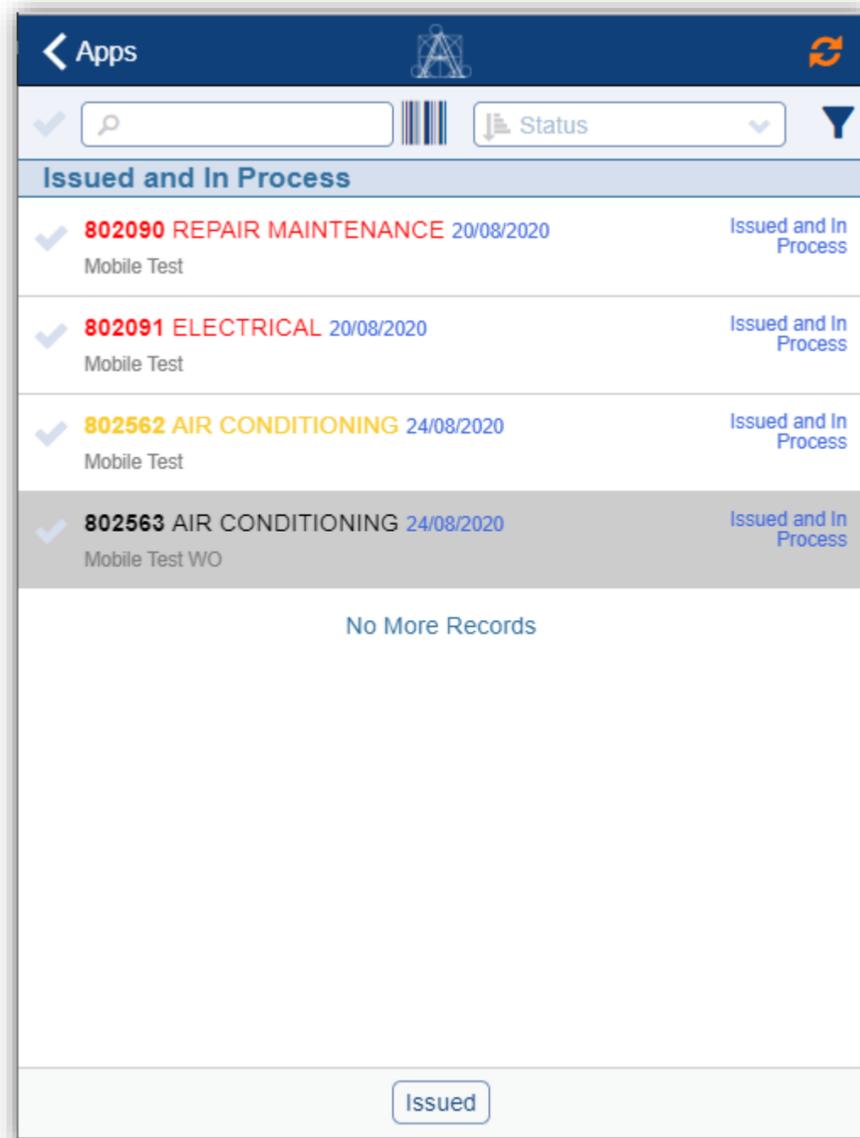
Register Device



The screenshot shows the ARCHIBUS mobile application interface. At the top, there is a dark blue header with the ARCHIBUS logo and name. Below the header, there are two input fields: 'Username *' containing 'MOBTESTCF1' and 'Password *' containing a masked password. Below the fields are two orange buttons: 'Register Device' and 'Sign in as Guest'.

- You will be asked to register the device
- This means you will need to enter your UNSW zID (e.g. z1234567) as the **Username** and your zPass as the **Password**, & then press the **Register Device** button (do not sign in as Guest)
- One zPass can only be registered to one device at any one time
- If more than one person uses a single device (i.e. a shared device), each user will need to log out of the application before the next user can log in to see their work.
- **After you press Register Device, the app will download quite a bit of data (locations, equipment, requests, etc) & this can take a number of minutes, so please be patient.**

Concepts



- UNSW Archibus has 3 types of requests: Service Requests, Work Requests & Work Orders
- Service Requests do not appear in the Archibus Mobile app – only the related Work Request
- Work Requests linked to Work Orders will also appear in the Archibus Mobile app
- Using the current configuration, only one Work Order per Work Request will be displayed in the Archibus Mobile app.
- Users will only see requests for the Primary Trade that they are assigned to in their Craftsperson record
- When a user first connects to the Maintenance application, data will be downloaded from the server. This can take up to about a minute. This allows users to work without requiring internet access.

Synchronise Data



- Whenever data is entered into the mobile device, it remains on that device until the data is synchronised
- Synchronising data uploads data from the device back to Archibus Web Central
- Once data is synchronised, other users of the Archibus application will be able to see the data that had been entered using the Archibus Mobile app.
- Synchronising allows the user to download to their mobile device work requests that have been recently created or updated in Web Central
- A user can synchronise data using the orange refresh button

User Roles: Vendor Supervisor

- Generally has a role of External Trade Supervisor in Archibus (with a Craftsperson record marked Is Supervisor=True)

Tab	Purpose
My Work	Shows any work that is assigned to the supervisor to execute.
My Requests	Supervisors may want to review requests that they have entered, and perhaps edit their initial data. Before they sync the device, they can review the list of work they have requested by choosing My Requests. Once they sync, the sync action uploads these requests to the server for processing by the maintenance system NOTE: As WR cannot be created yet using Mobile App, nothing should appear here until Phase 3 of the Mobile App implementation.
Requested	Shows work that is requested and has been routed to the supervisor for review and approval. The supervisor can approve or reject the work. Since the requestors may not have properly identified the item or entered pertinent details, the supervisor can change the Problem Type, location, equipment code and also enter a priority and comments. NOTE: At UNSW Vendors do not typically approve WRs, but some UNSW Supervisors or WRA trade may need/be-able to use this. Also at UNSW, when a SR is approved, it auto-approves the WR, so this will rarely have records meeting this criteria.
Approved	Shows all work that is approved. From this tab, the supervisor can estimate work (trades, parts and estimated costs), schedule work, assign craftspersons and tools, or forward work to another team. When the craftsperson assignment is complete, the maintenance manager can issue the work.
Issued	From the Issued tab, the supervisor monitors and update work in progress, reassigns work as needed, stops work, places work on hold, and completes work
Completed	Shows work whose status is Completed. From here, the supervisor can enter any remaining data for the work, such as additional labour and parts, costs, or documents. They then choose the Close option to close out (archive) the work.

User Roles: Vendor Craftsperson

- Generally has a role of UNSW Craftsperson in Archibus

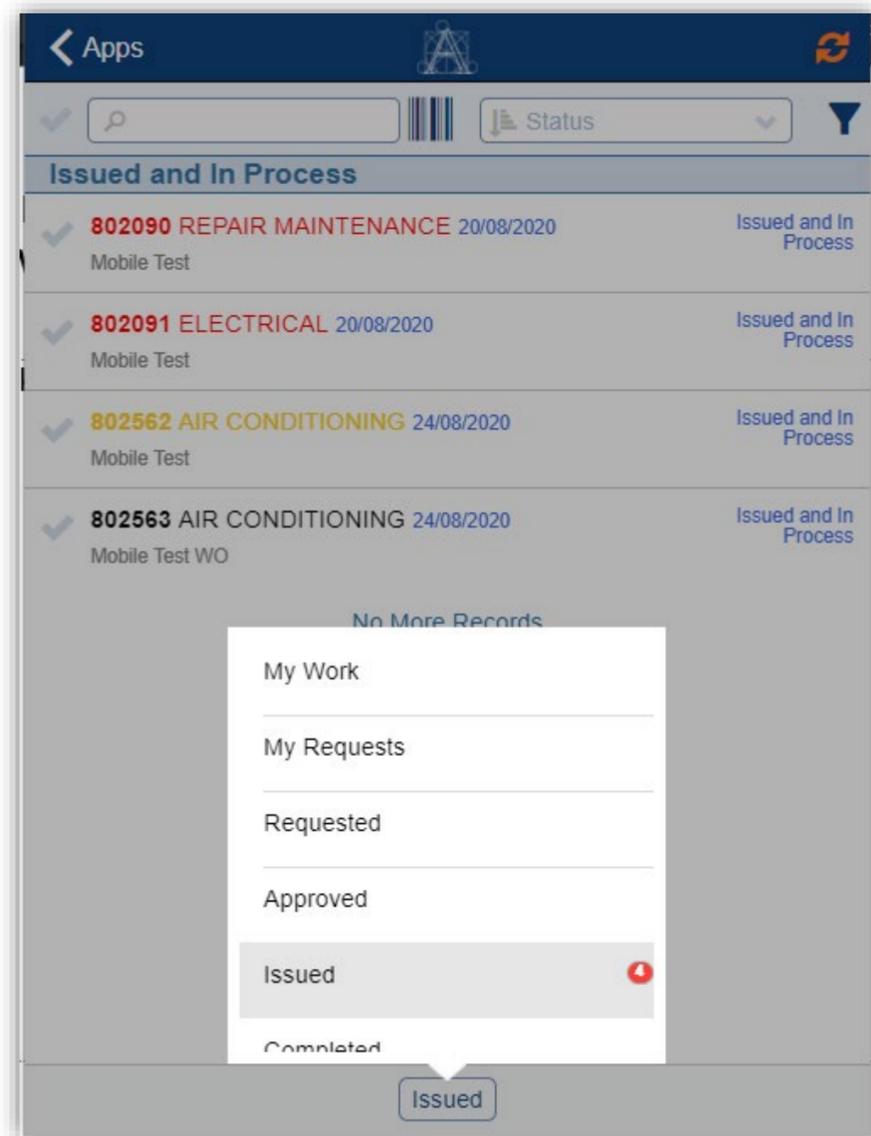
Tab	Purpose
My Work	To view and process the work in their queue. This tab shows work assigned to the craftsperson regardless of its status; that is, this tab will show work that is requested, on hold, issued. It also includes completed work not yet uploaded to the server.
My Requests	To review the work they have requested but have not yet uploaded to the server by syncing. From this tab, they can add further details to their initial request.
Approved	To self-assign work (if the facility manager has established this feature). NOTE: This has not been configured yet in the current version of UNSW Archibus.
Issued	To process work that is issued. This tab shows work assigned to the craftsperson that has a status of "Issued and in Process." The craftsperson can process work from either this tab or from the My Work tab.

User Roles: UNSW Staff

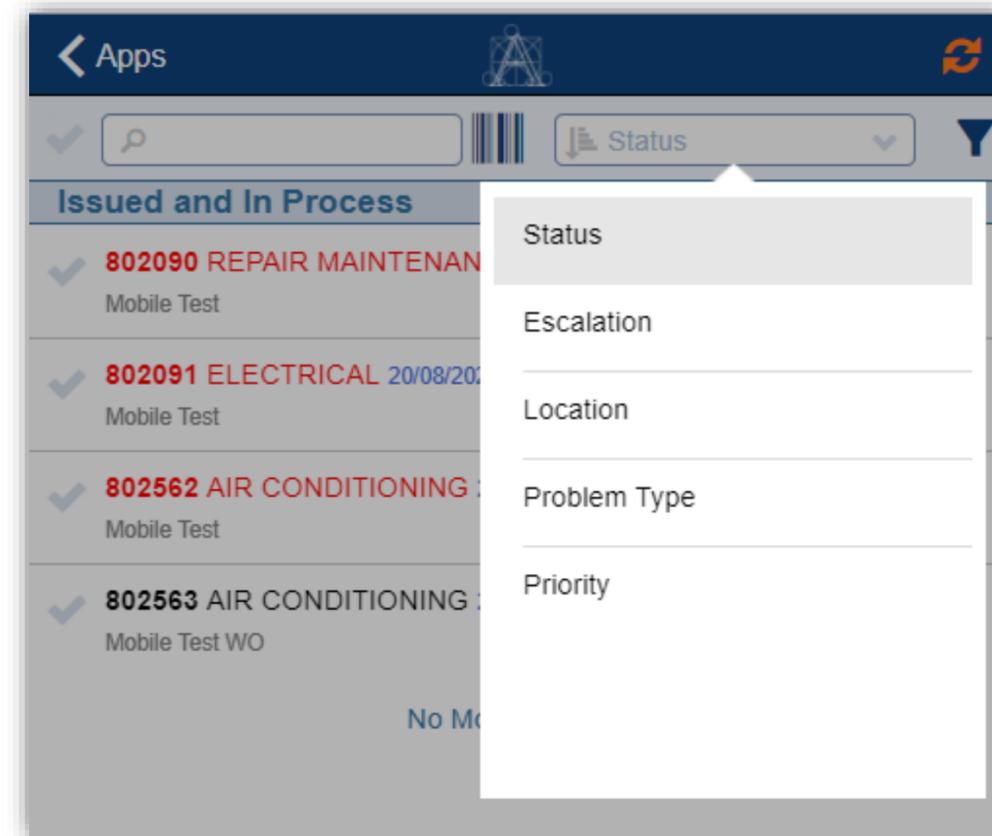
- Generally has a roles of OPS Supervisor, Facility Manager & General Services in Archibus application
- These users will only see My Requests (i.e. Requests assigned to them) if they have no Craftsperson record in Archibus
- If they do have a Craftsperson record (which must be assigned to a Primary Trade), they will only see requests for that Primary Trade (i.e. much like the Vendor Supervisor)

Work Request Functionality:

1. View WRs @ Issued & In Process

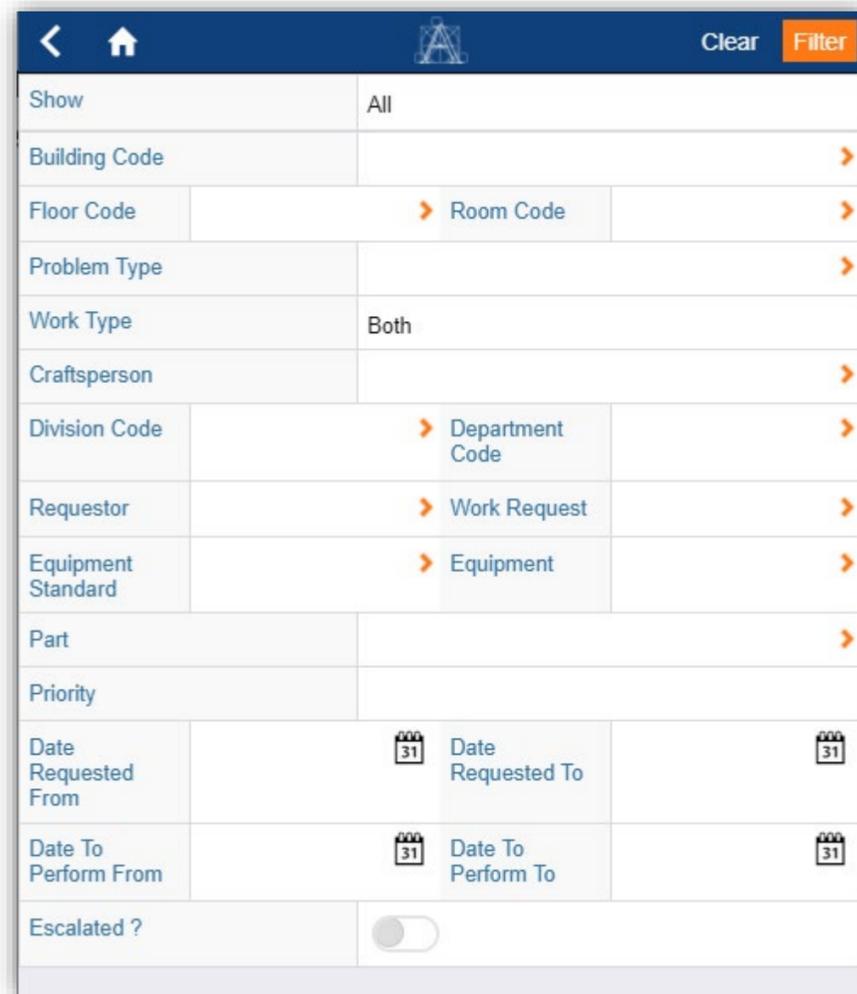


- Clicking the Issued menu option at the bottom of the screen displays requests that have a status of Issued & In Process
- These can then be selected to view the request details
- Sort records by using the dropdown at the top right:



Work Request Functionality:

2. Filtering Work Requests



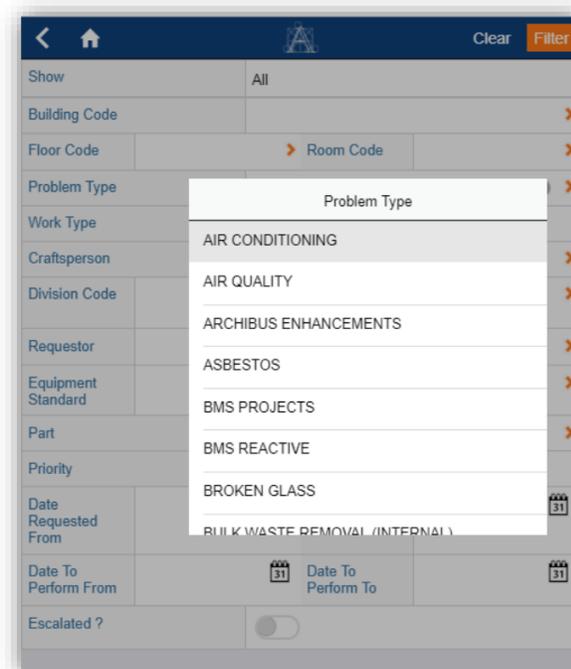
A screenshot of a mobile application interface for filtering work requests. The form is titled 'Show' and 'All' at the top. It contains several filter fields with dropdown arrows on the right:

- Building Code
- Floor Code
- Room Code
- Problem Type
- Work Type (set to 'Both')
- Craftsperson
- Division Code
- Department Code
- Requestor
- Work Request
- Equipment Standard
- Equipment
- Part
- Priority
- Date Requested From (calendar icon)
- Date Requested To (calendar icon)
- Date To Perform From (calendar icon)
- Date To Perform To (calendar icon)
- Escalated? (toggle switch)

- If you need to find a specific request, use the filter icon in any of the request list screens to display the filter options:

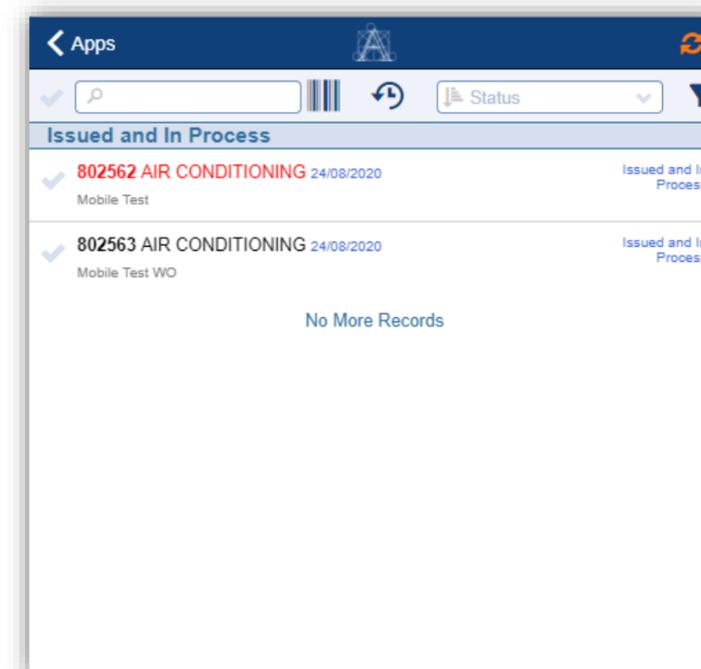


- Enter any search criteria into the filter fields & press the orange Filter button to execute your filtered record search:



A screenshot of the same filter form as above, but with the 'Problem Type' dropdown menu open. The menu lists the following options:

- AIR CONDITIONING
- AIR QUALITY
- ARCHIBUS ENHANCEMENTS
- ASBESTOS
- BMS PROJECTS
- BMS REACTIVE
- BROKEN GLASS
- BULK WASTE REMOVAL (INTERNAL)



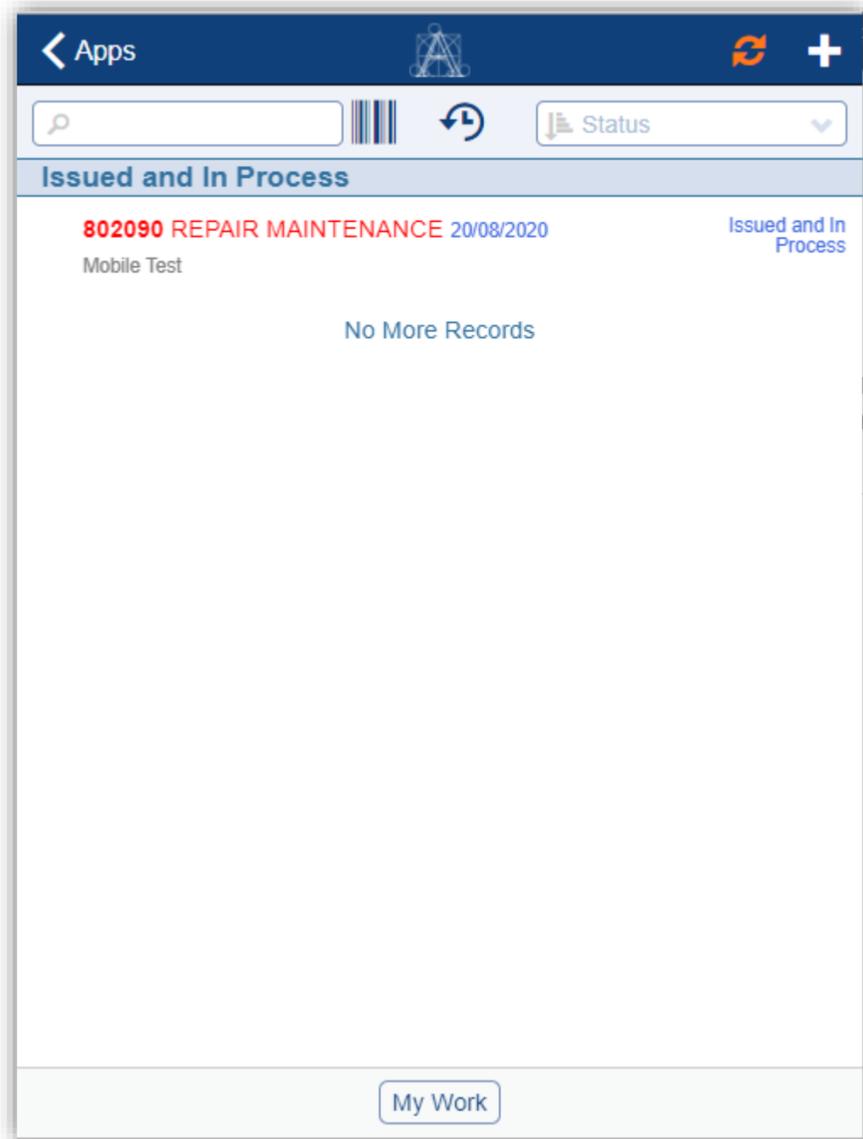
A screenshot of the filtered work request list. The title is 'Issued and In Process'. It shows two records:

- 802562 AIR CONDITIONING 24/08/2020 (Issued and In Process)
- 802563 AIR CONDITIONING 24/08/2020 (Issued and In Process)

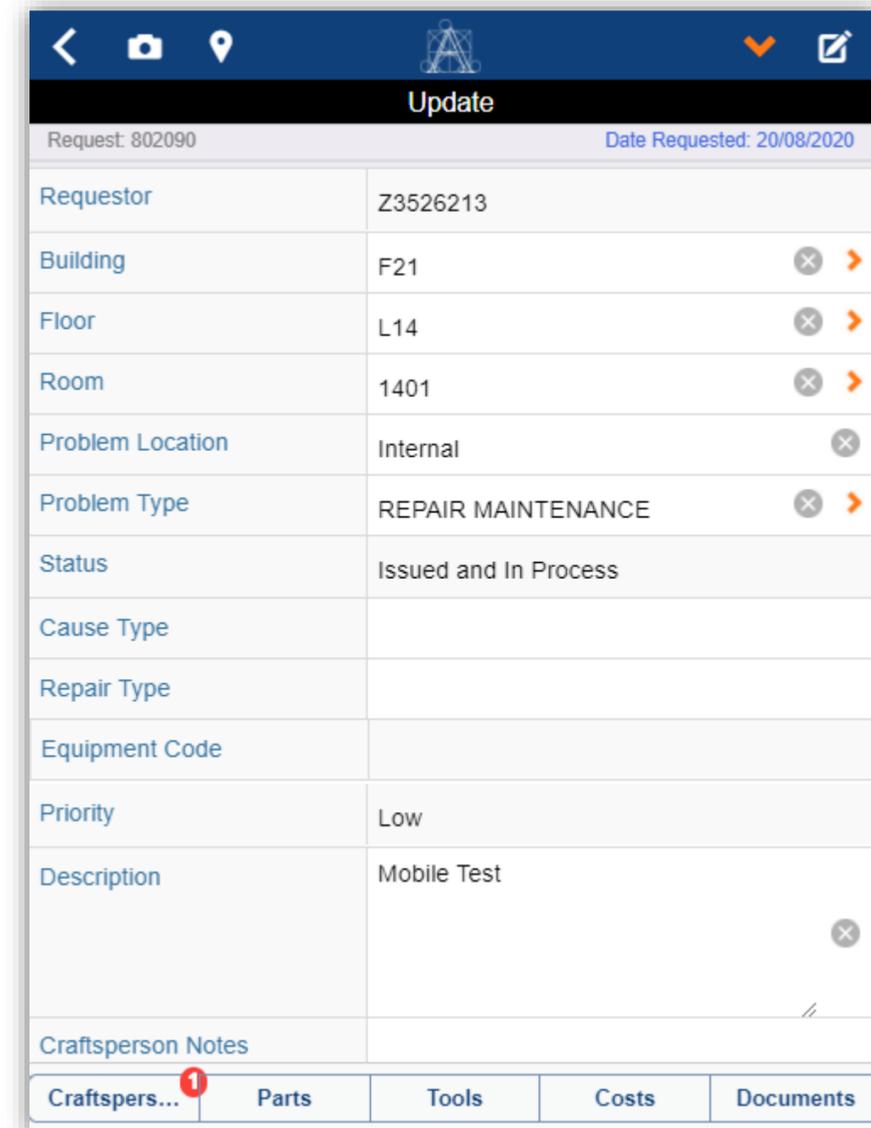
Below the records, it says 'No More Records'.

Work Request Functionality:

3. View WRs Assigned To Me



- Using the My Work option, users can see a list of requests they have been assigned to carry out
- Clicking on the request takes them to the details of that request.



Work Request Functionality:

4. Update WRs Assigned To Me

- Users can update the main details of the request from the main screen, such as Craftsperson Notes field

Request: 802090 Date Requested: 20/08/2020

Requestor	Z3526213
Building	F21
Floor	L14
Room	1401
Problem Location	Internal
Problem Type	REPAIR MAINTENANCE
Status	Issued and In Process
Cause Type	
Repair Type	
Equipment Code	
Priority	Low
Description	Mobile Test
Craftsperson Notes	

Craftspers...¹ Parts Tools Costs Documents Referen

Cancel Apply

Craftsperson Notes

These are some notes about the job I have just worked on.

Request: 802090 Date Requested: 20/08/2020

Requestor	Z3526213
Building	F21
Floor	L14
Room	1401
Problem Location	Internal
Problem Type	REPAIR MAINTENANCE
Status	Issued and In Process
Cause Type	
Repair Type	
Equipment Code	
Priority	Low
Description	Mobile Test
Craftsperson Notes	These are some notes about the job I have just worked on.

Craftspers...¹ Parts Tools Costs Documents Referen

Work Request Functionality:

5. Update Craftsperson Assignment Details

- If a Craftsperson has been assigned to a request, they will have a line at the bottom which they can click on to display their assignment details.

Craftsperson Code	Total Hours	Date Finished	Time Finished	Work Type	Status
MOBTESTCF1	10.00 Hours			UnSpecified	Active

Craftsperson Code	Total Hours	Date Finished	Time Finished	Work Type	Status
MOBTESTCF1	10.00 Hours			UnSpecified	Active

Craftpersons

Assign Craftsperson

Craftsperson Code * MOBTESTCF1

Scheduled

Unscheduled

Actual Hours 0.17

Overtime Hours 0.00

Doubletime Hours 0.00

Date Started 24/08/2020

Time Started 10:40

Date Finished 24/08/2020

Time Finished 10:50

Work Type UnSpecified

Status Active

Comments Finished the job

Craftsperson Code	Total Hours	Date Finished	Time Finished	Work Type	Status
MOBTESTCF1	10.00 Hours			UnSpecified	Active

- From there they can enter details of their assignment
- For example, they can also specify the different work types:

Craftpersons

Assign Craftsperson

Craftsperson Code * MOBTESTCF1

Scheduled

Unscheduled

Actual Hours 0.17

Overtime Hours 0.00

Doubletime Hours 0.00

Date Started 24/08/2020

Time Started 10:40

Date Finished 24/08/2020

Time Finished 10:50

Work Type UnSpecified

Status Active

Comments Finished the job

UnSpecified

Work

Material Pickup

Job Setup or Prep.

Travel Time

Wait for Security

Wait for Client

Craftsperson Code	Total Hours	Date Finished	Time Finished	Work Type	Status
MOBTESTCF1	10.00 Hours			UnSpecified	Active

Work Request Functionality:

6. Saving Craftsperson Assignment Changes

Assign Craftsperson

Craftsperson Code * MOBTESTCF1

Scheduled

Unscheduled

Actual Hours 0.17

Overtime Hours 0.00

Doubletime Hours 0.00

Date Started 24/08/2020

Time Started 10:40

Date Finished 24/08/2020

Time Finished 10:50

Work Type Work

Status Active

Comments Finished the job

Craftspersons

Craftsperson Code	Total Hours	Date Finished	Time Finished	Work Type	Status
MOBTESTCF	10.00 Hours			UnSpecified	Active

- Once details are entered, the user clicks the orange tick at the top right:



- NOTE: It may seem that nothing has happened, but you will noticed that the details are saved in the line at the bottom of the screen

Craftsperson Code	Total Hours	Date Finished	Time Finished	Work Type	Status
MOBTESTCF	10.17 Hours	24/08/2020	10:50	Work	Active

Work Request Functionality:

7. Assign A Craftsperson To A Request (Supervisor Only)

- For a Supervisor to assign a Craftsperson to a request, go to the Update screen of the request, & then click on the Craftsperson button in the menu bar at the bottom of the screen, which will take you to the Assign Craftsperson screen:

Request: 802090 Date Requested: 20/08/2020

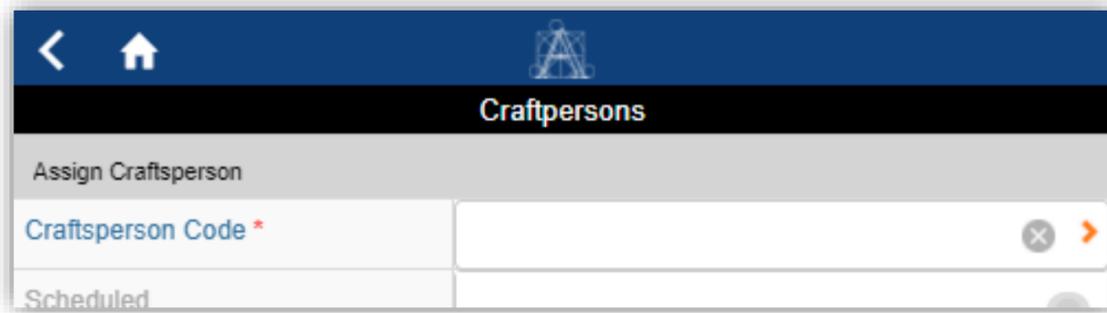
Requestor	Z3526213
Building	F21
Floor	L14
Room	1401
Problem Location	Internal
Problem Type	REPAIR MAINTENANCE
Status	Issued and In Process
Equipment Code	
Priority	Low
Description	Mobile Test
Craftsperson Notes	These are some notes about the job I have just worked on.
Related Requests	

Menu bar: Craftspers... (1), Parts, Tools, Costs, Documents, References

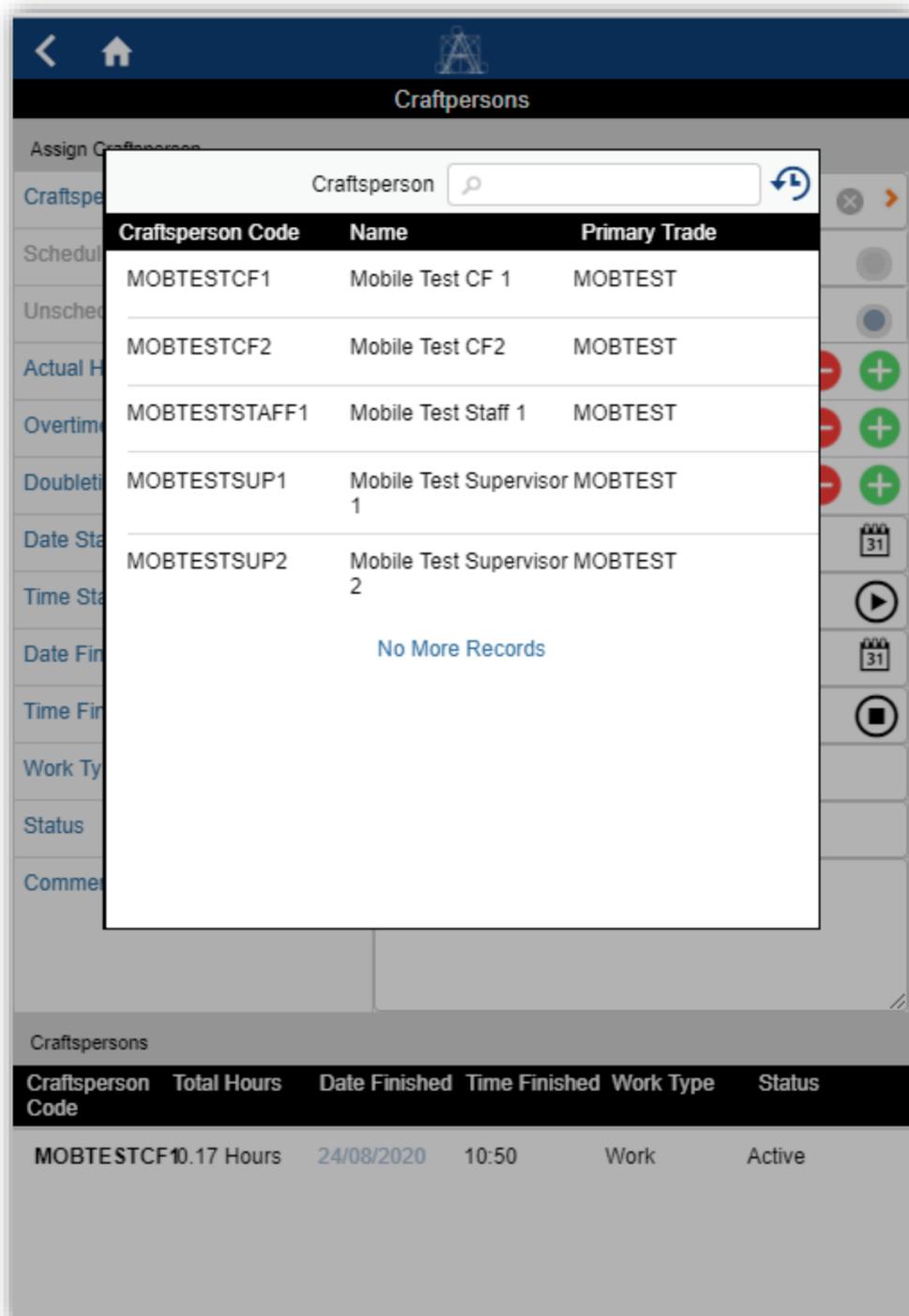
Assign Craftsperson

Craftsperson Code *	
Scheduled	<input type="checkbox"/>
Unscheduled	<input checked="" type="checkbox"/>
Scheduled Hours	0.00
Actual Hours	0.00
Overtime Hours	0.00
Doubletime Hours	0.00
Date Started	
Time Started	
Date Finished	
Time Finished	
Work Type	UnSpecified
Status	Active
Comments	

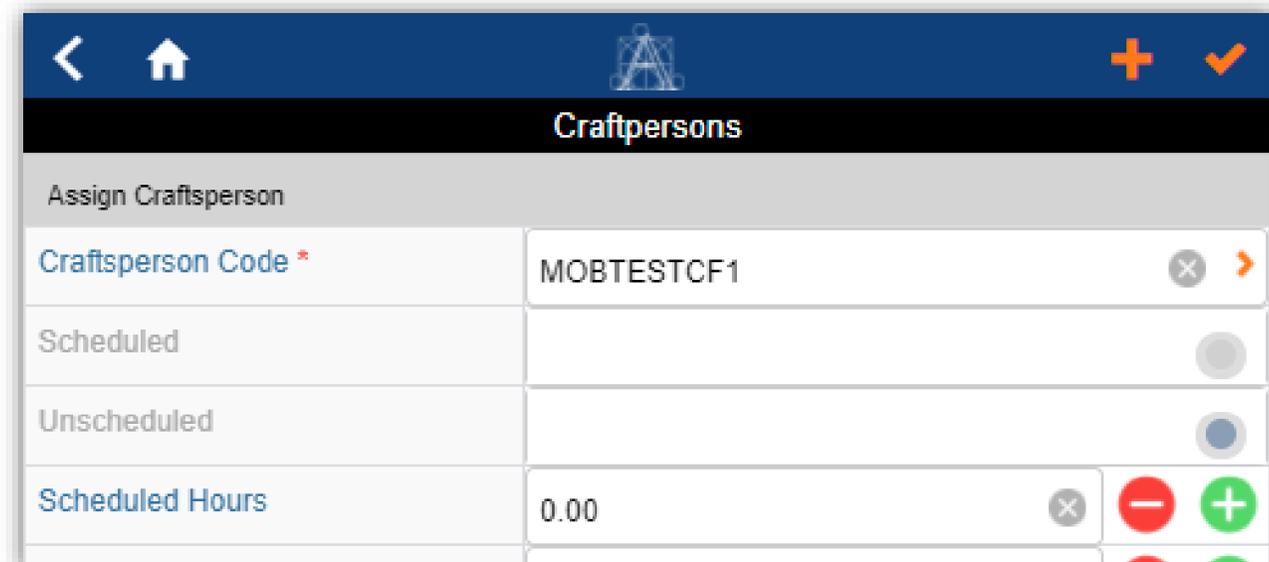
Craftsperson Code	Total Hours	Date Finished	Time Finished	Work Type	Status
MOBTESTCF0	17 Hours	24/08/2020	10:50	Work	Active



- Click in the Craftsperson Code field (see left)



- This will display a select box showing all Craftspersons that belong to the logged in user's Primary Trade
- Clicking one of the Craftsperson records in the list will select that person
- NOTE: A Craftsperson cannot assign themselves to a request.
- Click the orange Tick icon to save the Craftsperson Assignment



Craftpersons

Assign Craftsperson

Craftsperson Code *

Scheduled

Unscheduled

Scheduled Hours 0.00

Actual Hours 0.00

Overtime Hours 0.00

Doubletime Hours 0.00

Date Started

Time Started

Date Finished

Time Finished

Work Type UnSpecified

Status Active

Comments

Craftpersons

Craftsperson Code	Total Hours	Date Finished	Time Finished	Work Type	Status
MOBTESTCF10	17 Hours	24/08/2020	10:50	Work	Active
MOBTESTCF10	00 Hours			UnSpecified	Active

- The new Craftsperson Assignment will be visible at the bottom of the Assign Craftsperson screen:

Craftsperson Code	Total Hours	Date Finished	Time Finished	Work Type	Status
MOBTESTCF10	17 Hours	24/08/2020	10:50	Work	Active
MOBTESTCF10	00 Hours			UnSpecified	Active

Work Request Functionality:

8. Add Costs To A Request

Costs

Add Other Cost

Other Resource Type * Contractor Cost

Other Resource Description

Quantity Used 0.00

Units

Estimated Cost 0.00

Actual Cost 0.00

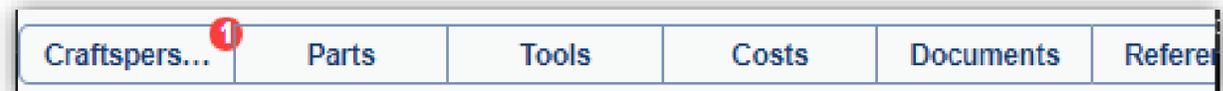
Other Costs

Other Resource Type	Quantity Used	Units	Actual Cost
Tap + to add new costs			

Summary of Actual Costs

Cost of Labor	0.00
Cost of Parts	0.00
Other Costs	0.00
Total Cost	0.00

- To add Other Costs to a request, go to the Update screen of the request, & then click on the **Costs** button in the menu bar at the bottom of the screen, which will take you to the *Add Other Cost* screen:



- Select the Resource Type, enter the cost values & click the orange Tick icon to save the **Costs** entry:

Costs

Add Other Cost

Other Resource Type * Contractor Cost

Other Resource Description

Quantity Used 0.00

Units

Estimated Cost 0.00

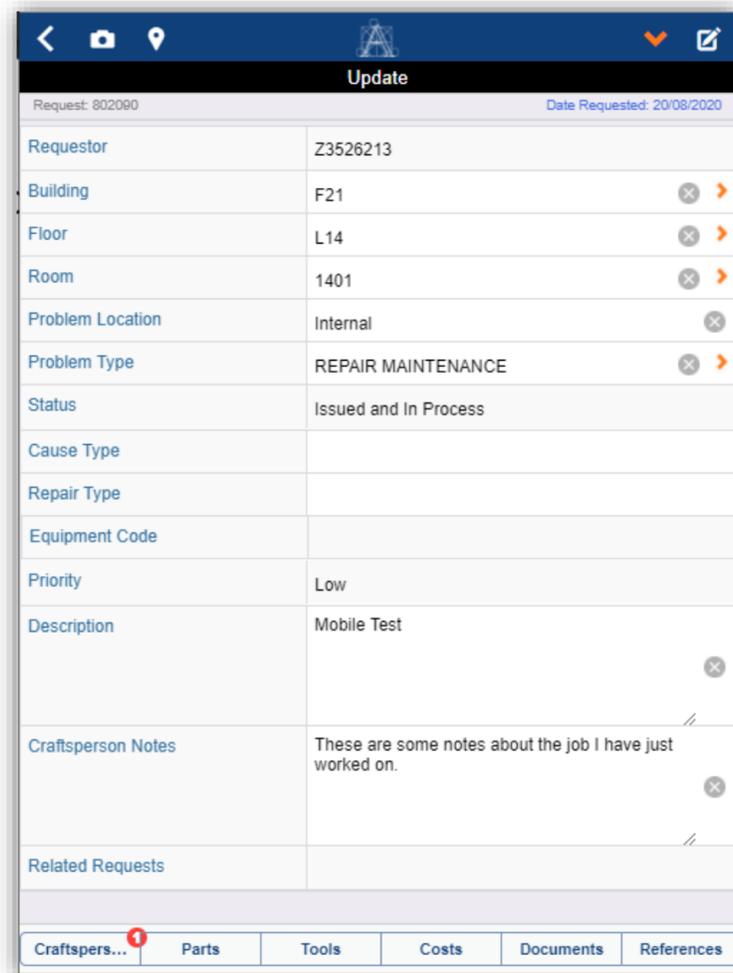
Actual Cost 0.00

Other Costs

Other Resource Type	Quantity Used	Units	Actual Cost
Tap + to add new costs			

Work Request Functionality:

9. Add Photographs To Work Request

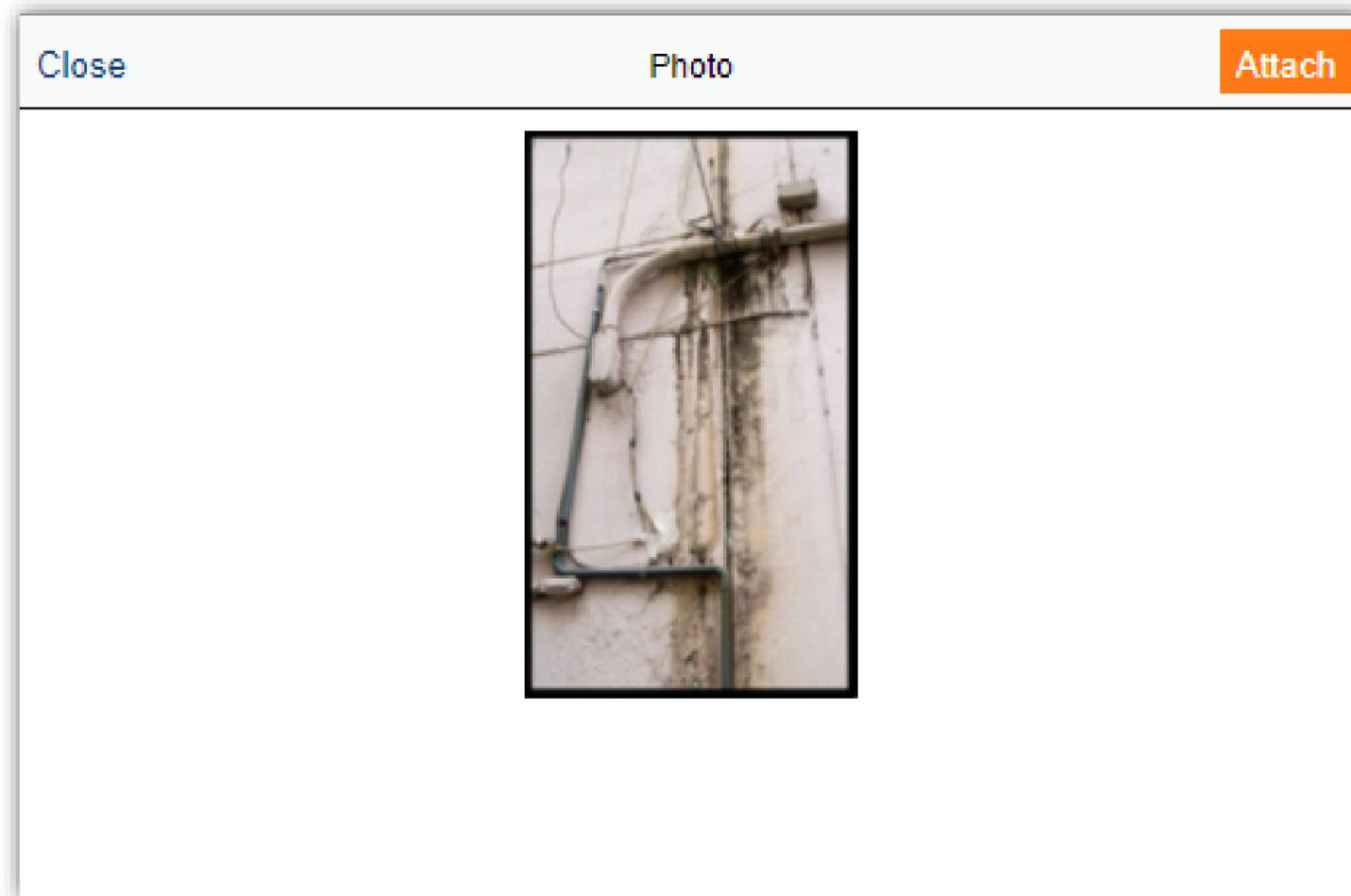


A screenshot of a mobile application interface for a work request. The form is titled "Update" and shows details for request 802090, dated 20/08/2020. The form fields include:

Requestor	Z3526213
Building	F21
Floor	L14
Room	1401
Problem Location	Internal
Problem Type	REPAIR MAINTENANCE
Status	Issued and In Process
Cause Type	
Repair Type	
Equipment Code	
Priority	Low
Description	Mobile Test
Craftsperson Notes	These are some notes about the job I have just worked on.
Related Requests	

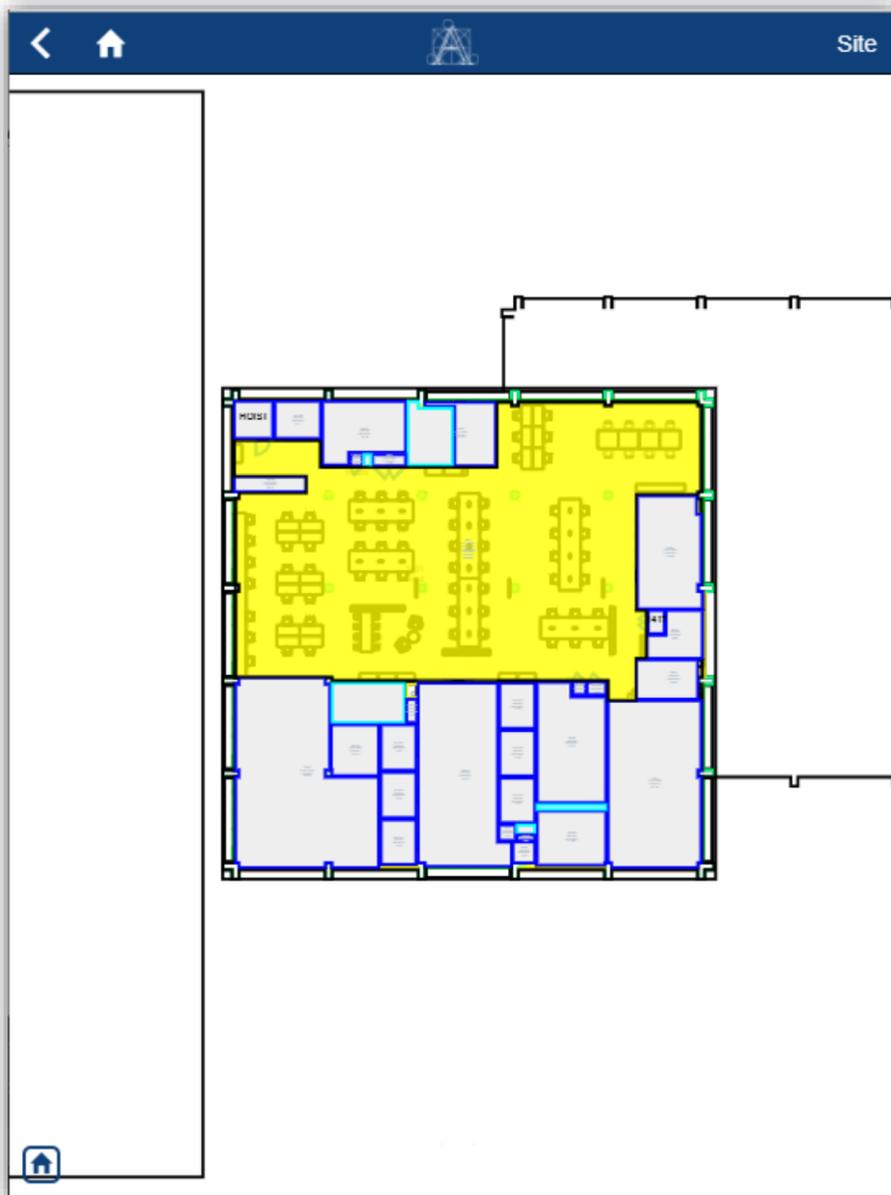
At the bottom, there are tabs for "Craftspers...", "Parts", "Tools", "Costs", "Documents", and "References".

- Clicking on the photo icon allows the user to use the device camera to attach a photo to the request



Work Request Functionality:

10. View Work Request Location



- Click the Map icon to view the floor drawing of the Work Request location:



- Users can zoom in or out to look at the detail of the floor where the Work Request Location has been specified.

Work Request Functionality:

11. Complete Craftsperson Assignments From Assign Craftsperson Screen

- If a user is in the **Assign Craftsperson** screen & changes the value of the Status field to “Complete” and presses the orange Tick icon, this will only complete the Craftsperson Assignment – it will not change the status of the Work Request to Complete

The screenshot shows the 'Assign Craftsperson' screen. The 'Status' field is currently set to 'Active'. A dropdown menu is open, showing 'Active' and 'Complete' as options. The 'Actual Hours' field is 0.17, and the 'Comments' field contains 'Finished the job'. The bottom table shows the current assignment for Craftsperson MOBTESTCF1 with a status of 'Active'.

Craftsperson Code	Total Hours	Date Finished	Time Finished	Work Type	Status
MOBTESTCF1	0.17 Hours	24/08/2020	10:50	Work	Active

This screenshot shows the 'Assign Craftsperson' screen after the status has been changed to 'Complete'. The 'Status' field now displays 'Complete'. The 'Actual Hours' field is 0.17, and the 'Comments' field contains 'Finished the job'. The bottom table shows the current assignment for Craftsperson MOBTESTCF1 with a status of 'Complete'.

Craftsperson Code	Total Hours	Date Finished	Time Finished	Work Type	Status
MOBTESTCF1	0.17 Hours	24/08/2020	10:50	Work	Complete

The screenshot shows the 'Update' screen for a work request. The 'Request' is 802090, and the 'Date Requested' is 20/08/2020. The 'Requestor' is Z3526213. The 'Building' is F21, 'Floor' is L14, and 'Room' is 1401. The 'Problem Location' is Internal, and the 'Problem Type' is REPAIR MAINTENANCE. The 'Status' is 'Issued and In Process'. The 'Cause Type' is empty, and the 'Repair Type' is empty. The 'Equipment Code' is empty, and the 'Priority' is Low. The 'Description' is 'Mobile Test'. The 'Craftsperson Notes' field contains 'These are some notes about the job I have just worked on.' The bottom navigation bar shows 'Craftspers...', 'Parts', 'Tools', 'Costs', 'Documents', and 'References'.

Work Request Functionality:

12. Return Requests From Update Screen

Update	
Requestor	Z3501964
Building	B5
Floor	G
Room	P10
Problem Location	Internal
Problem Type	PLUMBING
Status	Issued and In Process
Equipment Code	
Priority	Low
Description	Trisley pool equipment planned maintenance for March 2020
Craftsperson Notes	
Related Requests	

- From the Update screen, a Vendor Supervisor can “Return” the request to a previous step in the workflow
- For non-billable requests, an Issued request can only go back to be Approved or Rejected:

Return Work Request	
Approved	✓
Rejected	

- A Rejected request goes back to the requestor for resubmission
- If the device has wi-fi/mobile-data connection, it will list all available previous steps
- If the device has no wi-fi/mobile-data connection, it will advise the user that it can only go back one step to the last status.
- See [here for more details](#)

Work Request Functionality:

13. Forward Requests From Update Screen

Request: 750507

Requestor: Z3501964

Building: B5

Floor: G

Room: P10

Problem Location: Internal

Problem Type: PLUMBING

Status: Issued and In Process

Equipment Code: [x] [>]

Priority: Low

Description: Trisley pool equipment planned maintenance for March 2020 [x]

Craftsperson Notes

Related Requests

Craftspers... Parts Tools Costs Documents References

- From the Update screen, a Vendor Supervisor can “Forward” the request to another Supervisor or Work Team (though we only use Supervisors)

Forward

Supervisor: Z3109795 [x] [>]

Work Team Code: [x] [>]

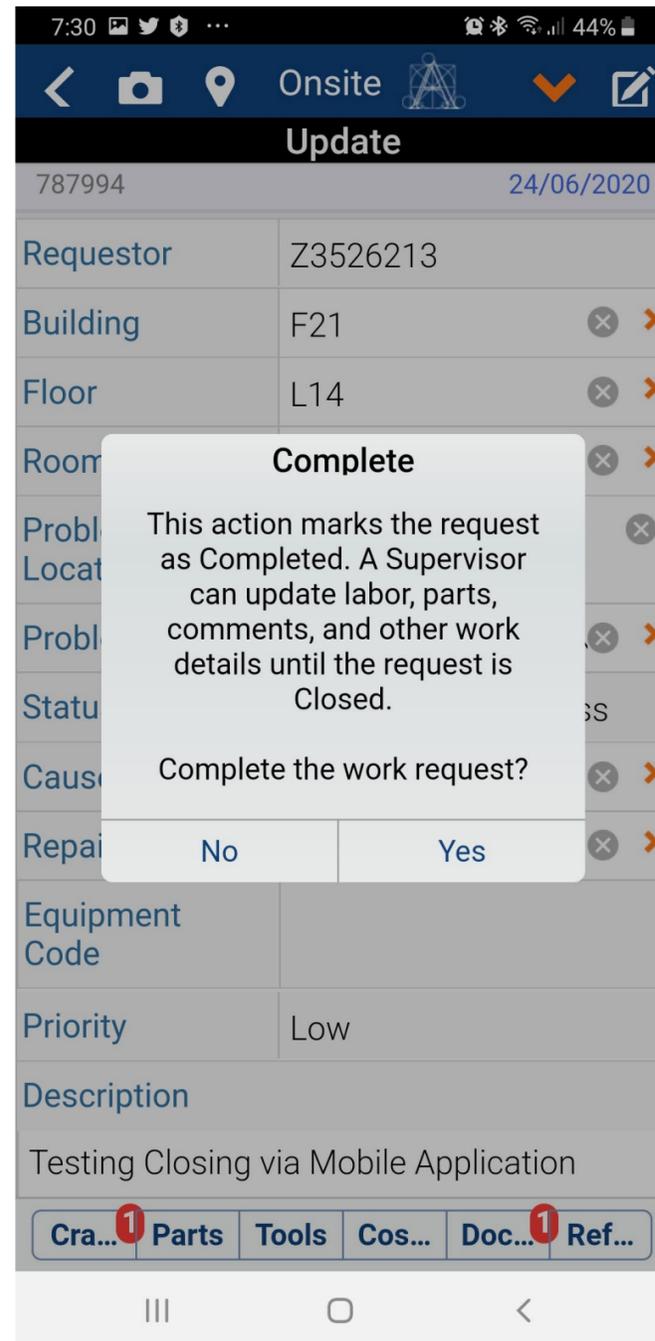
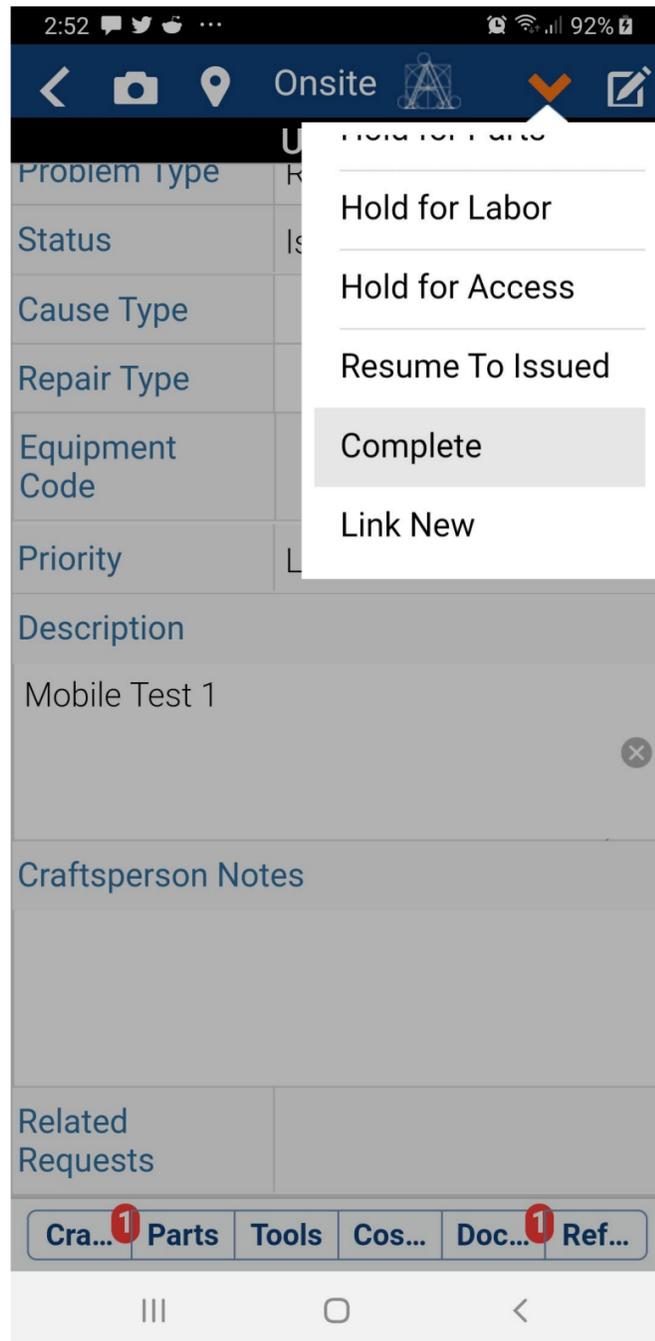
Comments: I am forwarding this to you [x]

Request: 750507 Date Requested: 01/23/2020

- A Forwarded request goes to the new Supervisors list of Assigned requests
- See [here for more details](#)

Work Request Functionality:

14. Complete Requests From Update Screen



- Users can use the orange arrow at the top right hand corner to update the Status of the request from the main screen.
- Marking the Work Request as Complete via the Archibus Mobile app just changes the status of the job:
 - It DOES NOT mark it as “Ready For Payment”
 - It DOES NOT Close the request.
- *NOTE: Selecting one of the On Hold options will place the request on hold for 7 days (you cannot enter a date via the mobile app). This can be modified via Web Central if this date is not correct.*



THE END.

THANK YOU!