

Campus Assist

User Guide:

Work Request Management



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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.

 ${f Roles}$ – 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.



2. 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).

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



		 Update WR with status
COS Invoice Approver	Staff	Approve or Dispute WRs for payment
COS Financial/Hub	Staff	Generate Invoice Certificates Close WR

2.2. Terminology



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

Phrase	Description	
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 	



	 procedures for notifying various staff, including the requestor, on the status of the request
Work Team	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.
Trade	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.
Craftsperson	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.
Parts	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.
Other Costs	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.
Estimate Costs	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.
Actual Costs	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.



Chargeable Costs	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.
Cost Types	Determines how costs are calculated and what data will be included in calculating total billable cost.
Cost Type – Schedule of Rates by Role	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.
Cost Type – Schedule of Rates by Human	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.
Cost Type – Target Cost Estimate	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.
Cost Type – Quoted	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.
Cost Type – PPM Cost	This is the same as Quote in terms of calculation. This however will only be used for PM Work Requests.
Cost Type – Nil Cost	Regardless of what information is entered into the Estimate or Actual cost fields, \$0 cost will be calculated for this Work Request.
Status	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.
Status – Requested	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.
Status - Rejected	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.



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.	



Save - Location	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.
Due Date	The Due Date is derived from the Priority level selected and the corresponding SLAs for that particular Problem Type.
Bulk Actions	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.
Soft Services	A COS service line that incorporates services such as Cleaning and Waste Removal.
Hard Services	A COS service line that incorporates typical maintenance services such as Electrical, Mechanical, Fire, Plumbing etc.
Security Services	A COS service line that provides services such as patrol, guarding, keys, electronic locks etc.



2.3. Cost Types

lil Costs Description	Regardless of what information is entered into the Estimate or Actual cost fields, \$0 cost will be calculated for this Work Request.		
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	\$0.00		
	Labour costs are driven from charged at a \$0 value.	n the craftspersons but will be	
Problem Types	AUTO DOORS	LIGHTING	
	BLDG ACCESSCARDS	LINEN	
	BUILDING	LOCKSMITHING	
	CAMPUS ASSIST	LOCKSMITHING KEYS	
	CLEANING GENERAL	LOCKSMITHING LOCKS	
	CONFIDENTIAL WASTE	MECHANICAL SERVICES	
	CRANES AND HOISTS	PEST CONTROL SERVICES	
	DECONTAMINATION	PLUMBING SERVICES	
	ELECTRICAL SERVICES	ROOF AND GUTTER	
	ELECTRONIC AUTO	ROOF SAFETYSECURITY SERVICES	
	DOORS	including secondary problem types	
	ELECTRONIC SECURITY	SIGNAGE	
	EMERGENCY AND EXIT LIGHTING	STORES AND DOCK	
	FIRE SERVICES	TEST AND TAG	
	GROUNDS including	WASTE BIOLOGICAL AND	
	secondary problem types	CLINICAL	
	FUME CUPBOARD	WASTE GENERAL	
	HAZARDOUS CHEMICAL WASTE	WATER TREATMENT	
		TEST AND TAG	
	LAUNDRY	ILJI AND IAG	
		TRAFFIC AND PARKING including	

Schedule of Rates by Human

Description	This is required when the works completed will be charged based on the person doing this work.
	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	AUTO DOORS	LAUNDRY				
	BUILDING	LIFT SERVICES				
	CLEANING GENERAL	LIGHTING				
	CONFIDENTIAL WASTE	LINEN				
	CRANES AND HOISTS	LOCKSMITHING including				
		secondary problem types				
	DECONTAMINATION	MECHANICAL SERVICES				
	ELECTRICAL SERVICES	PEST CONTROL SERVICES				
	ELECTRONIC AUTO	PLUMBING SERVICES				
	DOORS					
	ELECTRONIC SECURITY	ROOF AND GUTTER				
	EMERGENCY AND EXIT	ROOF SAFETY				
	FIRE SERVICES	STORES AND DOCK				
	FUME CUPBOARD	TEST AND TAG				
	GROUND including secondary problem types	WASTE GENERAL				
	HAZARDOUS CHEMICAL WASTE	WATER TREATMENT				

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	contractor may advise that the senior technician, but ends of ta	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	This matches the Actual Cost Labour costs are driven from the craftspersons.				
Problem Types	CONFIDENTIAL WASTE	LIGHTING				
	CRANES AND HOISTS	LINEN				
	DECONTAMINATION	LOCKSMITHING				
	ELECTRICAL SERVICES	LOCKSMITHING KEYS				
	ELECTRONIC AUTO DOORS	LOCKSMITHING LOCKS				
	ELECTRONIC SECURITY	MECHANICAL SERVICES				



EMERGENCY AND EXIT LIGHTING	PEST CONTROL SERVICES
FIRE SERVICES	PLUMBING SERVICES
FUME CUPBOARD	ROOF AND GUTTER
GROUNDS EXTERNAL SIGNAGE	ROOF SAFETY
GROUNDS IRRIGATION	STORES AND DOCK
GROUNDS LINE MARKING	TEST AND TAG
HAZARDOUS CHEMICAL	WASTE BIOLOGICAL AND
WASTE	CLINICAL
LAUNDRY	WASTE GENERAL
LIFT SERVICES	WATER TREATMENT



Quoted

Description	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.				
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	e estimated trades.			
Problem Type	CLEANING GENERAL	LIGHTING			
<i>,</i> .	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	TEST AND TAG			
	GROUNDS LINE MARKING	TRAFFIC AND			
		PARKING SIGNAGE			
	HAZARDOUS CHEMICAL	WASTE BIOLOGICAL AND			
	WASTE	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					
		m. A person may be qualified to				
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 HAZARDOUS CHEMICAL WASTE	PM GENERAL CLEANING PM LINEN				
	PM PEST CONTROL SERVICES	PM SECURITY SERVICES				
	PM TRAFFIC AND PARKING	PM WASTE BIOLOGICAL AND CLINICAL				
	PM WASTE GENERAL	SECURITY SERVICES				
	SECURITY	SECURITY				
	SECURITY SERVICES LOCK UNLOCK	SECURITY SERVICES OUT OF HOURS				
	SECURITY SERVICES PATROL SERVICE	SECURITY SERVICES TRAFFIC CTRL				
	TRAFFIC AND PARKING	TRAFFIC AND PARKING BARRICADING				
	TRAFFIC AND PARKINGJENQUIRY	TRAFFIC AND PARKING SIGNAGE				
	TRAFFIC AND PARKING VIP EVENT					



PPM

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	Labour costs are driven from the estimated trades.					
Problem Types	PM AUTOMATIC DOORS	PM MDI LAB SERVICES					
	PM BUILDING						
	MANAGEMENT SYSTEM	PM MECHANICAL SERVICE					
	PM CRANES AND HOISTS	PM OPEN SPACES					
	PM ELECTRICAL						
	SERVICES	PM PLUMBING SERVICES					
	PM EMERGENCY AND						
	EXIT LIGHTING	PM ROOF AND GUTTER					
	PM FIRE	PM ROOF SAFETY					
	PM FUME CUPBOARD	PM SANITARY SERVICES					
	PM LIFT SERVICES	PM SECURITY ADMIN					
	PM LIGHTING	PM TEST AND TAG					
	PM LINE MARKING	PM WATER TREATMENT					



3. Navigation



Understand standard system navigation features.

3.1. Login

Campus Assist is accessible from the Staff Intranet (<u>https://intranet.sydney.edu.au</u>). 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 **<u>Shared Services</u>** for support.

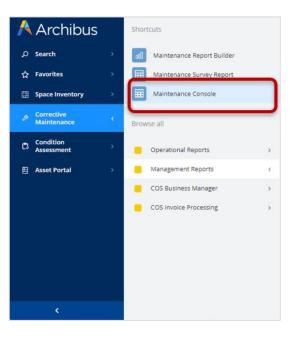
3.2. Navigating the Task Menu

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

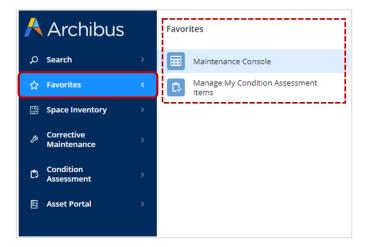
The Search menu item allows for keyword search across the entire platform, spanning modules, reports, screens, and objects (data). The results and your access to them will be determined by your system role and permissions.



	Archibus		Search
Q	Search	>	O manage 🗙 🗙
☆	Favorites		
H	Space Inventory		Diamage Condition Assessment Items
F9	Corrective Maintenance		Manage My Condition Assessment Items
			Manage Unsubmitted Requests
Ċ	Condition Assessment		Manage Asset & Equipment Surveys
	Asset Portal		How to create and <u>manage</u> a Work Request

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.

BB Maintenance Console				Remove from Favourites
Q Search by code, type, procedure, equipment, description, location, person	Quick Filters 🗸 🔀 Filters	Refresh Clear	Group by: Status 🗸	



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.

4. Maintenance Console (Prev. Building Operations)

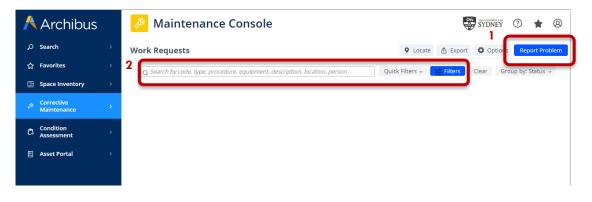
The Maintenance Console facilitates the submission and subsequent management of your Work Requests.

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.

😕 Maintenance Console							Ę	SYDNEY	⊘ ★ 0
Work Requests						9 L	ocate 👌 Export	Ø Options	Report Proble
Q Elevator	X Quick Filters V	Filters Clear	Group by: Status 👻						
Work Request	© Work Description Comments	÷ Priority	© Location (Name)	0	Equipment Code Equipment Standard	0	Date to Perform Due Date	0	Assigned to Work Team
Requested (2) >									
Approved (1) >									
□ Issued and In Process (9) >									

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.

🤌 Maintenance Console								
Work Requests - %ELEVATOR%								
	ک Elevator	×	Quick Filters 🗸 🚘 Filters Clear Group by: S	Status 🗸				
	Work Request Actions Problem Ty PM Procedu	pe ire [‡]	✓ All Escalated	Priority				
	Requested (2) >		My Requests					
	Approved (1) > Requests Requiring My Endorsement Requests Requiring My Approval							
	Issued and In Process (9) >		Requests Requiring My Estimation					
	Stopped (5) >		Requests Requiring My Scheduling Requests Requiring My Verification					
	Completed (7) >		My Approved Requests					
	Closed (71) >		Unassigned Requests					
			10 Newest Requests					
			10 Oldest Requests					
			10 Nearing Escalation					
			Requests with Pending Steps					

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**.

Aintenance Console	😴 sydney 🕐 🌟 🚇
Work Requests	Filters Clear Cancel
🗙 Search by code, type, procedure, equipment, description, location, person Quick Filters a search by code, type, procedure, equipment, description, location, person	✓ General
	Work Type Both • Work Request Type Problem Type Priority Work Request Code Work Order Code Service Request ID Account Code Cost Type Safety Safety Safety Severe Weather impact
	> Equipment & PM Details
	> Location & Organization
	> People

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.

🤌 Maintenance Console				
Work Requests				
Q Search by code, type, procedure, equipment, description, location, person	Quick Filters v	🗩 Filters	Clear	Group by: Status Site Building Problem Type Craftsperson Work Order Work Team None



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.

Work Requests - My Requests				🕈 Locate	🛱 Options	Report Problem
Q Search by code, type, procedure, equipment, descri	ption, location, person Qui	ick Filters 🗸 🧰 Filters Clear	Group by: Status 👻			
Work Request 😄		Work Description Comments	Priority Location (Name)		ate to Perform 😄	Assigned to Work Team
Rejected (20) >	(,,			 		
Requested (3) ~	Vorl	k Request 🤤 🧍	Actions	\$ Problem Ty PM Proced		\$

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.

_	_								
P	Maintenance Console							SYDNEY (2 🛊 🛛
Wo	ork Requests - My Requests								Report Problem
	Q Search by code, type, procedure, equipment, de	scription, location, person	Quick Filters 🗸 📑 Filters	Clear Group by: Status ~				ighlight escalated requests elect Work Request Fields	
	Work Request 👙	Problem Type PM Procedure	Work Description Comments	≎ Priority Lo	ocation (Name)		Equipment S	now/Hide Work Request Action	ns and Details
	Rejected (20) >								
	Requested (3) ~								
	6122014 🛞 🔊	LOCKSMITHIN	Select Fields		🖌 X rvati	orium of Music		Thu 12/03/2020	(None)
	7770074	ELECTRONIC S	Available Fields:	Visible Fields:				Fri 10/14	
	6768064 🛞	ELECTRONIC 3	Location Supervisor Assigned to	Work Request Actions Problem Type/PM Procedure		105		49 days ago	(None)
	6681363 🛞	ELECTRONIC 5	Building Building Name Division Department	Work Description/Comments Priority Location (Name) Equipment/Standard	rvat	orium of Music		Tue 07/19 104 days ago	(None)
	Approved (1) >		Date to Perform Time to Perform	Date to Perform/Due Info Assign to/Work Team					
	Issued and In Process (10) >		Due Date Date Work Requested Time Work Requested						
	Stopped (8) >		Date Work Completed +	and the second s					
	On Hold for Parts (1) >		Show	Hide Up Down	- 1				
	Completed (650) >			Update					
	Closed (369) >				_				



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.

Report Problem							×2
Location	- · · · ·						
Location	Use your assigned SITE Enter building, floor a	BUILDING	<i>FLOOR</i> help us process yo	ROOM		Мар	
Describe the location	Enter the location spe	ecifically enough that	maintenance can	find it, such as "F	Problem is on b	oack wall, below window.'	s.

Report Problem		
Re Select Value - Faculty Code		2ª ×
School Code	School Name	÷
	School of	0
1252	School of Economics	_
1256	School of Languages and Cultures	
1257	School of Art, Communication and English	
1259	School of Medical Sciences (SOMS)	
1261	School of Humanities	
1264	The University of Sydney School of Public Health	
1266	School of Social and Political Sciences	
1639	School of Aerospace, Mechanical and Mechatronic	
1640	School of Chemical and Biomolecular Engineering	
1641	School of Civil Engineering	



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.

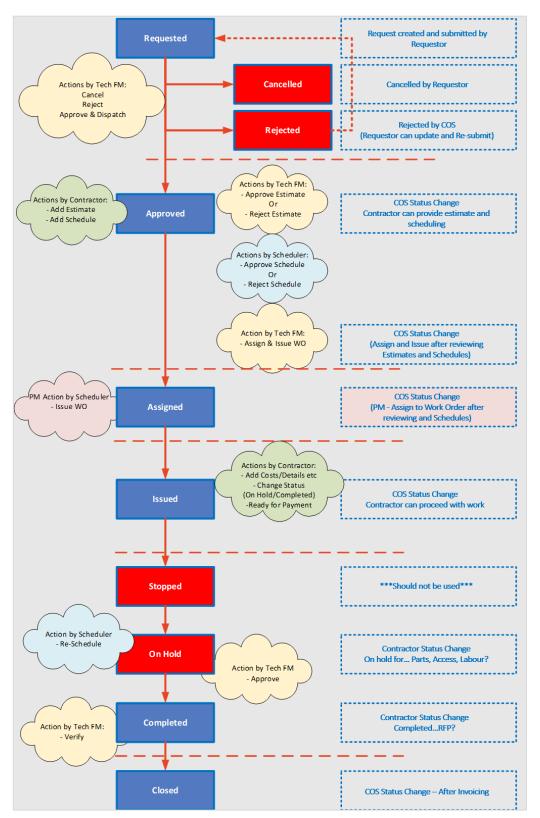
The Maintenance Console allows for the following key activities to occur:

- 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

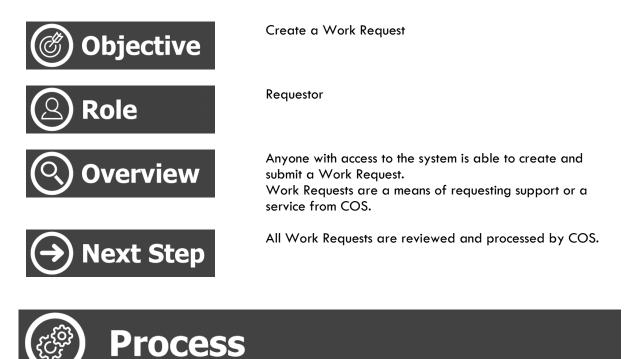
The Maintenance Console aligns with the key activities required to manage On Demand work requests:



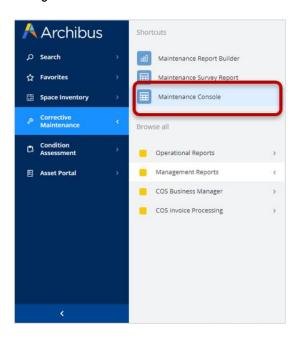


5. Requested

5.1. Work Request submitted by Requestor



Navigate to the Maintenance Console:





From the Maintenance Console frame, select Report Problem:

	Archibus	🤌 Maintenance Console			SYDNEY	?	*	8
م	Search >	Work Requests	• Locate	🖞 Export	Optic	is Rej	oort Pro	oblem
☆	Favorites >	Q Search by code, type, procedure, equipment, description, location, person Quick 1	Filters ~	🚔 Filters	Clear G	roup by:	Status	~
H	Space Inventory >							
ß	Corrective > Maintenance							

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.

Report Problem		2
Requestor		
Requested By*	JOE BLOGGS	
Requestor Phone*	9351 2000	
Email Address*		
Faculty Code	2593 Central Operations Services	
School Code*	Central Operations Services Asset Management and Operations	
Department Code*	Central Operations Services Facilities Services	

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.

School Code*	
	Central Operations Services Asset Management and Operations
Department Code*	
	Central Operations Services Facilities Services



eport Problem		
Select Value - Faculty Coc		2 X
School Code	School Name	•
	School of	3
1252	School of Economics	
1256	School of Languages and Cultures	
1257	School of Art, Communication and English	
1259	School of Medical Sciences (SOMS)	
1261	School of Humanities	
1264	The University of Sydney School of Public Health	
1266	School of Social and Political Sciences	
1639	School of Aerospace, Mechanical and Mechatronic	
1640	School of Chemical and Biomolecular Engineering	
1641	School of Civil Engineering	

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

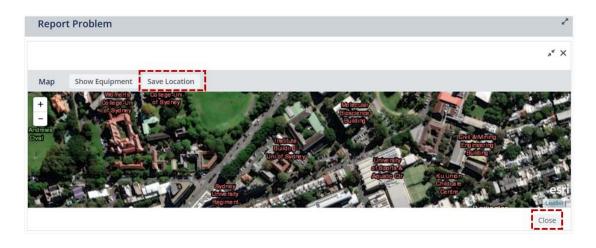
Use the free text field "Describe the Location" to provide any additional location details, such as the specific area in the room.

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.

Report Problem		ĸ ^a		
Location				
	Use your assigned workspace location			
Location	SITE BUILDING FLOOR ROOM Map			
Location	Enter building, 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,				

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.

Report Problem	
Equipment	
Equipment	
Equipment Code	You can enter the Equipment Code if you know it.
Warranty Vendor	· · · · · · · · · · · · · · · · · · ·
Warranty Expiration Date	
	Review Warranty Details List Request for Equipment

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.

Report Problem				r'a
Problem				
Account Code		Clear		
Work Request Type*	R Reactive	Clear		
Type of Problem*			~	
			~	
	View All Problem Types The more precisely you specify you	r problem, the better we can ro	oute it to people who can help.	



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.

Report Problem	2
Description	
Description*	
Drivent	 Priority 1 Emergency Priority 2 Urgent
Priority*	Priority 3 Planned Priority 4 Deferred Maintenance Priority 5 Project Requests

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.

Submit	Add Documents	Cancel

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.



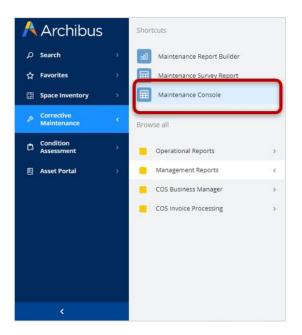
5.2. COS - Review and Approve a Request



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



Navigate to the Maintenance Console frame:





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.

🤌 Maintenance Console	😴 sydney 🧷 🛊 🛞
Work Requests	🕈 Locate 🌰 Export 💠 Options Report Problem
Q Search by code, type, procedure, equipment, description, location, person Quick Filters - Clear Group by: Status -	

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

🔑 Maintenance Console	😴 SYDNEY 🕐 🌟 🛞
Work Requests	Filters Apply Clear Cancel
Q Search by code. type. procedure. equipment. description, location, person Quick Filters V Clear Group by: Status V	General Equipment & PM Details
	Location & Organization People
	 Request Status
	> Date Range
	Costs Risk Scores

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:

😕 Maintenance Console	👺 SYDNEY 🕜 ★ 🚇
Work Requests	Filters Clear Cancel
Q, Search by code, type, procedure, equipment, description, location, person Quick Filters 🗸 📻 Filters Clear Group by: Status 🗸	> General
	Equipment & PM Details
	Location & Organization
	> People
	> Request Status
	> Date Range (2)
	> Costs
	> Risk Scores
	L



The page will refresh, and the results displayed: Note, the results are grouped by **Status** as a default view.

Wor	< Requests			• L	ocate 👌 Export	Options	Report Pro	ble
C	Search by code, type, procedure, equipment, description, location, person Quick Filters v Filters (2) Clear Group by: Status v	1						
	Work Request Actions Problem Type Work Description Priority Location (Name) Work Request \$ PM Procedure \$ Comments \$ \$ Location (Name)	¢	Equipment Code Equipment Standard	¢	Date to Perform Due Date	٥	Assigned to Work Team	
	Requested (187) >							
	Approved (1) >							
	Assigned to Work Order (851) >							
	Issued and In Process (241) >							
	On Hold for Parts (2) >							
	Completed (15) >							
	Closed (4) >							

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

	Request will be dispatched to COS SUPERVISORS			
Cancel Work Request		Save	Approve and Dispatch	Reject

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 resubmit 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 (\bigstar), 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 (\bigcirc), 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** (\vec{p}^*) icon:

Ŗ	Maint	enance	Console	2							(H)	SYDNEY	9 to
/or	k Request	ts								• Locate	🗄 Export	Options	Report Pro
a	Search by co	de, type, proced	lure, equipment,	description, location, person	Quick Filters	✓ Filters (2)	Refresh Clear	Group by: Status 🗸					
)	Work Request	¢ Actions		≎ Problem Type	Work Description Comments	Priority	⊕ Location (Name) ⊕ ⊕	Equipment Code	Reschedule Status	Revised Due Date	Due Date	Work Team Code	Problem 1 PM Proce
1	Requested	d (45) ~											
	6768247	Þ		SECURITY SERVICES PATROL SERVICE	PAT	Priority 1 Emerge	ency Services Building		N/A		22/11/2022	(None)	SECURI SERVIC SERVIC
	6768199	ø	Approve	SECURITY SERVICES PATROL SERVICE	Test	Priority 3 Non-U	rgent Sydney Dent: Hospital 04-	əl	N/A		24/11/2022	(None)	SECURI SERVIC SERVIC

Key details required when Approving a Work Request:

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



Priority	Review and adjust priority level as required.

Approve Work Reque	st 6768247			~ ×
Requested By	JOHN LOHR			
Site Code*		Equipment Code		
Building Code		School Code*	1045	
Floor Code		Department Code*		
				+
Room Code			Drag-and-drop here	-
Latitude			Drag-and-drop here	T
Longitude		Document 3	Drag-and-drop here	Ť
Problem Type	SECURITY SERVICES PATROL SERV	Document 4	Drag-and-drop here	1
Equipment Condition	0 - Not Entered 🛛 🗸	Adjusted Condition	0 - Not Entered 💙	
Priority Rating	0 - Not Entered 💙	Adjusted Priority	0 - Not Entered 🛛 👻	
Criticality	0 - Not Entered 🗸 🗸	Adjusted Criticality	0 - Not Entered 👻	
Equipment Risk Score	0	Adjusted Risk Score	0	
Work Request Type"	R	Cost Type*	~	
Work Request Type* Work Team Code*		Account Code		Clear
Purchase Order Code*	Clear	Safety	~	
·	Clear	sarety		
Purchase Order Line		Severe Weather Impact	No V	
Vendor Name		Insurance Flag	No 🗸	
PO Line Item Description Work Description*	PAT			
Customer Notes History New Customer Notes Work Notes History				
New Work Notes				
Related Requests				
	Priority 1 Emergency			
	O Priority 2 Urgent			
Priority*	 Priority 3 Non-Urgent 			
	 Priority 4 Planned 			
	 Priority 5 Projects 			
	Workflow			
	Response required within 60 Minutes Completion required within 80 Minutes Workflow Steps: On status of Requested: Edit and Approve is requ On status of Approved: Estimation is required by On status of Approved: Scheduling is required by	COS SECURITY SUPERVISOR		
	Request will be dispatched to COS SECURITY OPE	RATION		
Cancel Work Request		Save Re-Route	Approve and Dispatch Reject	t

The page will refresh, and the actioned request will now display in the **Approved** status group:



🤌 Ma	intenance (Console												C. C	SYDNEY	0 ti	8
Work Requ	Jests												• Loca	te 🏦 Export	Option	ns Report	Problem
Q 6768247	7				X Qu	ickFilters 🗸 🥃	Filters (1) Re	resh Clea	r Group	by: Stati	is ~						
Work Request	÷ Actions t		¢	Problem Type		 Work Description Comments 	\$ Priority	¢	Location (Name)	¢	Equipment Code	Reschedule Status		tevised Due Oate	Due Date $\hat{\neg}$	Work Team Code	n≎ Pr ₽M
Appro	wed (1) ~																
676824	7 @ Ė	j 🖪		SECURITY SERVICES PA	TROL SERV	ICE PAT	Priority	Emergency	Services	Building		N/A			6/2/2023	ACES	

There are 3 actions that can occur for this request:

Approved (2) ~					
Estimate Schedule Assign to Work Orde	CAR5979 :: Changed Site Code from '02' to 'None'	Priority 3 Non-Urgent	Services Building 01-111	Wed 09/11/2022 44 days ago	AA! FRE

Estimate – Next Mandatory action (💣) 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.



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 <u>Section 13 – On Demand SLAs</u> for details on what rules apply in what circumstances.



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:

Approve Work Reque	st 6770338	"* ×
Work Notes History		
New Work Notes		10
Related Requests		
Priority*	 Priority 1 Emergency Priority 2 Urgent Priority 3 Planned Priority 4 Deferred Maintenance Priority 5 Project Requests 	
	Workflow Response required within 1 Hours Completion required within 1 Days Workflow Steps: On status of Requested: Edit and Approve is required by COS TECHNICAL FM	
Cancel Work Request	Request will be dispatched to COS SUPERVISORS Save Re-Route Approve and Dispatch Reject	



• 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:



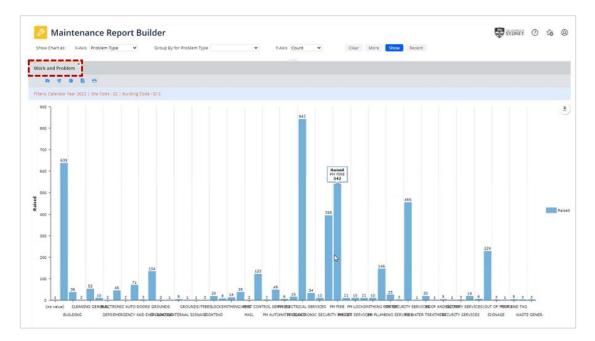
A	Archibus	Shortcuts	
م	Search	Maintenance Report Builder	
습	Favorites	Maintenance Survey Report	
	Space Inventory	Maintenance Console	
ß	Corrective Maintenance	Browse all	
۵	Condition Assessment	Operational Reports	
	Asset Portal	Management Reports >	

Select from the **Shows Chart as** fields to define your report. Then, click **Show** button:

🤌 Maintenance Report Bu		SYDNEY 🕐 🏠 🛞
Show Chart as: X-Axis Month	Group By for Month V-Avis Count V Clear More Stow Recent	

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

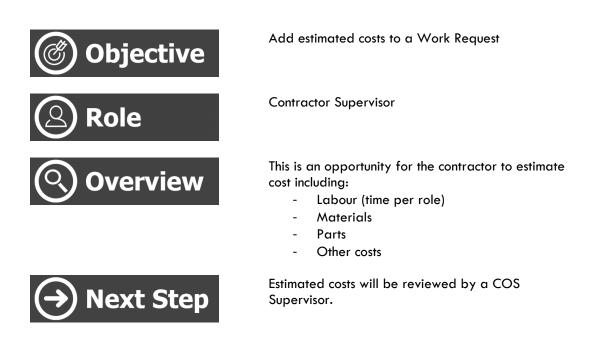
🤌 Maintenance Report B	uilder	More	SYDN	ËŸ Ø	to
Show Chart as: X-Axis Problem Type 💙	Group By for Problem Type	Y-Axis Count 👻 Clear Less	Show Recent		
elect Filters Select Year Calendar Year V 2022 V	Work Type All	Work Status All	Schedule Status All		
02	G12	Floor Code	Work Team		
Division Code	Department Code	Equipment Standard	Supervisor		
Problem Type	Primary Trade	Equipment Code	Craftsperson		





6. Approved

6.1. Contractor - Add Estimate to a Work Request



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.

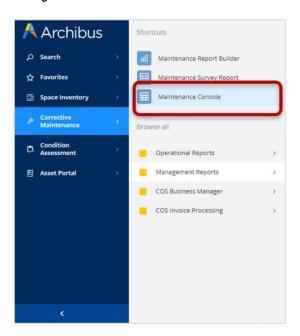
This section focuses on the contractor's responsibility of adding an estimate.

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:

🤌 Maintenance Console		😴 SYDNEY 🕐 🌟 🛞
Work Requests		🕈 Locate 🏦 Export 🏶 Options Report Problem
Q. Search by code, type, procedure, equipment, description, location, person	Quick Filters Refresh Clear Group by: Status v	

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 ():

² Maintenance Console						SYDNEY	?
ork Requests					♥ Locate	Export 🗳 Options	Report Prob
Q Search by code, type, procedure, equipment, description, lo	cation, person	Quick Filters v Filters (2)	Refresh Clear Group I	oy: Status 👻			
Work Request \diamond	Problem Type PM Procedure 🗘	Work Description Comments	Priority	Location (Name)	Equipment Code Equipment Standard 🌻	Date to Perform Due Date	Assigned to Work Team
Requested (186) >							
Approved (1) ~							
6770183	FIRE SERVICES	Not sure what's going on with the FIP	Priority 3 Planned	John Woolley Building 02-		Tue 13/12/2022 13 days ago	BDOSSEL AIRMASTER

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.

Issued and I	n Process (241) ~					
6770467	≞ ⊖ ∕ ⊙	CLEANING GENERAL	Test INT AU 19Dec2022	Priority 1 Emergency	Abercromble Student Housing 01-100	Thu 19/01 11 days aį
6770427	0 0 0 0	BUILDING	Test-StarRez-Intg-05122022	Priority 1 Emergency	Abercromble Student Housing 01-100	Tue 13/12 34 days at
6769803	Hold Complete	FIRE SERVICES	fault on FIP Issued to Airmaster.	Priority 3 Planned	RD Watt Building	Tue 13/12 13 days ai
	Stop Update					

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:

Approved (6770183	(1) ~	FIRE SERVICES	Not sure what's going on with the FiP.	Priority 3 Planned	John Woolley Building 02-		Tue 13/12/2022 13 days ago	BDOS: AIRMA
Assigned to	Work Order (851) ~							
6770508	% Ё ↔ ⊗	PM FIRE	Fire System Interface Testing, 12 Months, D18	3 - Scheduled	Susan Wakil Health Building XS-OSB	D18-XS-OSB-12001- 01 12001	Wed 01/02	AIRMA
6770507	@ Ё ↔ ⊗	PM FIRE	Annual Condition Reporting, 12 Months, D18	3 - Scheduled	Susan Wakil Health Building XS-OSB	D18-XS-OSB-12001- 01 12001	Wed 01/02	AIRMA
6770182	@i ≓ ⇔ ⊗	PM FUME CUPBOARD	Mechanical Services Fume Cupboard Maintenance-Prev entative Maintenance	3 - Scheduled	Engineering Link Building 04-424	J13-04-424-11311-02 11311	Fri 15/09 250 days left	GHAM AIRMA
6770181	@ ⊟ ⇔ ⊗	PM FUME CUPBOARD	Mechanical Services Fume Cupboard Maintenance-Prev entative Maintenance	3 - Scheduled	Engineering Link Building 04-424	J13-04-424-11311-01 11311	Fri 15/09 250 days left	GHAM AIRMA

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.





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

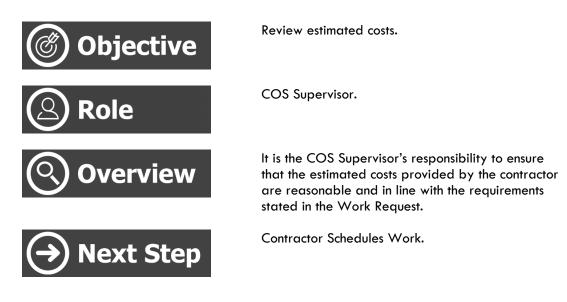
The status of an icon are designated by a dot or star:

- 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



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.

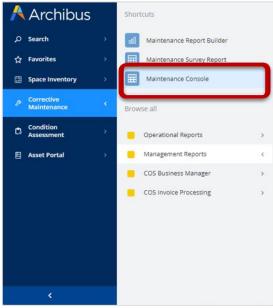
Note, a contractor cannot proceed with commencing the physical works relating to a Work Request until the following has occurred:

• Estimate has been approved



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





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:

ork Requests			Filters Apply Clear Cancel
2 Search by code, type, procedure, equipment, description, location, person	Quick Filters - Efferts	Refresh Clear Group by Status v	General Request Status (1) Approved Assigned to Vork Order Issued Stopped On Hold Completed Escalated7 Returned7 Reschedule Status
			Equipment & PM Details Location & Organization People Date Range Date Requested From Date Requested To



Review any Work Requests that have a pending **Approve** task icon:

Norl	k Requests									♥ Loo	ate 🏦 Export	Coptions R	leport Problem
Q	Search by code	, type, procedure	, equipment, descript	ion, location, person	Quick Filters ~	Eliters (1) Refresh	Clear	Group by: S	itatus 🗸				
	Work Request	Actions	\$	Problem Type PM Procedure \$	Work Description Comments	٥	Priority	¢	Location (Name)		oment Code oment Standard	Date to Perform Due Date	Assigne Work To
	Approved (1) ~											
	6679454	@ E		CLEANING GENERAL	Please provide cleaning fo Assigned to GJK (kf)	at Cumberland campus	Priorit	y 3 Planned	Nonspecific Building - Cumberland			Fri 08/07/2022 172 days ago	GJК

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:

	Work Request 6679454	12° - 2
Customer Facing Co	omments	
Work Notes History		//
New Work Notes		//
New Work Notes		
Return To:		
Creator KFOR1354		
O Estimator Contract Su	pervisor	
🔾 Scheduler Contract Su	ipervisor	
Cancel Work Request	Delett	
Cancel work Request	Reject Approve Estimate	

Once actioned, the Work Request will be updated accordingly.



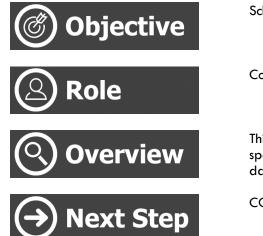
Rejected estimates will display in the Contractor's Approved screen marked with a red star(\star) indicating that an action is still required for the estimate step icon.

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



Schedule resources.

Contractor Supervisor.

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 lssued 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.



Navigate to the Maintenance Console frame:



A	Archibus		Shortcuts	
٩	Search		Maintenance Report Builder	
☆	Favorites		Maintenance Survey Report	
#	Space Inventory		Maintenance Console	l
B	Corrective Maintenance	¢	Browse all	'
ß	Condition Assessment		Operational Reports	
8	Asset Portal		Management Reports	
			COS Business Manager >	
			COS Invoice Processing	
	<			

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

🤌 Maintenance Console			SYDNEY	⊘ ★	0
Work Requests	• Locate	1 Export	Options	Report Pr	roblem
Q. Search by code type, procedure, equipment, description, location, person Quick Filters .					

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 (\bigstar):

Wor	rk Requests	5								♀ Locate	Export 🗘 O	ptions Repor	t Problem
0	Q Search by code	le, type, procedure	, equipment, descr	iption, location, person	Quick Filters 🗸	📑 Filters Re	fresh Clear Grou	p by: Status 🗸					
	Work : Request	\$ Actions	¢	Problem Type	Work Description Comments	Priority	Cocation (Name)	Equipment Code	Reschedule Status	Revised Due Date	Due Date	Work Team Code	Probler PM Pro
	Requested	(52) >											
	Approved ((47) ~											
	6768247	G 🗂	B	SECURITY SERVICES PATROL SERVICE	PAT	Priority 1 Er	mergency Service Buildin		N/A		6/2/2023	ACES	SECI SERV
	6768164	G 🗖		SECURITY SERVICES PATROL SERVICE	TEST789	Priority 1 Er	nergency Service Buildir 01-129	g	N/A		10/11/2022	ACES	SECI SERI
	6768160	9 8	Schedule	SECURITY SERVICES PATROL SERVICE	Testing for Patrol	Priority 3 N	on-Urgent Service Buildir 01-129	8	N/A		16/11/2022	ACES	SECI SER\
	6768154	G 🗂	B	SECURITY SERVICES LOCK UNLOCK	TEST	Priority 3 N	on-Urgent Service Buildir 01-111	g	N/A		15/11/2022	ACES	SECI

Select the **Schedule** Button:



Select the Assign Craftsperson option:



Schedule Work Request 6768140		«* ×
Schedule requests to better plan and balance work for teams and craftspersons. You can change the schedule assignments until you issue the request.		
Work Description TEST UNIBUY Work Notes		
Trades Add Craftspersons Un-Assign Craftsperson No records to display.		
> Tools Assign Tool		
	Complete Scheduling	Close

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.

Assign Craftsperson	e^n \times
Craftsperson Code* Date Tradesperson Assigned* Time Tradesperson Assigned*	Scheduled Ounscheduled
Estim. Hours	3.00
Work Type	Work 🗸
Assignment Status	Active 🗸
Estimated Cost	0.00
Actual Cost of Labour	0.00
On Site Hours	0.00
	Save Cancel

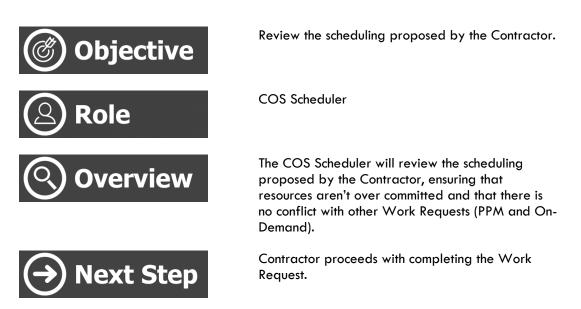
Then click the **Save** button. You now see the estimation, which is done based on the trade role alongside the actual craftsperson assigned to the task by means of Scheduling.

Click the **Complete Scheduling** button:



Sc	hedule	Work R	equest 676	8164								"» ×
Sch	nedule requ	iests to be	tter plan and b	alance work for teams and	d craftspersons. You	i can change th	e schedule assign	iments until y	ou issue the reques	t.		
				ription TEST789 Notes								
~	Trades											
Tra	ide Code	\$ Ti	rade Descriptio	n	÷	Estimated Hours \$	Estimated Cost		ight time Trade Hours ‡	Doubletime Hour		Overtime Hours
AC	EGRAD1WK	DAY A	CES Guard Grac	le 1 Week DAY (hrs betwe	en 6am-6p	6.00	248.2	22]
~	Craftspe	ersons	Un-Assign	Assign Craftsperson								
	Crafts	person	Tradespers Name	on Date Tradesperson Assigned	Time Tradesperson Assigned	Estim. Hours	Estimated Cost	Actual Hours	Doubletime Hours	Overtime Hours	Actual Cost of Labour	On Si Hou
	BHAM	ILTON	Brett Hamil	ton 24/1/2023	8:00 am	3.0	0.00	00				
>	Tools	Assign	Tool									
									Complet	e Scheduling Cl	ose	

6.4. COS - Review Schedule



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:



A	Archibus		Shortcuts
٩	Search		Maintenance Report Builder
☆	Favorites		Maintenance Survey Report
#	Space Inventory	>	Maintenance Console
P	Corrective Maintenance	<	Browse all
۵	Condition Assessment		Operational Reports
8	Asset Portal		Management Reports <
			COS Business Manager >
			COS Invoice Processing
	<		

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

Maintenance Console		😴 ŝ	SYDNEY (2 🛊	0
Work Requests	• Locate	🗄 Export 📫	Dptions	Report Prob	ilem
Q. Search by code, type, procedure, equipment, description, location, person Quick Filters Filters Refresh Clear Group by: Status -					

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:

🔑 Maintenance Console	😨 SYDNEY 🕐 🌪 🤅
Work Requests	Filters Apply Clear Cancel
A search by code, type, procedure, equipment, description, location, person Quick Filters • Effersh Clear Group by: Status •	General Canonal Request Status (1) Assigned to Work Order assigned to Work Order stoped On Hold Completed Esculated? Returned? Returned? Reschedule Status Completed Completed Completed Vate Requested From Date Range Date Range Date Range Date Range



Review any Work Requests that have a pending **Approve** task:

ß	Main	tena	nce Co	onsole	9										SYDN	ey 🕐 🚖	r
Wor	k Reques	ts											♀ Lo	cate 🛆 Export	Ф Ор	tions Report P	Proble
0	ς Search by α	ode, type,	procedure, e	equipment,	description, l	ocation, person	Quick Fi	ters 👻 📑 Filters (2)	Refresh	Clear Group by: Status v							
	Work Request	\$	Actions		¢	Problem Type PM Procedure	÷	Work Description Comments	÷	Priority	¢	Location (Name)	¢	Equipment Code Equipment Stand		Date to Perform Due Date	÷
	Approved	(108)	~														
	6770183		9	i.		FIRE SERVICES		Not sure what's going FIP.	on with the	Priority 3 Planned		John Woolley Bu 02-	ilding			Tue 13/12/2022 20 days ago	
	6765936		9	G (<u>ک</u>			Hi team, Please arran walkthrough, identi	-	Priority 3 Planned		Mallett St Buildin 01-100	ng F			Mon 31/10/2022 88 days ago	2

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



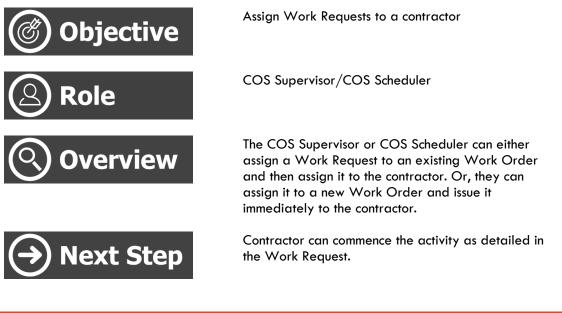
From the resulting pop-up pane, make a selection to either **Approve** or **Reject** the Schedule. Add **Comments** and select the **Return To** option (if rejecting) as applicable:

Approve Schedule Work Request 6765936 $e^{\pi} \times$
Show the details of the Work Request by clicking this <u>link</u> . Customer Facing Comments
Work Notes History
•
New Work Notes
Return To:
Oreator HSHT2017
○ Estimator Contract Supervisor
○ Scheduler Contract Supervisor
Cancel Work Request Reject Approve Schedule



7. Assign

7.1. COS Assign a Work Request to a Work Order





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)



Navigate to the Maintenance Console frame:



A	Archibus		Shortcuts
م	Search		Maintenance Report Builder
슈	Favorites		Maintenance Survey Report
8	Space Inventory		Maintenance Console
Þ	Corrective Maintenance	¢	Browse all
۵	Condition Assessment		Operational Reports
B	Asset Portal		Management Reports <
			COS Business Manager >
			COS Invoice Processing
	<		

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

🤌 Maintenance Console			SYDNEY	⊘ ★	0
Work Requests	• Locate	1 Export	Options	Report Pro	oblem
o Search by code, type, procedure, equipment, description, location, person Quick-Filters : Filters Refresh Clear Group by: Status -					

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:

/ork Requests				Filters Apply Clear Cancel
α Search by code. type, procedure, equipment, description, location, person	Quick Filters v	Refresh Clear	Group by: Status u	General Request Status (1) Approved Approved Assigned to Work Order Status Stopped On Hold On Hold Completed Escalated? Returned? Returned? Returned? Equipment & PM Details Location & Organization People Date Requested From Date Requested To



Review any Work Requests that have a pending Assign to Work Order task:

_	enance Console				₩.	ydney 🕐 🚖
/ork Requests	5				🕈 Locate 🔥 Export 🕇	Options Report Pro
Q Search by cod	e, type, procedure, equipment, descr	ption, location, person Quic	k Filters 🗸 📑 Filters (3) Refresh Cle	ear Group by: Status 🗸		
Work Request	Actions	 Problem Type PM Procedure 	Work Description Comments	Priority	 Location (Name) Equipment Code Equipment Standa 	Date to Perform rd Due Date
Approved	(108) ~					
6770183	Assig	FIRE SERVICES	Not sure what's going on with the FIP.	Priority 3 Planned	John Woolley Building 02-	Tue 13/12/2022 20 days ago
6768164	G 🕂 🖬	SERVICE	TEST789	Priority 1 Emergency	Services Building 01-129	Tue 24/01 81 days ago

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 Work Request 67	70183	2 ×
Assign to Existing Work Order	Assign to New Work Order Assign and Issue Work Order	
Select Work Order Fields	·······	

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 Reque	st 6770183	2
Assign to Existing Work C	rder Assign to New Work Order Assign and Issue Work Order	
Select Work Order Fie	lds	
	Work Order Code	
		8
Assign	100003 light reported to be flickering in T427	
Assign	102811 The first cubicle on right is not flushing prop	
Assign	102815 Signs of oil around TX valve. Leak testing and	
Assign	105292 Preventive Maintenance for Thursday, Novembe	r 0
Assign	105532 Preventive Maintenance for 01/NOV/11 For HIRC	TE
Assign	105533 Preventive Maintenance for 01/NOV/11 For HIRC	TE
Assign	105534 Preventive Maintenance for 01/NOV/11 For HIRO	TE
Assign	105536 Preventive Maintenance for 01/NOV/11 For HIRC	TE
Assign	105538 Preventive Maintenance for 01/NOV/11 For HIRC	TE
Assign	105540 Preventive Maintenance for 01/NOV/11 For HIRO	TE
Assign	105541 Preventive Maintenance for 01/NOV/11 For HIRC	TE
Assign	105542 Preventive Maintenance for 01/NOV/11 For HIRO	TE
Assign	105544 Preventive Maintenance for 01/NOV/11 For HIRC	TE
Assign	105545 Preventive Maintenance for 01/NOV/11 For HIRO	TE
Assign	105546 Preventive Maintenance for 01/NOV/11 For HIRO)TE
Assign	105547 Preventive Maintenance for 01/NOV/11 For HIRO	TE
Assign	105548 Preventive Maintenance for Friday, December 02	2,

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:

Assigned to \											
6770508	9	ť	⇔	\otimes	PM FIRE	Fire System Interface Testing, 12 Months, D18	3 - Scheduled	Susan Wakil Health Building XS-OSB	D18-XS-OSB-12001- 01 12001	Wed 01/02	GHAMMA
6770507	6	6	⇔	\otimes	PM FIRE	Annual Condition Reporting, 12 Months, D18	3 - Scheduled	Susan Wakil Health Building XS-OSB	D18-XS-OSB-12001- 01 12001	Wed 01/02	GHAMMAI
6770182	G	ť	⇔	8	PM FUME CUPBOARD	Mechanical Services Fume Cupboard Maintenance-Prev entative Maintenance	3 - Scheduled	Engineering Link Building 04-424	J13-04-424-11311-02 11311	Fri 15/09 243 days left	GHAMMA
6770181	G	6	₽	\otimes	PM FUME CUPBOARD	Mechanical Services Fume Cupboard Maintenance-Prev entative Maintenance	3 - Scheduled	Engineering Link Building 04-424	J13-04-424-11311-01 11311	Fri 15/09 243 days left	GHAMMA

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 Work Request 677	0183		** ×
Assign to Existing Work Order	Assign to New Work Order As	sign and Issue Work Order	



Enter	a descri	ption ir	nto the	Descriptior	i field	and then	click	on the	Assian	button:
LINCI	a acsen			Pesenpiloi	1 11010	and men	Chercit		/	2011011

Assign Work Request 677	0183	2 ⁸ ×
Assign to Existing Work Order	Assign to New Work Order	Assign and Issue Work Order
	Account	
	Description*	
	Building	
	Division	
	Department	
		Assign Cancel

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 Wo	ork Orde	r (15	576) ~								
6770508	9	d'	⇔	8	PM FIRE	Fire System Interface Testing, 12 Months, D18	3 - Scheduled	Susan Wakil Health Building XS-OSB	D18-XS-O5B-12001- 01 12001	Wed 01/02	GHAMMAN AIRMASTEI
6770507	6	Ċ	⇔	8	PM FIRE	Annual Condition Reporting, 12 Months, D18	3 - Scheduled	Susan Wakil Health Building XS-OSB	D18-XS-OSB-12001- 01 12001	Wed 01/02	GHAMMAN AIRMASTEI
6770182	G	ť	⇔	\otimes	PM FUME CUPBOARD	Mechanical Services Fume Cupboard Maintenance-Prev entative Maintenance	3 - Scheduled	Engineering Link Building 04-424	J13-04-424-11311-02 11311	Fri 15/09 243 days left	GHAMMAN AIRMASTEI
6770181		6		⊗ Issue	PM FUME CUPBOARD	Mechanical Services Fume Cupboard Maintenance-Prev entative Maintenance	3 - Scheduled	Engineering Link Building 04-424	J13-04-424-11311-01 11311	Fri 15/09 243 days left	GHAMMAN AIRMASTEI

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		$e^n \times$
Assign to Existing Work Order Assign to New Work Order	Assign and Issue Work Order	

Enter a description into the **Description** field and then click on the **Assign and Issue** button:



	Account	
٦	escription*	
	Building	
	Division	
D	epartment	

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:

ß	Maintenar									SYDN	iey 🕜 🚖
ork	Requests								♥ Loca	ate 🗄 Export 🏟 Og	otions Report Prot
⁄2s	cancel Se	lection	Estimate	Schedule	Schedule Labor	Assign					
	Nork ¢ Request	Actions		¢	Problem Type PM Procedure	¢	Work Description Comments	Priority	Cocation (Name)	Equipment Code Equipment Standard	Date to Perform Due Date
	Approved (108)	~									
]	5770183	9° 🛱	æ		FIRE SERVICES		Not sure what's going on with the FIP.	Priority 3 Planned	John Woolley Building 02-		Tue 13/12/2022 20 days ago
J	5768163	9° 8	Ð		FIRE SERVICES		TEST	Priority 3 Planned	Services Building 01-111		Thu 10/11/2022 53 days ago
	5768160	9° 8			SECURITY SERVICES	SIPATROL	Testing for Patrol	Priority 3 Non-Urgent	Services Building 01-129		Thu 10/11/2022 75 days ago

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



-		tenance C	onsole	•			
(<u> </u>	Reque	Cancel Selection	Estimate	Schedule	Schedule Labor	Assign	
	Work Request	¢ Actions		¢	Problem Type PM Procedure	0	Work Description Comments
	Approve	d (108) ~					

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.

Work Requests	• Locate	合 Export	•	Options	Rep	ort Problem				
Vork Request	¢	Work Notes	Problem Type PM Procedure	Work Description Comments	n ⇔ Pri ≑	ority	4	Location (Name)	4.	Equipment Code Equipment Standard

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



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

Message		×
These Work Requests cannot be assigned steps.	because Work Request 6768164 contains pendi	ng
	ОК	

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

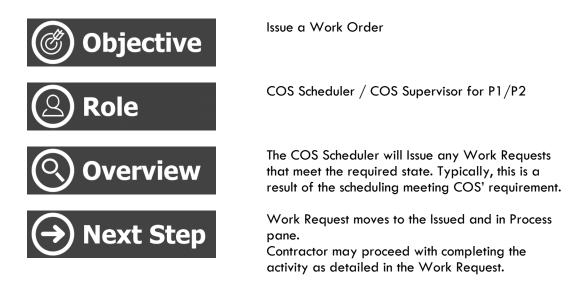
- Assign to Existing Work Order
- Assign to New Work Order
- Assign and Issue Work Order

Assign Work Request		2* ×
Assign to Existing Work Order	Assign to New Work Order Assign and Issue Work Order	
Select Work Order Fields		



8. Issue

8.1. COS Issue a Work Order to a Contractor



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.



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.

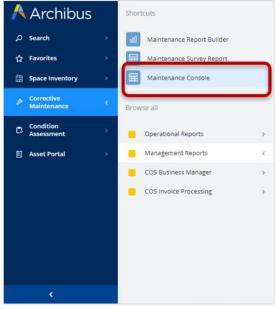


When completing the Assign step for On Demand Work Requests, selecting the Assign and Issue Work Order option will move those Work Request directly into the Issued and in Process status. The advantage with this methodology is that it will keep the On-Demand Work Requests separate to the PPM requests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





Navigate to the Maintenance Console frame:



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

Maintenance Console	Sydney 🔿 🌟 🤅
ork Requests	♥ Locate
Q. Search by code. type. procedure. equipment. description. location. person Quick Filters • 📰 Filters Refresh Clear Group by: Status •	

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:



😕 Maintenance Console	👹 sydney 🕜 🌟 @
Work Requests	Filters Apply Clear Cancel
Q, Search by code, type, procedure, equipment, description, location, person Quick Filters 🛛 🗮 Filters Refresh Clear Group by: Status 🗸	> General
	✓ Request Status
	Approved Assigned to Work Order
	> Equipment & PM Details
	> Location & Organization
	> People
	> Date Range
	> Costs
	> Risk Scores

Review any Work Requests that have a pending **Issue** task:

	Work Request	¢	Actions				¢	Problem Type PM Procedure	¢	Work Description Comments	¢	Priority 🗘	Location (Name)	Equipment Code Equipment Standard	Date to Perform Due Date	Assigned t Work Tear
	Assigned	to Wor	k Orde	r (15	576) ~											
	6770508		6	Ċ,	⇔	\otimes		PM FIRE		Fire System Interface Testing, 12 Months, D18		3 - Scheduleo	Susan Wakil Health Buildi XS-OSB	ng D18-XS-OSB-12001- 01 12001	Wed 01/02	GHAMMAI AIRMASTE
	6770507		6	ť	⇔	\otimes		PM FIRE		Annual Condition Reporting, 12 Months, D18		3 - Scheduleo	Susan Wakil Health Buildi XS-OSB	01 01 12001	Wed 01/02	GHAMMAR
	6770182		G.		⇔	\otimes		PM FUME CUPBOARD		Mechanical Services Fume Cupboard Maintena entative Maintenance	nce-Prev	3 - Schedulec	Engineering Link Building 04-424	J13-04-424-11311-02 11311	Fri 15/09 243 days left	GHAMMAI AIRMASTE
	6770181		୍ୱ	±	⇔	\otimes		PM FUME CUPBOARD		Mechanical Services Fume Cupboard Maintena entative Maintenance	nce-Prev	7 3 - Schedulec	Engineering Link Building 04-424	J13-04-424-11311-01 11311	Fri 15/09 243 days left	GHAMMAI
•••••					7	Issue		10.00000							A.M. 4945 (61)	

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:

Message	×
These Work Requests cannot be Issued because there is no Purchase Order Code for Work Request 5703837.	
ОК	

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:



🤌 Maintenance Console			\$	sydney 🔿 ★ 🛞
Work Requests			🗣 Locate 🏦 Export 🗱	Options Report Problem
Q Search by code, type, procedure, equipment, description, location, person	Quick Filters 🗸 🧱 Filters Refresh	Clear Group by: Status 🗸		
□ Work Request ⇔ Actions	Work Description \Diamond	Priority 🗘 Location (Name) 🗘	Equipment Code Date to Equipment Standard $\stackrel{\circ}{=}$ Due Dat	
Issued and In Process (1) ~				
🗌 6770508 🕘 🖂 🖉 💬 PM FIRE	Fire System Interface Testing, 12 Months, D18	3 - Scheduled Susan Wakil Health Building XS-OSB	D18-XS-OSB-12001-01 Wed 01 12001	1/02 GHAMMAN AIRMASTER

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:

Mor	k Reques	ete								♥ Locate	Options Re	eport Problem
	k keque:									Cocate Export	W Options	DOTCHTODIE
× 3	selected	Cancel Selection	on	Estimate	e Schedul	e Schedule Labor	Issue Cancel Request					
	Work Request	¢ Actio	ins		4	Problem Type PM Procedure	Work Description Comments	Priority 👙		Equipment Code Equipment Standard	Date to Perform Due Date	Assigne Work Te
	Assigned	to Work Or	der (1	575) \								
	6770507	9	6	⇔	\otimes	PM FIRE	Annual Condition Reporting, 12 Months, D18	3 - Scheduled	Susan Wakil Health Building XS-OSB	D18-XS-OSB-12001- 01 12001	Wed 01/02	GHAMM AIRMAST
2	6770182	9	6	⇔	\otimes	PM FUME CUPBOARD	Mechanical Services Fume Cupboard Maintenance-Prev entative Maintenance	3 - Scheduled	Engineering Link Building 04-424	J13-04-424-11311-02 11311	Fri 15/09 243 days left	GHAMM
	6770181	9	6	⇔	\otimes	PM FUME CUPBOARD	Mechanical Services Fume Cupboard Maintenance-Prev entative Maintenance	3 - Scheduled	Engineering Link Building 04-424	J13-04-424-11311-01 11311	Fri 15/09 243 days left	GHAMN

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

	ntenance (Console					
Work Reque	Cancel Selection	Estimate	Schedule	Schedule Labor	Issue	Cancel Request	
Work Request	¢ Actions		0	Problem Type PM Procedure	A. 2000	k Description nments	
Assigne	d to Work Order	(1575) ~					

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.

Work Requests			9	Locate	合 Export	🏚 Op	otions	Report Problem
Vork Cancel Selection Work Cancel Selection Actions	Work Notes	Problem Type PM Procedure	Work Description Comments	Priori	ty	<u>~</u>	ocation ame)	Equipment Code Equipment Standard

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

Iccuo	
155UC	

You will be asked to confirm the action:

Issue Work Request	~ 2	×
This action issues the request to the field personnel, at whic cannot be canceled, only completed, put on hold, or stoppe		
Yes No		

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

Message	×
These Work Requests cannot be Issued because there is no Purchase Order Code for Work Request 5703837.	
ОК	

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:

🤌 Maintenance Console			SYDNEY	⊘ ★ ⊗
Work Requests			🕈 Locate 🏦 Export 🗱 Option	s Report Problem
Q Search by code, type, procedure, equipment, description, location, person	Quick Filters 🗸 📑 Filters Refresh	Clear Group by: Status v		
Work Request Actions Actions Problem Type PM Procedure	Work Description Comments	Priority Location (Name) \diamondsuit	Equipment Code Date to Perform Equipment Standard $\stackrel{\odot}{=}$ Due Date	Assigned to Work Team
□ Issued and In Process(1) ~				
🗌 6770508 🕑 🔗 🔗 PM FIRE	Fire System Interface Testing, 12 Months, D18	3 - Scheduled Susan Wakil Health Building XS-OSB	D18-XS-OSB-12001-01 Wed 01/02 12001	GHAMMAN AIRMASTER



9. Issued and in Process

9.1. Contractor – Manage your Work Requests





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
 - \circ Supporting documentation
- Change the status of a Work Request to (as required):
 - \circ On Hold for Access
 - $\circ \quad \text{On Hold for Labour}$
 - On Hold for Parts
 - \circ Completed
- When all is done, Flag the WR as Ready for Review of Payment.

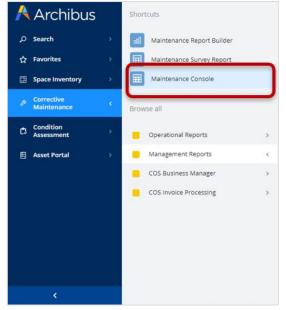


- Resolve any WR issues in these scenarios:
 - A WR is not Verified by COS
 - $\circ~$ A WR has not been approved for payment by COS



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

Naviaate to	the	Maintenance	Console	frame:
i ta ngalo io		// annonanco	00110010	in anno.



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:



_		
rk Requests		Filters Apply Clear Cancel
Search by code, type, procedure, equipment, description, location, person	Quick Filters - Filters Refresh Clear Group by: Status	> General
		✓ Request Status
		Approved
		Assigned to Work Order
		Stopped 🗌
		On Hold
		Completed
		Escalated?
		Reschedule Status
		×
		> Equipment & PM Details
		> Location & Organization
		> People
		> Date Range
		> Costs
		Risk Scores

Work Requests in the Issued and in Process status will be displayed:

															-	SYDNEY		
Wor	k Requests													Q Locate	🗄 Export	Coption	ns Report P	roblen
C	χ Search by code, tj	pe, proced	lure, eq	juipme	nt, descri	ption, lo	ocation, person	Q	uick Filters 🗸 📑 Filters (3) Refre	sh Clea	r Group by: Status 🗸							
	Work 0 Request	Action	5			0	Problem Type PM Procedure	0	Work Description Comments	٥	Priority		Location (Name)	¢	Equipment Coo Equipment Sta		Date to Perfo Due Date	m ¢
	Issued and In	Process	(246)	~														
	6770532	٢	Θ	0	\odot		FIRE SERVICES		F342_Adding Account Code to Uploa _T Q AXIA8593 :: Bulk Upload Auto Issu		Priority 3 Planned	2	Services Building 01-100A				Fri 01/07/202 17 days left	.2
	6770508	٢	Θ	0	\oslash		PM FIRE		Fire System Interface Testing, 12 Mo	nths, D18	3 - Scheduled		Susan Wakil Health Bu XS-OSB	uilding	D18-XS-OSB- 01 12001	12001-	Wed 01/02	
	6770467	٩	Θ	0	\odot		CLEANING GENERAL		Test INT AU 19Dec2022		Priority 1 Emergen	y	Abercrombie Student 01-100	Housing			Thu 19/01 18 days ago	
	6770427	9	Θ	0	\odot		BUILDING		Test-StarRez-Intg-05122022		Priority 1 Emergen	cy)	Abercrombie Student 01-100	Housing			Tue 13/12/20 41 days ago	122

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:

ß	Mair	ntenano	e C	ons	sole	9										1918	SYDNEY	0	* (
Wor	k Reque	sts													• Locate	▲ Export	Coption	ns Repo	rt Proble
~ 3	selected	Cancel Selec	tion	Hold	4	Stop	Update	Complete											
	Work Request	¢ Act	ons					Problem Type PM Procedure	¢	Work Description Comments	¢	Priority	¢	Location (Name)		Equipment Co Equipment St		Date to Per Due Date	form
	Issued a	nd In Proce	ss (24	6) ~															
	6770532	ł	9 6) (>	Ø		FIRE SERVICES		F342_Adding Account Code to Upload Ter _T _ AXIA8593 :: Bulk Upload Auto Issue	mplates	Priority 3 Plann	ned	Services Building 01-100A				Fri 01/07/ 17 days le	
	6770508	ł	9 6) (9	0		PM FIRE		Fire System Interface Testing, 12 Months,	D18	3 - Scheduled		Susan Wakil Health Bi XS-OSB	uilding	D18-XS-OS 01 12001	8-12001-	Wed 01/0	2
	6770467	ł	9 6) (>	0		CLEANING GENERAL		Test INT AU 19Dec2022		Priority 1 Emer	rgency	Abercrombie Student 01-100	Housing			Thu 19/01 18 days a	
	6770427	ę	9 6) (>	Ø		BUILDING		Test-StarRez-Intg-05122022		Priority 1 Emer	rgency	Abercromble Student 01-100	Housing			Tue 13/12 41 days a	



To review the details of a Work Request, select the **Work Request** number:

Ŗ	Maint	enance	Co	nso	le								SYDNE SYDNE	Ÿ 🕐 ★	(
Vor	k Request	s									4	Locate	🖞 Export 🗳 Opti	ons Report Prol	bl
C	ς Search by co	de, type, proced	dure, ed	quipme	nt, descripti	on, location, person	Quick Fi	ters 🗸 📑 Filters (3)	Refresh	Clear Group by: Status ~					
	Work Request	\$ Action	s			Problem Type PM Procedure		k Description iments	0	Priority	Location (Name)		Equipment Code Equipment Standard	Date to Perform Due Date	4.5
	Issued and	l In Process	(246)	~											
- (6770532	ð	Θ	0	0	FIRE SERVICES	Ter	2_Adding Account Code t nplates _T AXIA8593 :: Bulk Upload A		Priority 3 Planned	Services Building 01-100A			Fri 01/07/2022 17 days left	
	6770508	Ð	Θ	0	\odot	PM FIRE	Fir D1	e System <mark>Interf</mark> ace Testing 3	g, 12 Months,	3 - Scheduled	Susan Wakil Health Building XS-OSB		D18-XS-OSB-12001- 01 12001	Wed 01/02	
]	6770467	٢	Θ	0	\odot	CLEANING GENERAL	Tes	t INT AU 19Dec2022		Priority 1 Emergency	Abercrombie Student Housin 01-100	g		Thu 19/01 18 days ago	
]	6770427	٢	Θ	0	\odot	BUILDING	Tes	t-StarRez-Intg-05122022		Priority 1 Emergency	Abercromble Student Housin 01-100	g		Tue 13/12/2022 41 days ago	

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.

Sydney (2)	*
	Expa
Link New	w
	As
Cancel	ive

Location, Problem and Request Details – Contains the details of the Work Request:



🖉 Work Request		Sydney (ð ★	
Back to Requests Work Request: 6769323 (Issued and In Process) Clean Test				
Overview Documents and Activity			Expand	d A
✓ Location, Problem and Request Details		Link N	lew Ma	lap
Description				-
Clean Test				
				_//
Location	Problem	Request Details		
Site Code	Problem Type	Requested By:		
04	CLEANING GENERAL	LYNN MARGARET COOK		
Building Code	Work Team Code	Requestor's Phone #		
C12-02	GJK	123456		
Floor Code	Cost Type	Requestor's Email		
01	Nil Cost 🗸	lynn.cook@sydney.edu.au		
Room Code	Work Request Type	Date Requested		
101	R	12/12/2022 3:19 pm		
Problem Location	Priority	Date to Perform		
Problem Location	Priority 1 Emergency	12/12/2022 3:22 pm		
	 Priority 2 Urgent 	Due Date		
Latitude	O Drinrity 3 Diannari			

Work Request History – Contains the details of who has updated the Work Request at each update:

🤌 Work Request					😴 SYDNEY 🕐 ★
Back to Requests					
Vork Request: 6769323	(Issued and In Process)				
lean Test					
Overview Documents and	Activity				Expand
> Location, Problem and Requ	est Details				Link New Ma
> Trades					Ac
> Craftsperson Assignments	Un-Assign				Assij
> Work Logs					Ac
 Work Request History 					
Step Responded By	On	Workflow Step	Status	Step Status After	Comments
LCOO3008	12/12/2022 3:19 pm 12/12/2022 3:20 pm	Basic Edit and Approve	Requested Requested	None Approved	
LYNN MARGARET COOK	12/12/2022 3:20 pm	Edit and Approve Basic	Approved	None	
SYSTEM	12/12/2022 3:20 pm	Basic	Assigned to Work Order	None	
SYSTEM	12/12/2022 3:20 pm	Basic	Issued and In Process	None	

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	Add
Craftsperson Assignments Un-Assign	Assign
> Work Logs	Add
Work Request History	
> Parts	Add
> Tool Types	
> Tools	Add
> Other Costs	Add



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:

- 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.

✓ Costs			
Estimated Costs	Actual Costs	Chargeable Costs	
Estimated Cost of Labor 0.00	Actual Cost of Labour 0.00	Chargeable Cost of Labor 0.00	
Estimated Cost of Parts 0.00	Actual Cost of Parts 0.00	Chargeable Cost of Parts 0.00	
Estimated Cost of Tools 0.00	Actual Cost of Tools 0.00	Chargeable Cost of Tools 0.00	
Estimated Other Costs 0.00	Actual Other Costs 0.00	Chargeable Other Costs 0.00	
Estimated Total Cost 0.00	Actual Total Cost 0.00	Chargeable Total Cost 0.00	

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.



🔑 Work Request	😴 sydney 🕐 ★ 🛞
Back to Requests	
Work Request: 6769323 (Issued and In Process)	
Clean Test	
Overview Documents and Activity	Expand All
Location, Problem and Request Details	Link New Map
Update Work Request	
Cause Code	Scroll down
CAUSE	Scion down
Repair Type	
REPAIR TYPE ***	
Customer Notes History	
New Customer Notes	
Work Notes History	
New Work Notes	
	Cancel

Action – On Hold

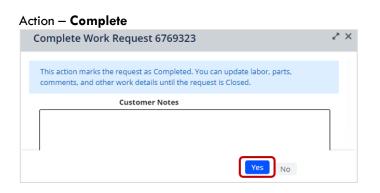
Hold Work Request 6769323	κ_{μ} \times
This action puts a request on hold while waiting for parts, the appropriate trade, or security access. You can stop or complete a request that is on hold.	
Hold for Parts Reason for Hold: Hold for Labor Hold for Access Hold for Quote	
Revised Due Date	_
Work Notes	
Yes No	

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

Action – Update



🤌 Work Request		SYDNEY	0 ★ 🛛
Clean Test			
Overview Checklist Equipment Documents and Act	ivity References		Expand All
✓ Location, Problem and Request Details			
Description			
Location	Problem	Request Details	
		Request Details	
SITE	PROBLEM TYPE		
BUILDING	×		
FLOOR ROOM	Work Request Type		
Problem Location	Requested V		
Latitude		Requested By:	
Longitude	ACCOUNT		
	N/A Y	Linked Work Requests	
		Requestor's Phone #	
Site Code		Requestor's Phone #	
Building Code	No Rating V	Requestor's Email	
	Problem Type		
Floor Code	riomen rype	Date Requested	
Room Code	Work Team Code	Primary Trade Required	
Problem Location	Cost Type	Date to Perform	
		Cancel	ve



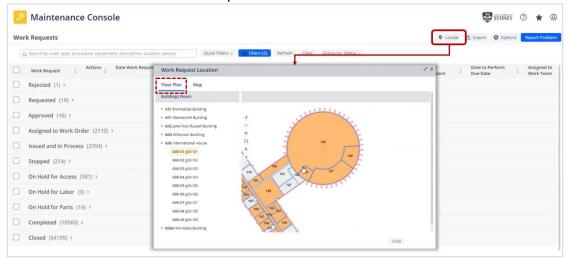


To locate work requests on a map, use the **Filters** and add the **Work Team** under the General section, and select **Site** field under Location & Organisation section. Then, click the **Apply** button.



🤌 Maintenance Console		SYDNEY 🔿 😘 🤇
Work Requests		Filters Clear Cancel
Q Search by code, type, procedure, equipment, description, location, person	Quick Filters - Refresh Clear Group by: Status	✓ General Work Type Both Work Request Type Vork Request Type Vork Request Type Vork Request Type Vork Ream Work Team Work Team Vork Team Profily Number Profily Number Profily Number Vork Team Vork Team

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:

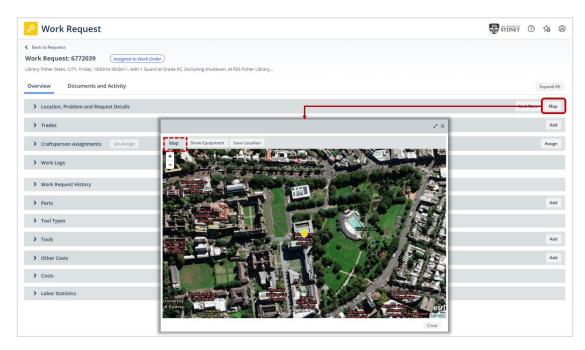


You can also select the **Map** tab to view a geographical location of work requests. Select a location and click the **Filter in Console** link to show work requests in that particular location:

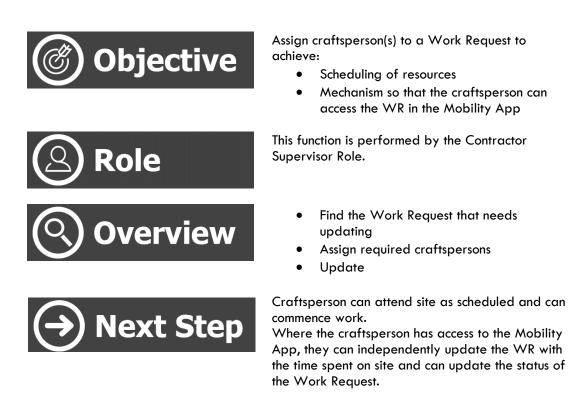
Maintenance Cons	ole	Sydney 🔿 🚖 🤅
Work Requests		Locate Export Cotions Report Problem
Q Search by code, type, procedure, equi	ment, description, location, person Quick Filters - Filters (2) Refresh Clear I	Group by Status 🖉
Work Request	Date Work Request Location	★ × t gard ⊕ Date to Perform Due Date ⊕ Work Team
Rejected (1) >	Floor Plan Map	
Requested (19) >	Map	
Approved (16) >		
Assigned to Work Order (211) > + + + + + + + + + + + + + + + + + +	g Name: International
Issued and In Process (3704)	Longitud	der 151,19284938
Stopped (214) >		Amount States
On Hold for Access (581) >		An other and a set of the set of
On Hold for Labor (3) >		
On Hold for Parts (14) >		
Completed (10565) >		est
Closed (54195) >		Close



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





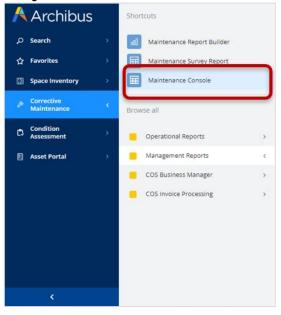
() Attention

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:

🖉 Maintenance Console	SYDNEY	0 \star 🛛
Work Requests	Filters Apply Clear Cano	el
Q Search by code, type, procedure, equipment, description, location, person Quick Filters V Filters Refresh Clear Group by: Status V	> General	
	✓ Request Status	
	Approved	
	Assigned to Work Order Issued	
	Stopped On Hold	
	Completed	0
	Escalated?	
	Returned?	

Select the required Work Request:



ß	Maintenance (Cons	ole														SYDNEY	0 to	0
Wor	k Requests														• Locate	1 Export	Options	Report P	roblem
C	χ Search by code, type, procedu	e, equip	ment, descrij	ption,	location, person		Quick Filters 🗸 📑	Filters (3) Refresh	Clear	Group	by: Stat	us v							
	Ready for Review of Payment		ork equest	¢	Problem Type	÷	Location (Name)	Work Description Comments	Actions				÷	Due Date	Problem Type PM Procedure	÷	Priority	¢	Equij Equij
	Issued and In Process (4	14) ~																	
	No	67	768153		SECURITY SERVICES PATROL SER	RVICE	Services Building 01-111	TEST 2	٢	Θ	Ø	⊘		15/11/2022	SECURITY SERVICES PAT	FROL SERVICE		3 Non-Urgen	3
	No	6	769022		PM SECURITY SERVICE	s	Nonspecific Building - Main Campus	Library Patrol, CITY, Tuesday, 20:00 to 09:00+1, w ith 1 Guard at Grade PC, In Semester excluding shu	ð	Θ	Ø	\odot		1/2/2023	PM SECURITY	SERVICES	3 - Sche	duled	

A pop-up pane will open, go to the **Craftsperson** section:

ß	Work Re	quest									SYDNEY	0	6 @
	k to Requests												
Work	k Request: 67	68153	(Issued and	d In Process									
Over	view Doc	uments and	Activity										Expand All
>	Location, Proble	em and Reque	st Details								L	ink New	Мар
>	Trades												Add
~	Craftsperson As	signments	Un-Assigr	n									Assign
	Craftsperson	Tradespers	on Name	Date Tradesperson Assigned	Time Tradesperson Assigned	Estim. Hours	Estimated Cost	Actual Cost of Labour	Work Type	On Site Hours	Assignment S	tatus	
	AALBANY	Alison Alba	ny	8/11/2022	12:00 am	2.00	0.00		Work	0.00	Active		í x
Tota	al records: 1					2.00							
>	Work Logs												Add
>	Work Request F	listory											
>	Parts												Add
>	Tool Types												
>	Tools												Add
>	Other Costs												Add
>	Costs												
											Cancel	Save	

Option 1 – Craftsperson assignment:

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

Assignmente Un.Assig									Ass
on Tradesperson Name	Date Tradesperson Assigned	Time Tradesperson Assigned	Estim. Hours	Estimated Cost	Actual Cost of Labour	Work Type	On Site Hours	Assignment Status	
Alison Albany	8/11/2022	12:00 am	2.00	0.00		Work	0.00	Active	í
	on Tradesperson Name	on Tradesperson Name Date Tradesperson Assigned	on Tradesperson Name Date Tradesperson Assigned Time Tradesperson Assigned	on Tradesperson Name Date Tradesperson Assigned Time Tradesperson Assigned Estim. Hours	Tradesperson Name Date Tradesperson Assigned Time Tradesperson Assigned Estim. Hours Estimated Cost Alson Albany 8/11/2022 12:00 am 2.00 0.00	In Tradesperson Name Date Tradesperson Assigned Time Tradesperson Assigned Estim. Hours Estimated Cost Actual Cost of Labour Alison Albany 8/11/2022 12:00 am 0.00	Instruction Tradesperson Name Date Tradesperson Assigned Time Tradesperson Assigned Estim. Hours Estimated Cost Actual Cost of Labour Work Type Alson Albany 8/11/2022 12:00 am 2.00 0.00 Work	Tradesperson Name Date Tradesperson Assigned Time Tradesperson Assigned Estim. Hours Estimated Cost Actual Cost of Labour Work Type On Site Hours Alson Albany 8/11/2022 1200 am 2.00 0.00 Work Type 0.00	Tradesperson Name Date Tradesperson Assigned Time Tradesperson Assigned Estim. Hours Estimated Cost Actual Cost of Labour Work Type On Site Hours Assignment Status Alson Abany 8/11/2022 12:00 am 2:00 0:00 Work 0.00 Active

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



Assign Craftsperson	2* ×
Craftsperson Code*	
	Scheduled Unscheduled
Estim. Hours	0.00
Work Type	Work
Assignment Status	Active
Estimated Cost	0.00
Actual Cost of Labour	
On Site Hours	0.00
	Save Cancel

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.

 Work Log 	50														Add
raftsperson	Date/Time Started	Date/Time Finished	Estim. Hours	Estimate Co:		Actual Hours	Overtime Hours	Doubletime Hours	On Site Hours	Actual Cost of Labour	Work Type	Additional Comments	Assignment Status	Craftsperson's Email	5
ALBANY 1	2/12/2022 7:00 am	12/12/2022 8:00 am		0.00	0.00	1.00			1.00	160.45	Work		Complete	alison.albany@sydney.ed	u.au
				0.00		1.00			1.00						

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

>	Trades										Add
~	Craftsperson Ass	ignments Un-Assign	1								Assign
	Craftsperson	Tradesperson Name	Date Tradesperson Assigned	Time Tradesperson Assigned	Estim. Hours	Estimated Cost	Actual Cost of Labour	Work Type	On Site Hours	Assignment Status	
	AALBANY	Alison Albany	8/11/2022	12:00 am	2.00	0.00		Work	0.00	Active	Ē
Total	records: 1				2.00						
>	Work Logs										Ad

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

Craftsperson Code*	AALBANY	
	Scheduled Unscheduled	
Date Tradesperson Assigned*	8/11/2022	
Time Tradesperson Assigned*	12:00	12:00 an
Estim. Hours	2.00	
Work Type	Work	~
Assignment Status	Active	~
Estimated Cost	0.00	
Actual Cost of Labour		
On Site Hours	0.00	



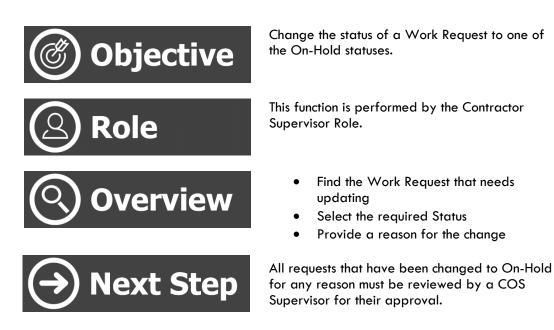


The optional fields aren't mandatory, and at this stage it is useful only to assign a craftsperson to the Work Request. However, before the Work Request is completed, the Actual Hours must be completed as it is used to calculate Actual Costs in the system. A \$0 value recorded in Actual Costs may result 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



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:

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- 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.

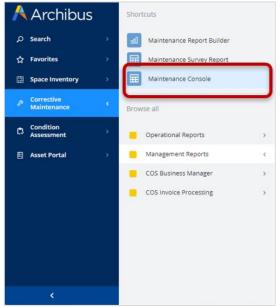


Where the COS Supervisor determines that the On-Hold status is **Not COS Approved**, there may be KPI penalties imposed.

It is important that you, the contractor, understands in what situation COS will accept a Work Request being put into an On-Hold status.



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:

rk Requests	Filters Apply Clear Cancel
C. Search by code, type, procedure, equipment, description, location, person Quick Filters	> General
	✓ Request Status
	Approved
	Equipment & PM Details
	Location & Organization
	> People
	> Date Range
	> Costs
	> Risk Scores

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:

ß	Mair	ntenance Con	sole								SYDNEY	o to @
Wor	k Reque	sts								• Locate	A Export Options	Report Problem
2	selected	Cancel Selection Hol	d Stop	Update Complete								
	Work Request	Actions	_	 Problem Type PM Procedure 	0	Work Description Comments	¢	Priority \$	Location (Name)	¢	Equipment Code Equipment Standard	Date to Perform
	Issued a	ind In Process (44) ~										
	6769023	C ⊖ Hold	00	PM SECURITY SERVICES		Library Fisher Static, CITY, Tuesday, 06:00 to 00, with 1 Guard at Grade PC, Excluding shutdown,	18:	3 - Scheduled	Fisher Library			Tue 31/01 2 days left
	6769022	ð 🖯	00	PM SECURITY SERVICES		Library Patrol, CITY, Tuesday, 20:00 to 09:00+ w ith 1 Guard at Grade PC, in Semester excludi shu		3 - Scheduled	Nonspecific Bu Campus	ilding - Main		Tue 31/01 2 days left
	6769021	9 O	0	PM SECURITY SERVICES		Concierge Services - F23 Level 4, CITY, Tuesd 0 8:30 to 16:30, with 1 Guard at Grade PC, Excluding	lay,	3 - Scheduled	Michael Spence	Building		Tue 31/01 2 days left

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.

Hold Work	Request 6769	023	~ ×
	uts a request on hold or complete a reque	d while waiting for parts, the appropriate trade, or security access. est that is on hold.	
	Reason for Hold: Revised Due Date	 Hold for Parts Hold for Labor Hold for Access Hold for Quote 	
	Revised Due Date		_
	Work Notes		
		Yes No	

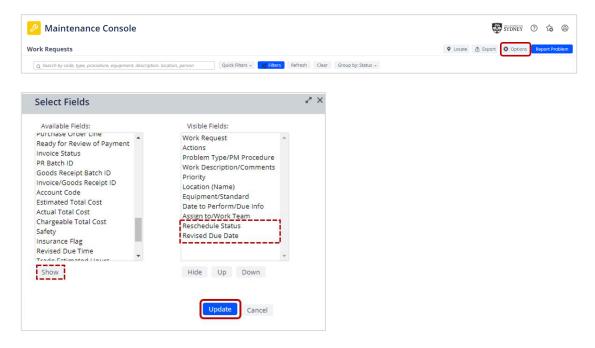
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The Maintenance Console will refresh, and the selected requests will now display in one of the **On-Hold** statuses:

ß	Mainte	enance Console	2							SYDNE	0	₲ @
Wo	rk Requests	5						• Locat	e 🖞 Export	Coption 1	ins Repo	ort Problem
	ς Search by cod	le, type, procedure, equipment,	, description, location, person	Quick Filters 🗸	📑 Filters (4)	Refresh Clea	Group by: Status 👻					
	Work Request	t \diamondsuit Reschedule Status \diamondsuit	Revised Due Date	¢	Problem Type PM Procedure	4	Work Description Comments	*	Priority	¢ Lo	cation (Na	me)
	Issued and	In Process (44) >										
	On Hold for	r Access (1) ~										
	6767816	Reschedule Required	00		SECURITY SERVICE	ES PATROL SERVIC	 Ad hoc Protective Services Officer x 1 fo GPOR5488 :: Changed Work Request t 		Priority 2 Ur		onspecific B Impus	Building - Mair
	On Hold for	r Parts (2) >										

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:



<u>Reschedule Status:</u>

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

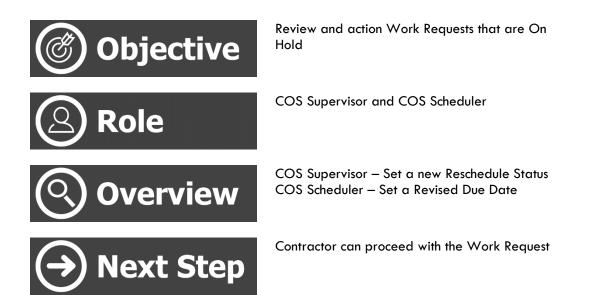
A COS Supervisor will review the request and will update the status to either: COS Approved Not COS Approved

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



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

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.

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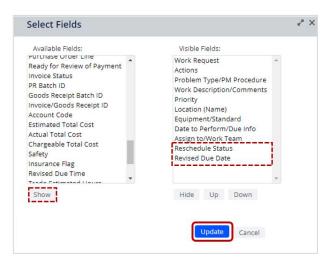
The COS Scheduler must perform their action before the COS Supervisor performs their actions.



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.





Navigate to the Maintenance Console frame:



A	Archibus		Shortcuts	
٩	Search		Maintenance Report Builder	
☆	Favorites		Maintenance Survey Report	
₩	Space Inventory	,	Maintenance Console	1
B	Corrective Maintenance	<	Browse all	
۵	Condition Assessment		Operational Reports	, .
8	Asset Portal		Management Reports	c:
			COS Business Manager	,
			COS Invoice Processing	>
	<			

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

Maintenance Console			SYDNEY	⊘ ★	0
Work Requests	• Locate	1 Export	Coptions	Report Pro	oblem
Q. Search by code, type, procedure, equipment, description, location, person Quick Riters Refresh Clear Group by: Status v					

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:

Work Requests		Filters Apply Clear Cancel
Q. Search by code, type, procedure, equipment, description, location, person Quick Filters V Filters Refre	sh Clear Group by: Status 🗸	General Request Status
		Approved Assigned to Work Order Issued Issued <tr< th=""></tr<>

From the resulting page, review any Work Requests that are On Hold:



Aintenance Console		9	sydney 🤈 🏠 🕲
Work Requests	• Locate	e 🗄 Export	Options Report Problem
Q Search by code, type, procedure, equipment, description, location, person Quick Filters v 🔚 Filters (d) Refresh Clear Group by: Status v			
Work Request	¢	Priority	Location (Name)
□ Issued and In Process (44) >			
On Hold for Access (1) ×			
6767816 Reschedule Required C SECURITY SERVICES PATROL SERVICE Ad hoc Protective Services Officer 1 for wet GPOR5488 :: Changed Work Request Priority L.	from 3	Priority 2 Urge	Nonspecific Building - Main Campus
On Hold for Parts (2) >			

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 requires.

<u>COS Supervisor</u>, 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:

🤌 Work Request		😴 SYDNEY (?) 😘 🕲
Back to Requests Work Requests 6767816 On Hold for Access Ad hoc Protective Services Officer x1 for wet weather inspection of Overview Documents and Activity	all teaching spaces to be completed Sunday 09 October 2022.	Espand All
 Location, Problem and Request Details 		Link New Map
Longitude Longitude School Code 2996 Department Code 2001	Status On Hold for Access Account Code ACCOUNT Reschedule Status Reschedule Status Reschedule Required CS Approved Not CIS Approved Revised Due Time Satisfaction Rating No Rating Satisfaction Notes	Work Request ID: 6767816 Work Order Number: 718683 Service Request ID: 2011307 Workflow Response required within 120 Minutes Completion required within 270 Minutes Workflow Steps: 00 VIDERVISOR 01 Status of Approved: Edit and Approve is required by COS SECURITY SUPERVISOR 01 status of Approved: Scheduling is required by COS SECURITY SUPERVISOR 01 status of Approved: Scheduling is required by COS SECURITY SUPERVISOR 01 status of Approved: Scheduling is required by COS SECURITY SUPERVISOR Request will be dispatched to COS SECURITY OPERATION
		Cancel

<u>COS Scheduler</u>, 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:



😕 Work Request		😴 SYDNEY 🕐 😘 🚇
Back to Requests Work Request: 6767816 On Hold for Access Ad hoc Protective Services Officer x 1 for wet weather inspection Overview Documents and Activity	n of all teaching spaces to be completed Sunday 09 October 2022.	Expand All
✓ Location, Problem and Request Details		Link New Map
Longitude Zangitude School Code 296 Department Code 2601	Status On Hold for Access Un Hold for Access On Hold for Access On Hold for Access On Hold for Quete Restrictule Required Restrictule Required C C C Sum Mon Tus. Wed Turu: Pri Sat 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 118 19 20 21 22 29 21 1 Todayy Close	Work Request ID: 6767816 Work Order Number: 71883 Service Request ID: 2011307 Workflow Response required within 120 Minutes Completion required within 120 Minutes Completion required within 120 Minutes Completion Steps: Service Security Security Security Security Security Security Security Security Security On status of Approved: Scheduling is required by COS SECURITY SUPERVISOR On status of Approved: Scheduling is required by COS SECURITY SUPERVISOR On status of Approved: Scheduling is required by COS SECURITY SUPERVISOR On status of Approved: Scheduling is required by COS SECURITY SUPERVISOR Request will be dispatched to COS SECURITY OPERATION
		Cancel

You will be prompted to provide a comment:

Return Work Request 6767816	~ ×
This action returns the request to prior status or a prior workflow step.	
Status: Issued and in Process	
Customer Facing Comments	
	ħ.
(Update Request Cancel

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







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.



A	Archibus		Shortcuts	
م	Search		dt] Maintenance Report Builder	
쇼	Favorites		Maintenance Survey Report	
8	Space Inventory	>	Maintenance Console	
Þ	Corrective Maintenance	¢	Browse all	
ß	Condition Assessment		Operational Reports	
B	Asset Portal		Management Reports	¢
			COS Business Manager	
			COS Invoice Processing	>
	<			

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:



😕 Maintenance Console	😴 SYDNEY 🕐 🚖 🚇
Work Requests	Filters Apply Clear Cancel
Q Search by code, type, procedure, equipment, description, location, person Quick Filters V Filters Refresh Clear Group by: Status V	> General
	✓ Request Status
	Approved Assimuted to Work Order Stopped O Grind Assimuted To Work Order Stopped O Grind Completed Escalated? Returned? Returned?
	> Equipment & PM Details
	> Location & Organization
	> People
	> Date Range
	> Costs
	> Risk Scores

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:

🤌 Maintenance Console		Sydney 🤊 🚖 🔕
Work Requests		♥ Locate ① Export ✿ Options Report Problem
Q	Quick Filters v 📑 Filters Refresh Clear Group by: Status v	
□ Work Request Actions Problem Type \$	Work Description Priority © Location (Name) Equipment Resched Comments © Code © Status	ule Revised Due Due Date Work Team Pr Date Code PI
□ Issued and In Process (1) ~		
□ 6769310 ← < ⊖ ⊘ ⊙ PEST CONTROL SERVICES	Please remove Phonty 2 Urgent John Woolley Building N/A possums. 02:5210	19/12/2022 GJK

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.

	t				SY.	DNEY 🕐	*
Back to Requests							
ork Request: 6769310	(Issued and In Process)						
ase remove possums.							
verview Documents a	and Activity						xpand A
	,						
> Location, Problem and Re	equest Details					Link New	Мар
> Trades							Add
> Craftsperson Assignment	ts Un-Assign						Assign
							Ado
> Work Logs							
> Work Logs							Aud
Work Request History Step Responded By	On	Workflow Step	Status	Step Status After	Comments		
✓ Work Request History	On 12/12/2022 10:39 am	Workflow Step Basic	Status Requested	Step Status After None	Comments		
✓ Work Request History itep Responded By					Comments issued to GJK		
✓ Work Request History tep Responded By YNN MARGARET COOK COO3008	12/12/2022 10:39 am	Basic	Requested	None			
✓ Work Request History tep Responded By YNN MARGARET COOK COO3008 YNN MARGARET COOK YNN MARGARET COOK	12/12/2022 10:39 am 12/12/2022 10:44 am	Basic Edit and Approve	Requested Requested	None Approved			
✓ Work Request History itep Responded By YNN MARGARET COOK	12/12/2022 10:39 am 12/12/2022 10:44 am 12/12/2022 10:44 am	Basic Edit and Approve Basic	Requested Requested Approved	None Approved None			
✓ Work Request History tep Responded By YNN MARGARET COOK COO3008 YNN MARGARET COOK YNN MARGARET COOK	12/12/2022 10:39 am 12/12/2022 10:44 am 12/12/2022 10:44 am 12/12/2022 10:46 am 12/12/2022 10:46 am 12/12/2022 11:03 am	Basic Edit and Approve Basic Basic	Requested Requested Approved Assigned to Work Order	None Approved None None	issued to GJK		
✓ Work Request History tep Responded By YNN MARGARET COOK COO3008 YNN MARGARET COOK YNN MARGARET COOK YNN MARGARET COOK	12/12/2022 10:39 am 12/12/2022 10:44 am 12/12/2022 10:44 am 12/12/2022 10:46 am 12/12/2022 10:46 am	Basic Edit and Approve Basic Basic Basic	Requested Requested Approved Assigned to Work Order Issued and In Process	None Approved None None None		verification	

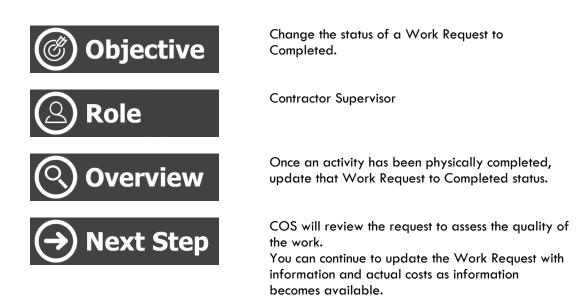


It is the Contractor's responsibility to resolve any issues identified by COS through the Verification process. Once resolved, the Work Request should be updated to **Completed** again so that it may be re-Verified.



10. Completed

10.1. Contractor – Complete WR



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



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.



Navigate to the Maintenance Console frame:



Archibus	5	Shortcuts
ပ Search		Maintenance Report Builder
☆ Favorites		Maintenance Survey Report
🔛 Space Inventory		Maintenance Console
Corrective Maintenance	¢	Browse all
Condition Assessment		Operational Reports
目 Asset Portal		Management Reports <
		COS Business Manager >
		COS Invoice Processing
<		

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

🤌 Maintenance Console			SYDNEY	0 \star	8
Work Requests	• Locate	1 Export	Coptions	Report P	Problem
Q. Search by code, type, procedure, equipment, description, location, person Quick Pilters Filters Refresh Clear Group by; Status -					

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:

k Requests			Filters Apply Clear Cancel
χ Search by code, type, procedure, equipment, description, location, person	Quick Filters V Filters Refe	resh Clear Group by: Status 🗸	 > General > Request Status
			Approved Assigned to Work Order Issued Stopped On Hold Completed Excalated? Returned?
			Reschedule Status
			 Location & Organization
			> People
			> Date Range
			> Costs



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

ß	Main	itenance Console											SYDNEY	0	ŵ	Ø
Wor	k Reque	sts									• Locate	▲ Export	Options	Repo	ort Prob	le
✓ 3	selected	Cancel Selection Hold Stop	Update Complete													
	Work Request	Ready for Review of Payment	Problem Type	Location (Name)	Work Description Comments	Actions				≎ Due Date	Problem Type PM Procedure	\$	Priority			E
	Issued a	nd In Process (993) ~														
✓	6770567	No	SECURITY SERVICES LOCK UNLOCK	Services Building	Test Red Highlight	٢	Θ	Ø		27/1/2023	SECURITY SER UNLOCK	VICES LOCK	Priorit	/ 1 Emerg	ency	
	6769023	No	PM SECURITY SERVICES	Fisher Library	Library Fisher Static, CITY, Tuesday, 06:00 to 18: 00. with 1 Guard at Grade PC, Excluding shutdown,	٢	Θ	Ø	0	Complete 2023	PM SECURITY	SERVICES	3 - Sch	eduled		
	6769022	No	PM SECURITY SERVICES	Nonspecific Building - Main Campus	Library Patrol, CITY, Tuesday, 20:00 to 09:00+1, w Ith 1 Guard at Grade PC, In Semester excluding shu	٢	Θ	Ø	\odot	1/2/2023	PM SECURITY	SERVICES	3 - Sch	eduled		
	6769021	No	PM SECURITY SERVICES	Michael Spence Building	Concierge Services - F23 Level 4, CITY, Tuesday, 0 8:30 to 16:30, with 1 Guard at Grade PC, Excluding	٢	Θ	Ø	\odot	1/2/2023	PM SECURITY	SERVICES	3 - Sch	eduled		

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

Complete Work Request	κ_{μ} \times
This action marks the request as Completed. You can update labor, parts, comments, and other work details until the request is Closed.	
Customer Notes	
Yes No	

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

×	main	cern	ance Console									4	SYDNEY	01	6
Nor	rk Reques	ts									• Locate	🗄 Export	Option:	Repor	t Proble
C	ς Search by α	ode, typ	oe, procedure, equipment, de	scription	n, location, person	Quick Filters 🗸 🧱	Filters (3) Refresh Cle	ar	Group by: Status 👻						
ו	Work Request	¢	Ready for Review of Payment	\$	Problem Type	\$ Location (Name)	Work Description Comments	1	Actions	\$ Due Date	Problem PM Proc		¢ Prior	ity	0
]	Complete	d (14	14) ~												
	6768258		No		PM BUS SERVICES	Nonspecific Building - Main Campus	December, Bus C - Camperdown Redfern Station to			1/1/2023	PM BU	S SERVICES	C	- Schedule	d

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





Add actual costs and other supporting information to a Work Request

Contractor Supervisor

Using the $\ensuremath{\textbf{Update}}$ function to add $\ensuremath{\textbf{Actual Costs}}$ to a Work Request.

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

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).



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.



Navigate to the Maintenance Console frame:



A	Archibus		Shortcuts
Q	Search		doll Maintenance Report Builder
쇼	Favorites		Maintenance Survey Report
#	Space Inventory		Maintenance Console
Þ	Corrective Maintenance	<	Browse all
۵	Condition Assessment		Operational Reports
B	Asset Portal		Management Reports
			COS Business Manager >
			COS Invoice Processing
	<		

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

🤌 Maintenance Console			SYDNEY	⊘ ★	0
Work Requests	• Locate	1 Export	Coptions	Report Pr	roblem
Q Search by code, type, procedure, equipment, description, location, person Quick Filters - Refresh Clear Group by: Status -					

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:

Anintenance Console	😴 SYDNEY 🕐 🏠 🚇
Work Requests	Filters Clear Cancel
Q Search by code, type, procedure, equipment, description, location, person Quick Filters v Filters Refresh Clear Group by: Status v	> General
	Request Status Approved Assigned to Work Order Stoeped Completed Completed Completed Returned? Equipment & PM Details Location & Organization People Date Range Costs Risk Scores



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

Wor	k Reques	its									• Locate	🗄 Exp	ort 🗘 Options	Rep	ort Proble
√ 3	selected	Cancel Selection Hold Stop	Update Complete												
	Work Request	Ready for Review of Payment	≎ Problem Type ≎	Location (Name)	Work Description Comments	Actions			3	Due Date	Problem Type PM Procedure	٥	Priority	¢	Equi Equi
	Issued an	nd In Process (44) ~													
	6769023	No	PM SECURITY SERVICES	Fisher Library	Library Fisher Static. CITY, Tuesday, 06:00 to 18: 00, with 1 Guard at Grade PC, Excluding shutdown,	Ð	Θ	0		1/2/2023 odate	PM SECURITY SE	RVICES	3 - Schedule	łd	
2	6769022	No	PM SECURITY SERVICES	Nonspecific Building - Main Campus	Library Patrol, CITY, Tuesday, 20:00 to 09:00+1, w ith 1 Guard at Grade PC, In Semester excluding shu	٩	Θ	0	9	1/2/2023	PM SECURITY SE	RVICES	3 - Scheduk	ed	
	6769021	No	PM SECURITY SERVICES	Michael Spence Building	Concierge Services - F23 Level 4, CITY, Tuesday, 0 8:30 to 16:30, with 1 Guard at Grade PC, Excluding	Ð	Θ	0	3	1/2/2023	PM SECURITY SE	RVICES	3 - Scheduk	d	

Select an Individual Request

Add costs into the relevant category:

🤌 Work Request	😨 SYDNEY 🔿 🏠 🥝
K Back to Requests	
Work Request: 6769023 (Issued and In Process)	
Library Fisher Static, CITY, Tuesday, 06:00 to 18:00, with 1 Guard at Grade PC, Excluding shutdown, at F03 Fisher Library	
Overview Documents and Activity	Expand All
> Location, Problem and Request Details	Link New Map
> Trades	Add
Craftsperson Assignments Un-Assign	Assign
> Work Logs	Add
> Work Request History	
> Parts	Add
> Tool Types	
> Tools	Add
> Other Costs	Add
> Costs	
> Labor Statistics	

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:



Work Request			SYDNET	0	20 (
Back to Requests					
ork Request: 6769023 (Issued and In Process)					
rary Fisher Static, CITY, Tuesday, 06:00 to 18:00, with 1 Guard at Grade PC, Excluding shutdown, at F03 Fisher Library					
verview Documents and Activity				F	Expand A
> Location, Problem and Request Details				Link New	Map
		And the second sec		_	
> Trades		Edit Craftsperson Assignment			~
Craftsperson Assignments Un-Assign		Craftsperson Code*	THOOTON		
Craftsperson Tradesperson Name Date Tradesperson Assigned Time Tradesperson Assigned	im. Hours Est		Scheduled 🔾 Unscheduled		
THOOTON Terry Hooton 4/1/2023 8:00 pm	8.00	Date Tradesperson Assigned*	4/1/2023		
	8.00	Time Tradesperson Assigned*	8:00		8:00
otal records: 1		Estim. Hours			
> Work Logs		Work Type			*
		Assignment Status Estimated Cost			~
		Actual Cost of Labour	0.00		
> Work Request History		On Site Hours	0.00		
Work Request History					

You can add a new Craftsperson by clicking the **Assign** button:

~	Craftsperson Ass	ignments Un-Assign	1			Assign Craftsperson		$\epsilon^* \times$	Assign
	Craftsperson	Tradesperson Name	Date Tradesperson Assigned	Time Tradesperson Assigned	Estim. Hours E				
	THOOTON	Terry Hooton	4/1/2023	8:00 pm	8.00	Craftsperson Code*			11 ×
							Scheduled Unscheduled		
Tot	I records: 1				8.00	Estim. Hours	0.00		
100	intecords. T					Work Type	Work	~	
>	Work Logs					Assignment Status	Active	~	Add
						Estimated Cost	0.00		
>	Work Request His	story				Actual Cost of Labour			
						On Site Hours	0.00	- 1	
>	Parts								Add
>	Tool Types						Save Ca	incel	

 ${\bf Parts}-{\bf For}$ use when assigning parts used. This will calculate actual costs based on the information loaded into the system background data.

✓ Parts	Add Part Z ×	Add
No records to display.	Part Code"	_
> Tool Types	Storage Location Code*	
> Tools	Quantity Estimated 0.000 Quantity Used	Add
> Other Costs	Estimated Cost 0.00 Actual Cost	Add
> Costs	·	
Labor Statistics	Close	

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:

Parts		
Tool Types	Add Other Cost	2 ×
Tools	Other Resource Type*	
Other Costs	Other Resource Description	
ecords to display.	Quantity Used	
Costs	Units	
Labor Statistics	Estimated Cost	
	A DATA A DATA	Save

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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:

Back to Requests					
ork Request:	: 6769023 (Issued and In Process)				
rary Fisher Static, (CITY, Tuesday, 06:00 to 18:00, with 1 Guard at Grade	PC, Excluding shutdown, at	F03 Fisher Library		
verview	Documents and Activity				Expand A
✓ Request Doo	cuments				
	Document 1 Drag-and-drop here	†	Document 2 Drag-and-drop here	†	
	Document 3 Drag-and-drop here	+	Floor Plan Redlines Drag-and-drop here	1 Indicate on Drawing	1
	L				2
✓ Additional D	Documents and Activity				Add Comments Add Docum
Documents and co	omments added here can be viewed on Archibus Ons	Site.			
Document	Activity		Date and Time Added	0	
	[SYSTEM] changed the status to Assigned	to Work Order	2/12/2022 8:38 am		
	[RGOV3410] changed the status to Issue	d and In Process	2/12/2022 8:46 am		

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



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:

😕 Maintenance Console	🐯 SYDNEY 🕐 😘 🔘
Update Work Requests	** ×
Work Request Add Craftspersons Add Parts Add Tools Add Other Costs	
Account Code	
Cause Code	
Repair Type	
	<varies></varies>
Work Notes	
	Update Request Forward Request Cancel

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.



e Work Requests						
Add Craftspersons	Add Parts Add Tools Add Other Costs					
Add Craftspersons	23	× Account Code				
Craftsperson Code*		Cause Code				
Actual Hours		Repair Type				
Doubletime Hours			<varies></varies>			
Overtime Hours		Work Notes				
c	 Add this time to each work request Divide this time evenly among each work request 			Upda	te Request Forward Requ	Jest
Date Started				opu	Tornara nega	C.N
Time Started						
Date Finished						
Time Finished						
Work Type	Nork 🗸					
Additional Comments						

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

🤌 Maintenance Co	nsole			18 B	SYDNEY	0	ŵ	0
Update Work Requests								,* ×
Work Request Add Craftspersons	Add Parts Add Tools Add Other Costs							
Add Other Cost	2 ×	Account Code						
Other Resource Type*		Cause Code Repair Type						
Other Resource Description		Work Notes	<varies></varies>					
Quantity Used Units								- le
Actual Cost			Up	odate Request	Forward Req	uest	Cance	<u>el</u>
L	Save Cancel							

10.3. Contractor – Ready for Payment







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:

Archibus 🔨	Shortcuts
,⊅ Search →	Maintenance Report Builder
☆ Favorites >	Maintenance Survey Report
🖽 Space Inventory >	Maintenance Console
Corrective Kaintenance K	Browse all
Condition Assessment	Operational Reports >
E Asset Portal	Management Reports <
	COS Business Manager >
	COS Invoice Processing
<	

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

🤌 Maintenance Console			SYDNEY	⊘ ★	0
Work Requests	• Locate	🛆 Export	Options	Report Pr	roblem
C. Search by code, type, procedure, equipment, description, location, person Quick Filters, Filters Refresh Clear Group by: Status v					

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.

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

< Requests	Filters Apply Clear Cancel
Search by code, type, procedure, equipment, description, location, person Quick Filters Filters Refresh Clear Group by: Status -	> General
	✓ Request Status
	Approved Assymet to Work Order Issued Stopped Completed Status Returned?
	Equipment & PM Details Location & Organization
	> People
	> Date Range

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

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

Available Fields:		Visible Fields:
Reschedule Status		Work Request
Revised Due Date		Ready for Review of Payment
Location		Problem Type
Supervisor		Location (Name)
Assigned to		Work Description/Comments
Building		Actions
Building Name		Due Date
Division		Problem Type/PM Procedure
Department		Priority
Date to Perform		Equipment/Standard
Time to Perform		Date to Perform/Due Info
Date Work Requested		Assign to/Work Team
Time Work Requested	*	
Show		Hide Up Down
		Update Cancel

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:

Work Request	0	Ready for Review of Payment	٥	Problem Type	\$ Location (Name)	Work Description Comments	0	Actions	0	Due Date	Problem Type PM Procedure	\$ Priority	0
Completed		4) ~											
6768258	-t	No		PM BUS SERVICES	Nonspecific Building - Main Campus	December, Bus C - Camperdown Redfern Station to		Update		1/1/2023	PM BUS SERVICES	3 - Scheduled	

In the Location, Problem and Request Details section, change to Ready for Review of Payment value to Yes and then click the Save button:



🤌 Work Request			SYDNE	Ÿ (?)	ô	0
Back to Requests						
Work Request: 6768258 Completed						
December, Bus C - Camperdown Redfern Station to Fisher Library, SWHB and A	TP, Monday to Friday, Excluding Public Holidays and Semester breaks					
✓ Location, Problem and Request Details			U	nk New	Мар	1
Equipment Details	Financial Details	Safety and Insurance				11
Equipment Code	Purchase Order Code	Safety		_		•
EQUIPMENT	0000348285		~	Scro	oll dow	/n
Equipment Standard	Purchase Order Line	Severe Weather Impact				
and and a construction of	1		~			
Equipment Condition						
0 - Not Entered 💙	PO Line Description	Insurance Flag				
	PM bus services	No	~			- 11
Priority Rating	Ready for Review of Payment					- 11
0 - Not Entered 🗸	No					- 11
Criticality	No					- 11
0 - Not Entered	Yes					- 11
	Disputed by CIS					
Equipment Risk Score	Goods Receipt Batch ID					
Adjusted Condition						
0 - Not Entered 🗸	Invoice/Goods Receipt ID					
			6			
			Cancel	Save		
				_		

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:

Work Request Code Re	eady for Review of Payment	Problem Type 🛛 🚽	Location -	Work Description	Due Date	Work Team Code	Reschedule Status	Revised Due Date
▼ Completed (1/1) □								
□ 5775508 Ye	25	FIRE	H70-04-4023	Sprinkler head in ceiling is leaking. Please re		FCS	CIS Approved	



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







COS Supervisor

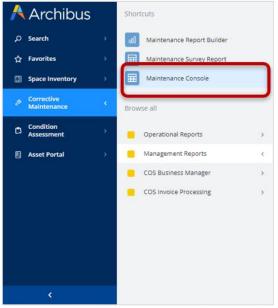
Work Requests that have been completed must be Verified by an appropriate person within COS. This function is primarily to acknowledge that the Work Request has been completed to a satisfactory standard.



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



Navigate to the Maintenance Console frame:



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

🤌 Maintenance Console			SYDNEY	0	• @
Work Requests	• Locate	1 Export	Options	Report	Problem
og search by code, type, procedure, equipment, description, location, person Quick Rilters Refresh Clear Group by: Status v					

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:

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😕 Maintenance Console	SYDNEY (?) 😘 (Q)
Work Requests	Filters Clear Cancel
Q, Search by code, type, procedure, equipment, description, location, person Quick Filters v Filters Refresh Clear Group by: Status v	> General
	✓ Request Status
	Approved Assigned to Work Order Bissued Stopped On Hold Complexed Escalates? Reschedule Status Equipment & PM Details > Location & Organization > People > Date Range > Costs > Risk Scores

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:

ß	Maint	ena	ance Console							SYDNEY () to @
Wor	k Reques	s							• Locate	🗄 Export 🗳 Options	Report Problem
× 2	selected	Cancel	Selection Update Verify Clo	ose							
	Work Request	0	Reschedule Status	Problem Type	Location (Name)	Work Description Comments	Actions	0 Due Date	Work Team Code	Problem Type PM Procedure	© Priority
	Complete	d (76	4) ~								
	6770449		N/A	GROUNDS EXTERNAL SIGNAGE	University Garage 01-	Test Verified			MOORE & MOORE	GROUNDS EXTERNAL SIGNAGE	Prior
	6769025		N/A	PM SECURITY SERVICES	Law School Building	Library Law, CITY, Tuesday, 20:00 to 09:00+1, with 1 Guard at Grade PC, In Semester excluding shutdo	Verify	1/2/2023	ACES	PM SECURITY SERVICE	s <u>3-s</u> c
	6769024		N/A	PM SECURITY SERVICES	Fisher Library	Library Fisher Static, CITY, Tuesday, 18:00 to 06: 00+1, with 1 Guard at Grade PC, Excluding shutdown	0 🖻 0	1/2/2023	ACES	PM SECURITY SERVICE	s <u>3-s</u> c

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:

Verify Work Requ	uest		"× ×
Customer Facing Com	nents		
			li
	Confirm	Return Incomplete	

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.

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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 <u>and</u> 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

Exceptions



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.



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.



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:

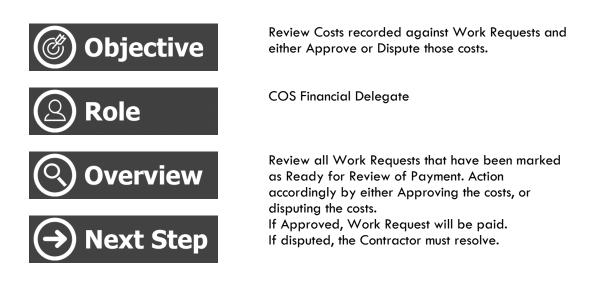


Available Fields:		Visible Fields:	
Location	-	Work Request	
Supervisor		Ready for Review of Payment	
Assigned to		Problem Type	
Building		Location (Name)	
Building Name		Work Description/Comments	
Division		Actions	
Department		Priority	
Date to Perform		Due Date	
Time to Perform		Work Team Code	
Date Work Requested		Reschedule Status	
Time Work Requested		Revised Due Date	
Date Work Completed		Problem Type/PM Procedure	
Equipment Code	*	Equipment/Standard 👻	
Show		Hide Up Down	

Only Work Requests that have a **Yes** value in the **Ready for Review of Payment** field should be **Verified**:

No	rk Requests	5						Q L	ocate 🖞 Export	t 🌣 Options	Report Proble
(ς Search by cod	le, type, procedure, equipment	t, description, location, person	Quick Filt	ers 🗸 📑 Filters (3)	Refresh Clear	Group by: Status ~				
	Work Request	Ready for Review of Payment	Problem Type	Location (Name)	Work Description Comments	Actions	Priority	Due Date [‡]	Work Team Code	Reschedule Status	Revised Du Date
	Completed	(764) ~									
	6770449	Yes	GROUNDS EXTERNAL SIGNAGE	University Garage 01-	Test Verified	ē	Priority 3 Planne	ed	MOORE & MOORE	N/A	
	6769025	Yes	PM SECURITY SERVICES	Law School Building	Library Law, CITY, Tuesday, 20:00 to 09:00+1, with 1 Guard at Grade PC, In Semester excluding shutdo	Verify	(3 - Scheduled)	1/2/2023	ACES	N/A	
	6769024	Yes	PM SECURITY SERVICES	Fisher Library	Library Fisher Static, CITY, Tuesday, 18:00 to 06: 00+1, with 1 Guard at Grade PC, Excluding shutdown	0° = 0	3 - Scheduled	1/2/2023	ACES	N/A	

10.6. COS Manager – Approve/Dispute Payment







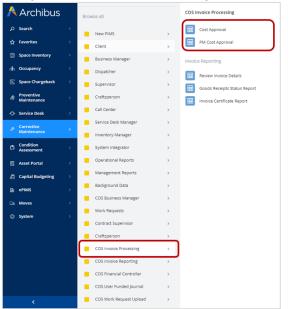
Be aware that there are 2 tools available:

- 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.



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:



Filter	Show Clear																
	Work Request C	ode From				Wor	rk Request Cod	еТо					Invoice Stat	us Not Proces	sed	~	
	F	equested Date	Range 🗸				F	rom						Го			
	Prim	ary Trade		le			Work Team C	ode		li.			Problem Ty	pe		le	
	Buildin	g Precinct															
Invoices	Customize Colu	mns															
4 4 P	age 0/0 🕨	Showing 0 of	fo														
Request Code	Primary Trade	Work Team Code	Cost Type	Estimated Labor Hours	Actual Labor Hours	On Site Hours	Estimated Labor Cost	Actual Labor Cost	Chargeable Cost of Labor	Estimated Parts Cost	Actual Parts Cost	Chargeable Cost of Parts	Estimated Tools Cost	Actual Tools Cost	Chargeable Cost of Tools	Estimated Other Cost	Acti Oth Cos



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:

Filter	Show Clear					
	Work Request Code From		Work Request Code To	Invoice Status	Not Processed	~
	Requested	Date Range 🗸	From	То		

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

Filter Sho	ow Clear																
	Work Request Cod	e From				Wor	k Request Code	То					Invoice Statu	Not Proces	sed	~	
	Req	uested Date Ran	ge 🗸				Fr	om					Т	0			
	Priman	y Trade		h			Work Team Co	ode		h			Problem Typ	e		h	
	Building P	Precinct															
Invoices	Customize Colum	ns															
4 4 Page	1 /86 🕨 🕨	Showing 1-10	of 859														
Request P Code		Vork Team Code	Cost Type	Estimated Labor Hours	Actual Labor Hours	On Site Hours	Estimated Labor Cost	Actual Labor Cost	Chargeable Cost of Labor	Estimated Parts Cost	Actual Parts Cost	Chargeable Cost of Parts	Estimated Tools Cost	Actual Tools Cost	Chargeable Cost of Tools	Estimated Other Cost	Actua Other Cost

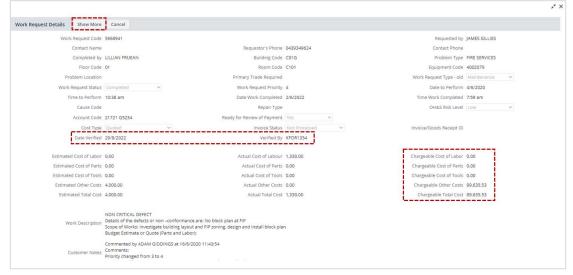
Double-clicking on the **Work Request** number will open a pop-up frame that provides all the Cost information for that Work Request:



	nvoices	kes Customize Columns																
1 4 Page 1/86 > > Showing 1-10 of 859																		
_	Request Code	Primary Trade	Work Team Code	Cost Type	Estimated Labor	Actual Labor	On Site Hours	Estimated Labor	Actual Labor Gest	Chargeable Cost	Estimated Parts	Actual Parts	Chargeable Cost	Estimated Tools	Actual Tools	Chargeable Cost	Estimated Other	Actual Other Cent
1	5968941		TRIPLE M	Quoted	0	14	14	\$0.00	\$1,330.00	\$0.00	\$0.00	50.00	\$0.00	\$0.00	\$0.00	\$0.00	\$4,000.00	\$0.00
z	6059449		мсм	Schedule of	0	2	0	50.00	\$130.00	\$130.00	50.00	50.00	50.00	\$0.00	50.00	\$0.00	50.00	50.00
3	6071428		TRIPLE M	Quoted	0	0	0	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$6,000.00	\$0.00

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 \mathbf{x} icon on the upper right corner of the frame to return to the Cost Approval view.

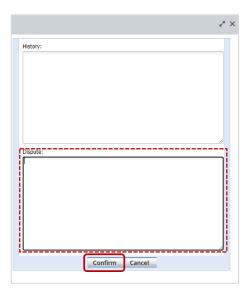
Scroll to the Invoice Status column.

	Invoices	Customize	Columns						
Other Total Total Total Purchase Order Code Invoice Status Dispute Notes PR	4 4 P	age 1 /86	🕨 📔 Sho	owing 1-10 of 85	9				
					Purchase Order Code	Invoice Status		Dispute Notes	PR Bat
S89,635.53 S4,000.00 S1,330.00 S89,635.53 00000335325-1 [] Not Processed [A][D] []					0000335325-1 []	Not Processed	[A][D]	L	

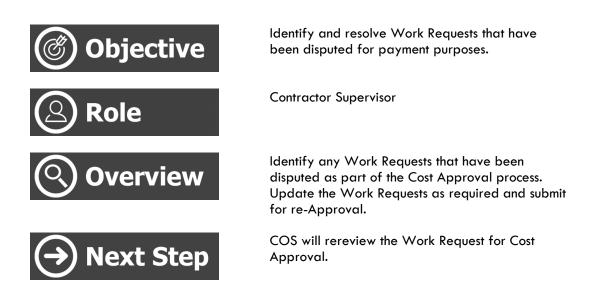
Select either: **A** = Approve **D** = Dispute

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



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:

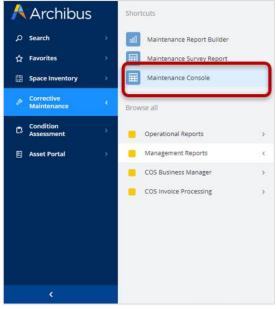
Approve – Agreeing with the costs, when enables the Work Request to be included on the next scheduled Invoice Certificate.

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:



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

🤌 Maintenance Console			SYDNEY	? ★ ®
Work Requests		♥ Locate	🗄 Export 🗳 Options	Report Problem
g Search by code, type, procedure, equipment, description, location, person	Quick Filters - Filters Refresh Clear Group	ip by: Status v		

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:

🤌 Maintenance Console			SYDNEY	0 to
Work Requests			Filters Apply Clear Can	icel
Q. Search by code, type, procedure, equipment, description, location, person	Quick Filters - Refresh 0	lear Group by: Status 🗸	> General	
			✓ Request Status	
			Approved Assigned to Work Order Issued Stopped On Hold Completed Escalated? Returned?	
			> Equipment & PM Details	
			> Location & Organization	
			> People	
			> Date Range	
			> Costs	
			> Risk Scores	



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**.

ß	Mainte	enance (Console										😴 SY	ONEY ?	6
Wor	k Requests											♥ Locate (Export	Options R	eport Problen
0	χ Search by cod	e, type, procedu	re, equipment, descriptio	n, location, person	Quick Filter	rs 👻 📑 Filters (3) Refresh Cle	ar Group	by: Status 🗸						
	Work 👙 Request	Invoice Status 🗘	Ready for Review 👙 of Payment	Problem Type	Location (Name) $\hat{\Rightarrow}$	Work Description [©] Comments	Actions	¢	Priority	¢	Due Date	Work Team Code	Reschedule Status	Revised Due Date	Problem Problem PM P
	Completed	(144) ~													
	6768162	Approved	Yes	SECURITY SERVICES PATROL SERVICE	Services Building 01-129	TTT123 Uverified			Priority 1 Err	ergency	9/11/2022	ACES	N/A		SE SE SE
	6768287	Approved	Yes	GROUNDS EXTERNAL SIGNAGE	University Garage 01-	External Sign Urified			Priority 3 Pla	nned		MOORE & MOORE	N/A		GF
	6768258	Disputed by CIS	No	PM BUS SERVICES	Nonspecific Building - Main Campus	December, Bus C - Camperdown Redfern Station to Verified	E Vp	date	3 - Schedule		1/1/2023	BIG BUS	N/A		PN
	6765667	Not Processed	Yes	ELECTRONIC SECURITY	Aeronautical Engineering Building 01-N121	J11 L1 N121 Roller Shutter Reed Switch has chan	Ø [*]		Priority 3 Pla	nned	14/11/202	2 FREDON SECURITY	N/A		EL SE

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:

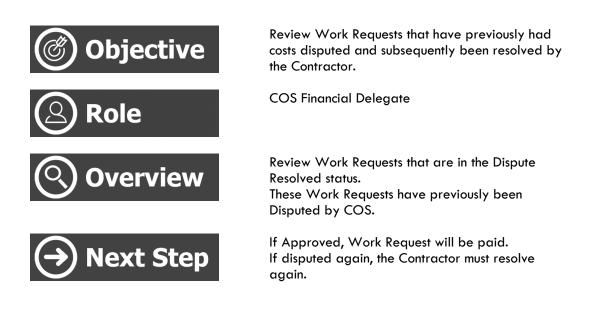
- 1. Ready for Review of Payment = Yes
- 2. Invoice Status = **Dispute Resolved**
- 3. Click the Save button to lock in the changes



🖉 Work Request			SYDNEY 🕜 to
Back to Requests			
Vork Request: 6768258 Completed			
ecember, Bus C - Camperdown Redfern Station to Fisher Library, St	WHB and ATP, Monday to Friday, Excluding Public Holidays and Semester breaks		
Overview Documents and Activity			Expand A
✓ Location, Problem and Request Details			Link New Map
quipment Details	Financial Details	Safety and Insurance	
Equipment Code	Purchase Order Code	Safety	
EQUIPMENT	0000348285		•
quipment Standard	Purchase Order Line	Severe Weather Impact	Scroll do
	1	No	~
Condition	PO Line Description	Insurance Flag	
	PM bus services	No	~
riority Rating	Ready for Review of Payment		
) - Not Entered 🗸 🗸	No V		
riticality	No		
) - Not Entered 🗸	Yes		
	Invoice Status		
quipment Risk Score	Disputed by CIS 🗸		
	Disputed by Contractor		
	Dispute Resolved Disputed by CIS		

The Work Request will now be available for the COS Representative to re-review.

10.8. COS Manager – Review Dispute Resolved WRs





Be aware that there are 2 tools available:

Version 2.1 February 2023 Work Request Management - User Guide

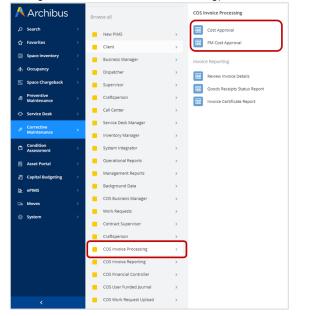


- Cost Approval Only On-Demand Work Requests are displayed here
- PM Cost Approval Only PM Work Requests are displayed here

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.



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



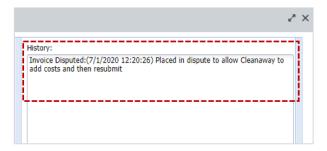
Review the displayed Work Requests in the **Dispute Resolved** status:

· ·													C			57	
	Work Request	Code From				W	ork Request Cod	е То					Invoice Sta	Dispute	Resolved	<u> </u>	
		Requested Date	Range 🛩				F	rom						То			
	Pri	mary Trade		le			Work Team C	lode		le			Problem T	ype		le	
	Build	ing Precinct															
Invoices	Customize Co	lumns															
14 4 1	Page 0/0 🕨	H Showing 0 of	fO														
Request	Primary Trade	Work Team Code	Cost Type	Estimated Labor Hours	Actual Labor Hours	On Site Hours	Estimated Labor Cost	Actual Labor Cost	Chargeable Cost of Labor	Estimated Parts Cost	Actual Parts Cost	Chargeable Cost of Parts	Estimated Tools Cost	Actual Tools Cost	Chargeable Cost of Tools	Estimated Other Cost	

Scroll to the **Dispute Notes** column to determine why the request was previously disputed. Click on [..] :

Invoices	Customia	e Columns							
14 4 F	age 1 /2	N Sho	owing 1-10 of 20						
Chargeable Other Cost	Estimated Total Cost	Actual Total Cost	Chargeable Total Cost	Purchase Order Code	•	Invoice Status		Dispute Notes	PR Batc
\$367.05	\$0.00	\$367.05	\$367.05	0-UNDER5K-1	1.1	Dispute Resolved	[A][D]	Invoice Disputed (7/1/2020 []	





Double-click into the Work Request to see if the required changes have been made:

Invoices	Customize Colur	nns	
I II I I Pag	e 1/2 🕨 🕨	Showing 1-10 of 2	0
Request	Primary Trade	Work Team	Cost Type
1 5798384	CLEANAWAY	CLEANAWAY	Schedule of

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.

rgeable I	Purchase Order Code	Invoice Status	Dispute Notes	Р
7.05	0-UNDER5K-1 []	Dispute Resolved [A][D]	Invoice Disputed:(7/1/2020 []	



11. Close

11.1. COS Finance Officer – Generate Invoice Certificates

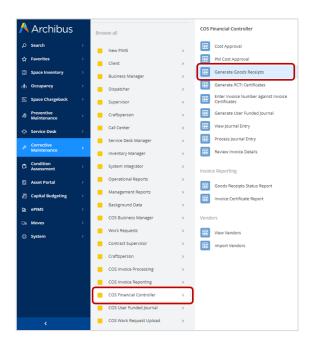


Every month invoice certificates are generated and dispatched via email to contractors so that they can submit a tax invoice to COS for payment. Each invoice certificate is a summary of all work requests that COS has approved for payment and that have not been included on a previous invoice certificate.



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.

ß	Generate G	oods Receipts				,	SYDNEY 🕜	ò	0
Gene	rate Goods Receipts	Generate PR Import Generate GR Import							
	Work Team Code	Email Address	Email CC	Vendor ID	Under \$5k Pending PR	Under \$5k Awaiting PO	PM Pending GR	≎ Re GF	eactin R
	4FOLD	admin@4fold.com.au	cis.facilities@sydney.edu.au	0000110902	1	0	0	0	
2	ACES	jvalendez@acesecurity.com.au,finance@acesecur	it security.finance@sydney.edu.au	0000080866	3	0	0	9	
	ACTIVE FLOOR SYS	claudia@activefloors.com.au	cis.facilities@sydney.edu.au	0000097742	0	0	0	0	
	AFP	accountsreceivable@ausfg.com,amenon@ausfg.c	om cis.facilities@sydney.edu.au	0000079853	0	0	0	0	
2	AG COOMBS	accountsnsw@agcoombs.com.au	cis.facilities@sydney.edu.au	0000137880	0	0	0	0	
1	AIRMASTER	uos@airmaster.com.au	cis.facilities@sydney.edu.au	0000156213	2	0	1	0	
	AIRMASTER FUME	uos@airmaster.com.au	cis.facilities@sydney.edu.au	0000156213	0	0	0	0	
	APEX LOCKSMITHS	accounts@apexlocksmiths.com.au	security.finance@sydney.edu.au	072328	0	0	0	0	

11.2. Contractor – Invoice Certificates/Tax Invoices





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.



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:

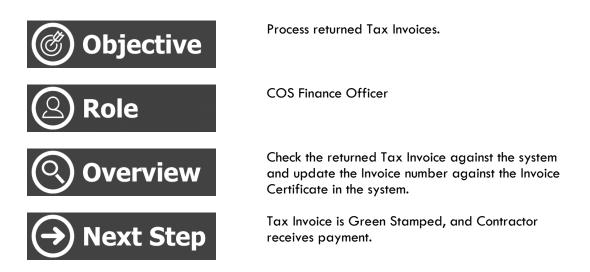
- 1. Create a Tax Invoice for the amount shown on the Invoice Certificate (1 invoice per certificate).
- 2. Ensure that the Tax Invoice includes the Invoice Certificate Reference Number.
- 3. Ensure that the Tax Invoice complies with any other statutory requirements.
- 4. Return the Tax Invoice and the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

Here is a sample Invoice Certificate:

	SYDN:	ĔΥ	Work (USYD009	Reque	ests)200409)			
Work Request	Building Code	Work Type	Cost Type	Purchase Order Code	Chargeable Labour Cost	Chargeable Parts Cost	Chargeable Tools Cost	Chargeable Other Cost	Chargeable Total Cost
907338	000-0102	Preventive	Schedule of Rates By Role	0000273698	\$0.00	\$9,680.00	\$0.00	\$0.00	\$9,680.00
907339	000-0102	Preventive	Schedule of Rates By Role	0000273698	\$0.00	\$7,920.00	\$0.00	\$0.00	\$7,920.00
907340	000-0102	Preventive	Schedule of Rates By Role	0000273698	\$0.00	\$15,136.00	\$0.00	\$0.00	\$15,136.00
907341	000-13	Preventive	Schedule of Rates By Role	0000273698	\$0.00	\$14,520.00	\$0.00	\$0.00	\$14,520.00
5907342	000-13	Preventive	Schedule of Rates By Role	0000273698	\$0.00	\$5,760.00	\$0.00	\$0.00	\$5,760.00
907343	000-05	Preventive	Schedule of Rates By Role	0000273698	\$0.00	\$6,776.00	\$0.00	\$0.00	\$6,776.00
				Total	\$0.00	\$59,792.00	\$0.00	\$0.00	\$59,792.00
								L.	
Purchase Order Code	Descrip	tion			Charge Total C				
000273698	THE BLO	niconnacadada)	NANG DE SAN DE LA SECONDA DE SAN	Right The last of	\$59,7	792.00			



11.3. COS Finance Officer – Process Tax Invoices



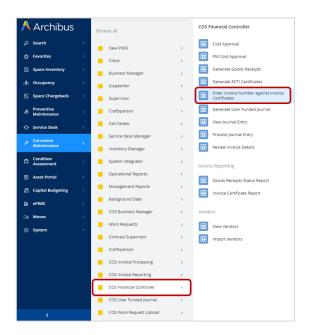
Contractors must return their invoice certificates to COS along with a tax invoice for the amount shown on the invoice certificate (All amounts shown on an invoice certificates are exclusive of GST).

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.



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:

mber against Invo	oice Certificates		SYDNEY 🔿	ŵ
	Primary Trade	Required clear		
	Result	s per Page 🖲 10 🔿 25 🔿 50 🔿 All		
ing 1-5 of 5 Save				
Total Chargeable Cost	Invoice Number	1		
\$113,290.00				
\$399.00				
\$6,805.99				
\$85.00				
\$240.00				
	Total Chargeable Cost \$113,290.00 \$399.00 \$6,805.99 \$85.00	ing 1-5 of 5 Save Total Chargeable Cost Invoice Number 513,280 00 5396 00 5365 09 585 00	Total Chargesble Cost Invoice Number 513, 20, 0.0 5390, 00 5,00, 05 5390, 00 5,00, 05 5390, 00 5,00, 05 5390, 00	Total Chargesbic Cost Involos Number 513200.00 5390.00 5390.00 60.005 550.00 60.005

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



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



To close Work Requests





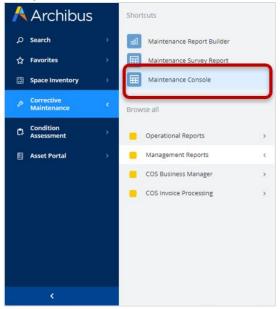
COS Finance Officer

To close Work Requests that have undergone the invoicing process.

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



Navigate to the Maintenance Console frame:



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

🤌 Maintenance Console		😴 Sydney 🔿 ★ 🛞
Work Requests		🕈 Locate 🏦 Export 🏘 Options Report Problem
Q Search by code, type, procedure, equipment, description, location, person	Quick Filters 🗸 📻 Filters Refresh Clear Group by: Status 🗸	

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:



Anintenance Console	👹 sydney 🧷 🏠 🔘
Work Requests	Filters Apply Clear Cancel
Q Search by code. type, procedure, equipment, description, location, person Quick Filters Refresh Clear Group by: Status -	> General
	✓ Request Status
	Approved Assigned to Work Order Assigned to Work Order Stopped On On Hold Completed Status Returned?
	> Equipment & PM Details
	> Location & Organization
	> People
	> Date Range
	> Costs
	> Risk Scores

From the resulting page, ensure that you have the **Goods Receipt Batch ID** and **Invoice/Goods Receipt ID** field displayed:

Available Fields:		Visible Fields:	
Ready for Review of Payme	nt 🔺	Goods Receipt Batch ID	
Location		Invoice/Goods Receipt ID	
Supervisor		Invoice Status	
Assigned to		Work Request	
Building		Problem Type	
Building Name		Location (Name)	
Division		Work Description/Comments	
Department		Actions	
Date to Perform		Priority	
Time to Perform		Due Date	
Date Work Requested		Work Team Code	
Time Work Requested		Reschedule Status	
Date Work Completed	+	Revised Due Date 👻	
Show		Hide Up Down	
511011		inde op bown	

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.



Nor	rk Requests								🕈 Locate 👌 Export 🛱 C	ptions Report Problem
	ן Search by code, type, procedure, equipment, de	scription, location, pe	rson	Quick Filters	Fliters (1) Ref	fresh Clear	Group by: State	v ZL		
	Goods Receipt Batch ID	Invoice/Goods Receipt ID	Invoice Status 🗘	Work \Diamond Request	Problem Type	Location (Name) $\stackrel{\bigcirc}{\Rightarrow}$	Work Description [⊕] Comments	Actions	Reschedule Revised ↓ Status ↓ Due Date [↓]	Priority
	ARCHIBU5_0000317752_20211130T183113903	RC171373	Approved	5853418	PM MECHANICAL SERVICE	Education Building 04-409	TMI-2069-PE- 3007 VRV Split indoor single FCU, 1 Mo nths	Close	N/A	3 - Scheduled
	ARCHIBUS_0000334046_20210901T091859457	RC153855	Approved	5811281	PLUMBING SERVICES	Business School Codrington Building 01-110	Blocked toilet reported. On behalf of delivery team	ē	N/A	Priority 2 Urgent
	USYDGOFREDON20200831	105-20090065	Approved	5918352	MECHANICAL SERVICES	J.D. Stewart Building	Attend Site To Investigate on-going Chiller Iss OMOH2821 :: Changed Work Request Priority from 3 t	Ē	NA	Priority 2 Urgent
	USYD00BROADSPECTRUM20200630	09140401	Approved	5914614	MECHANICAL SERVICES	Centre for Carbon Water and Food 01-112	The air conditioning in the Plant Physiology La	Ē	N/A	Priority 2 Urgent

Close	e Work Request 5853418	e's	×
it.	action archives the request and prevents any further updates to e this work request?	D	
Close	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



Install and configure the Archibus Mobile App

Craftsperson

Install the application Launch the application Configure the application for first use

Use the App, create a Work Request





Step	Image
 Download and install the Archibus Mobile Client App Version 4.0 onto your smart phone 	3:19 • Bearch C arcchibus C ancel C
2. Launch the application from your smart phone	Il Telstra Il 2:34 pm 94% FaceTime Maps Photos Camera Notes Weather Reminders Ciock Utilities Lifestyle Books Health Lifestyle Lifestyle Social Social Files Veather Dooks Health Camera Dooks Dooks Social Calendar Contacts Dooks Social
 Enter the Web Central URL: <u>https://campusassist.sydney.edu.au/archibus/</u> Select Connect 	It Telstra 12:53 pm 92% Archibus Web Central URL* https://campusassist-uat.sydney.edu.au/archibus Connect Recent URLs



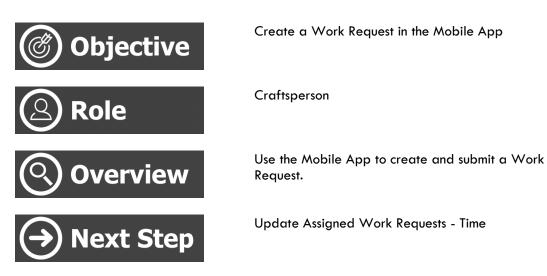
 5. Enter your Unikey username 6. Enter your Unikey password 7. Select Register Device Note: Please contact the ICT Helpdesk on (02) 9351 2000 if you do not have your unikey password. 	Il Telstra 92% Archibus X Username * Vsername (upper case) Password * Password (case-sensitive) Register Device Register Device
 Your device will register, and you'll be logged into the App. 	Archibus *
Next time you launch the app, these settings will be retained.	Username * UNIKEY & Password * ***** & Register Device
 Select the cog wheel from the top right of screen 	It Telstra 12:54 pm 92% Archibus Asset & Equipment Survey Assessment Maintenance



	📶 Telstra 🗢	12:54 pm	92% 🔲
10. Check the details displaying in the User section.	K Back	User	
To change users on a shared service, log out of the App here.	Registered User Employee ID	USERNAME USERNAME	
Note: Do Not login to multiple devices with the same username. This will result in application errors when you	Email Phone	name.name@sydney.edu.au	u
attempt to do anything.	Building		
	Room		
	Division		
	Department		
		Log Out	
11. Select the Maintenance module from the menu	Archi		92% 💼
		Equipment Survey	P
	Mainter	XX	
 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. 	ull Telstra 🗢 < Apps	12:65 pm	92% 🗩 + s 🛛 🕈
Once completed, the App is ready for use.			
		14	
		10	
		Downloading	



12.2. Create a Work Request



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.



	Step	Image
	Launch the Archibus Mobile App Select the Maintenance module from the menu	It Telstra Archibus Asset & Equipment Survey Assessment Maintenance
3.	Synchronise the App	Ill Telstra 11:16 am 100% ≠ < Apps ✓
4.	Select the My Requests button , ensure that you are in the My Requests section.	

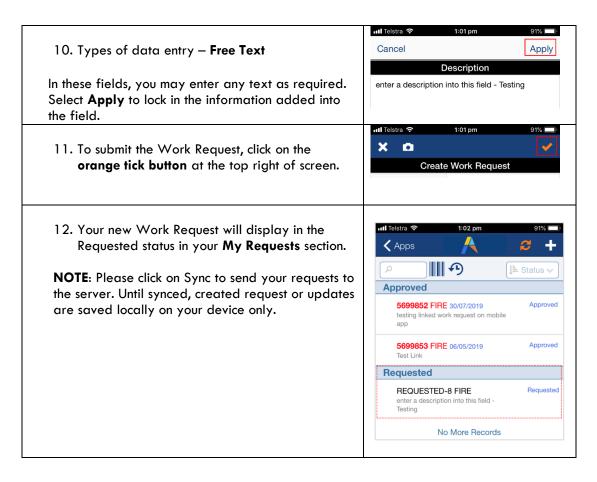


	내 Telstra 🗢	12:59 pm	91% 🔲)
	🗙 Apps	A	# +
		¶ ∯	Status
	Approved		
	5699852 FIRE testing linked wo app	30/07/2019 rk request on mobile	Approved
	5699853 FIRE Test Link	06/05/2019	Approved
	My Ro Issue	~	0
		My Requests	
 To create a new Work Request, select the white plus button located at the top right of screen. 	<pre>Apps</pre>		Status
6. Mandatory fields that must be completed are:	ull Telstra 奈	12:59 pm	91% 💷 '
	Creat	e Work Reques	22/08/2019
Building	Requestor	USERNAME	
Floor Code (if applicable)Problem Type	Phone	OSERITABLE	
Cause Code (if known)	Email	name.name@syd	ney.edu.au
	School Code		
	Department Code		
	Site		
	Building		⊗ >
	Floor		⊗ >
	Room		⊗ >
	Problem Location		- ·
	Problem Type		⊗ >
	Cause Code		⊗ >
			*

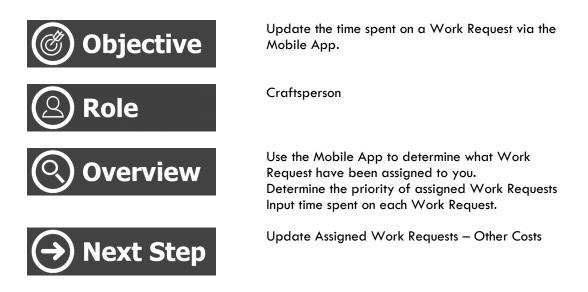


	내 Telstra 🗢	1:01 pm	91% 🔲
Mandatory fields that must be completed are (continued):	Creat	e Work Reque	 ✓
	Repair Type		⊗ >
Priority	Equipment Code		>
Description	Equipment Standard		
	Equipment Description		
	Priority	Planned	
	Description		
	enter a description	into this field - Te	sting
			⊗
	Safety		
	Revised Due Date		
	Reschedule Status		
	📶 Telstra 🗢	12:59 pm	91% 💷)
8. Types of data entry – Look-up fields		Buildings	Done
These fields prompt a selection from a data base	₽G12	\otimes	Ф.
list. Use the look-up field to display suitable options	Code: G12	Dellalla	
and then select the most appropriate value.	Building: Services	s Building	
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12.3. Update Assigned Work Requests – Time



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

Step	Image
 Launch the Archibus Mobile App Select the Maintenance module from the menu 	Asset & Equipment Survey Assessment Maintenance
3. Synchronise the App	III Telstra 11:16 am 100% ■ + ▲ Apps ▲ ● ● ● ● ● ● ● ● ●
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.	Apps Approved S699852 FIRE 30/07/2019 Approved testing linked work request on mobile app S699853 FIRE 06/05/2019 Approved Test Link No More Records My Requests 2 Issued 2 My Requests
 You can see the Issued and In Process or On Hold Work Requests. You will see those assigned to you by your Supervisor in order of Priority, i.e., the tradesperson assigned or scheduled date. 	



	5:23 ≺ Search	ul 🗢 🗖
6. Select a Work Request to see more details	🗙 Apps	A <i>2</i>
	Conduct steps as pr and 1 Week, Statuto Fired, for the whole	ar procedure tor 1 Day ry A6.3 Boliers - Gas month.
	23/11/2022 09:00 ar Equipment:K25-03- Conduct steps as pe	ROOF-11154-04-11154 er procedure for 1 Day pry A6.3 Boilers - Gas
	Priority 1 Emerg	leucy
	6771807 CLEAN 15:34 pm 0.00hrs Testing - Mobile Sta snapshots	ING GENERAL 02/02/2023 Issued and In Process rt Stop feature
	6771809 MECH/ 02/02/2023 16:34 pr Mechanical Services	
	Priority 2 Urgent	t
	6407945 ELECT 20/10/2021 10:53 ar ✓ OPEN SPACE : ENG BOARDWALK 3 X P working. Assets# 30 3003662.	GINEERING ole lights are not
	0.00hrs Equipment:2009230 Link job Led strip lig footbridge walkway creat link job to repla	Int on wall of A09A not working Need to ace faulty control Boards
	to the make the RG	I led strin work only.
7. Within the Work Request, you can see the following information:	nti Teistra 🗢	1:36 pm 89% —
 Requestor, who requested the Work Request 		9
 Location, where the problem is 		28/09/2022
 Work Request Type, the category of work 	Requestor	NAME NAME
request	Phone	N/A
 Status, the status of the Work Request 	Email	name.name@sydney.edu.au
	School Code	2594
	Department Code	2595
8. Scroll down to see more.	Site	01
	D. Hollow	K25
	Floor	
	14-00007 	03
	Room	
	Problem Location	
	Work Request Type *	P
	Latitude	
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 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. 	5:27 • Search V Update New Craftsperson Notes Customer Notes History New Customer Notes
10. Once you are ready to commence work, click the Start button.	Step Comments Start Ho Parts Tools Costs Do Ref Ch
11. After you click on the Start button, the Select Work Type screen appears.	Search Update Select Work Type Travel Time Work Material Pickup Job Setup or Prep. Wait for Security Wait for Client



 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. 533 ut work type the start work type the part 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. 		5:30 .11 중 ■) < Search
13. To indicate that the Work Request has been completed, you can click on the Stop button at the	12. If you select the Work button as the Work Type, it	
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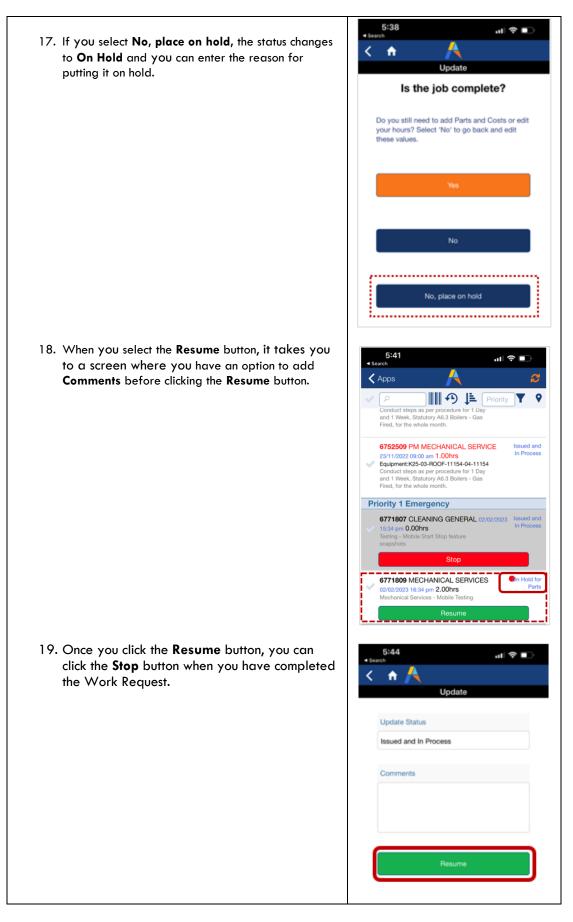


	5:35 ,11 奈 ■⊃
	< ▲ ✓ ☑ Update
	New Craftsperson Notes
	testing auto time update
	Customer Notes History
	New Customer Notes
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	Step Comments
	Stop Job Totals:3m Ho Parts Tools Costs Do Ref Ch
 14. When the Stop button is clicked, you need to confirm if the Work Request has been completed: Is the job complete? Select the button that applies: Yes No No, place on Hold 	Signal Signal Signal Is the job complete? Is the job complete? Do you still need to add Parts and Costs or edit your hours? Select 'No' to go back and edit these values. Ves No No, place on hold

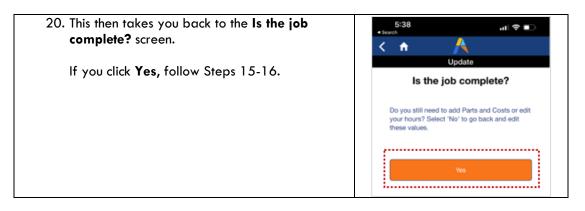


15. If you select the Yes button, a screen with a Complete button appears.	5:38 ■ Search ■ Complete? Is the job complete? Do you still need to add Parts and Costs or edit your hours? Select 'No' to go back and edit these values.
 NOTE: Please do not use the Additional Comments on this page. Please enter 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. 	5:50 Search Work Type Work Comments Comments Complete
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.	Complete As upervisor can update labor, parts, comments, and other work details until the request is Closed. Complete the work request? No Ves Ves

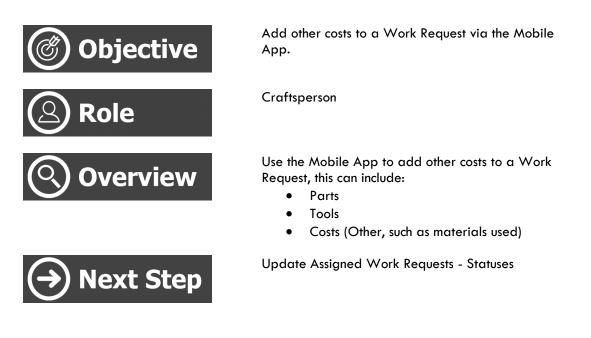




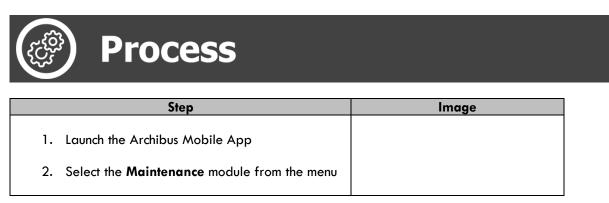




12.4. Update Assigned Work Requests – Other Costs



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.





	Archibus
3. Synchronise the App	
The number displaying in the section selector	stra 📚 12:59 pm 91% pps A A C + status proved 56999852 FIRE 30/07/2019 Approved testing linked work request on mobile app 56999853 FIRE 06/05/2019 Approved Test Link No More Records My Requests Issued My Requests
 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 	



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Customer Notes History, a history of any comments made by the customer regarding	what the problem is and what needs to be			
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 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. 	5:27 Search Craftsperson Notes
	Customer Notes History New Customer Notes Step Comments
 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. 	Status Issued and In Process Cra ⁶ Parts ² Tools ¹ Costs ⁵ Doc ² Ref
 11. Parts Either adjust an existing entry or use the available fields to input a new entry. 	Il Telstra Il 0:38 am 93% Im / Image: A straight of the
 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	Parts CHES2000 MAIN 0.00 CH1659 MAIN 1.10
enter new information. The ✓ saves the entry you have just made.	Add Part Part Code * Image: Add Part Storage Location Code * Image: Add Part Quantity Estimated 0.00
	Quantity Used 0.00 🛛 😑 🛨



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.

	10:38 am	93% 💻
< 🔶	\mathbf{A}	+ 🗸
	Tools	
Tap +	to assign new tools	
Annian Taul		
Assign Tool		
Tool Code *		0
	08/02/2023	0
Tool Code * Date Scheduled * Time Scheduled *	08/02/2023	0,
Date Scheduled *		(X) (X) (X) (X) (X) (X) (X) (X) (X) (X)
Date Scheduled * Time Scheduled * Date Started		S 1
Date Scheduled * Time Scheduled * Date Started Time Started		_
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Date Scheduled *	23:18	lacksquare

11:01 an

Costs

Tap + to add new costs

Material

2.00

0.00

200.00

11:16 am

Status

enter details here

8

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2

7 9

8 🖨 🛟

く 🏠

Other Costs

Add Other Cost

Other Resource

Other Resource

Description

Quantity Used

Estimated Cost

Actual Cost

🖬 Telstra 🔶

Apps

Type ¹

Units

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

14. Synchronise the App

• Enter the total cost into the Actual Cost field



12.5. Update Assigned Work Requests – Status

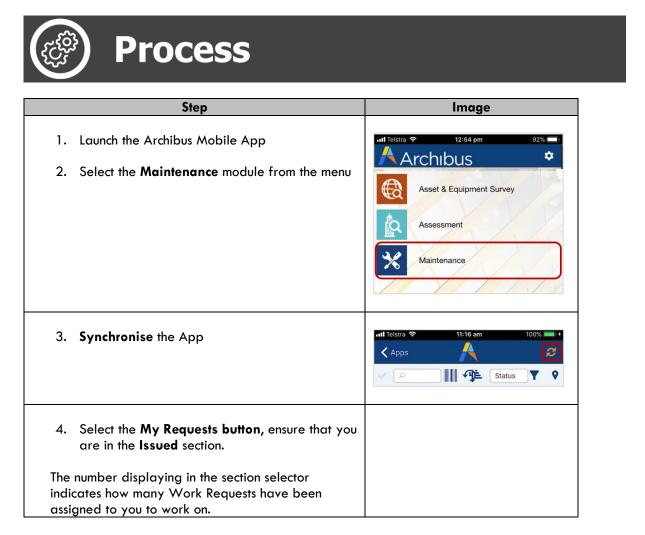


To change the status of a Work Request on a mobile device.

Craftsperson

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.





		📶 Telstra 🔶	12:59 pm	91%
		< Apps		2 +
			III • ●	Status
		Approved		Approved
			FIRE 30/07/2019 ed work request on mobile	
		5699853 Test Link	FIRE 06/05/2019	Approved
			No More Records My Requests ssued My Requests	0
5.	Work Requests are categorised by Status. You will only see Work Request that are in a status that you can work within.	াাা Telstra হ Apps	1:36 pm	89% 🗩) S
		م 🗸	!!!! • > [!=	Status 🗸 📍 🝸
	 Issued and in Process 	Issued an	d In Process	
		5699121	1 FIRE 06/05/2019	Issued and In
	On Hold	Dangling I	Fire Exit Door sign	Process
,			7 FIRE 22/08/2019	Issued
6.	Select a Work Request to see more details	TEST		and In Process
			7 PM FIRE 16/09/2019	Issued
		~		and In Process
			Storage Tank - 1M - - AS1851-2012 Section 5	
		5708148	B PM FIRE 16/09/2019	Issued and In
		Fire Water	r Storage Tank - 1M -	Process
		Statutory	- AS1851-2012 Section 5	
		On Hold	9 PM FIRE 16/09/2019	On Hold
		5708148	9 PWI FIRE 16/09/2019	for Labor
			Issued	
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 	.ııl Telstra 🗢 1:36 pm 89% ■
	< 🗅 👂 📐 🛛 🖌
Scroll down to see more.	Update 22/08/2019
	Requestor NAME, NAME
	Phone 12345678
	Email name.name@sydney.edu.au
	School Code 1014
	Department Code 1861
	Site 02
	Building G12
	Floor
	Room
	Problem Location
	Problem Type FIRE
	Status Issued and In Process
	Cra Parts Tools Costs Doc Ref
 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. 	5:27 III R III Search Update Update III New Craftsperson Notes III Customer Notes History IIII New Customer Notes IIII Step Comments IIII



	utl Telstra 🗢 10:38 am 93% 📖 +
 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. 	Image: Conduct steps as per p Conduct steps as per p Statutory A6/3 Boilers - Hold for Labor Hold for Access Hold for Quote Craftsperson Notes His Link New
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.	
 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. 	III Telstra III:16 am 100% Image: Constraint of the second se
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.	



	Statutory A6.3 Boile Craftsperson Notes This active waiting for security acc	11:16 am Update er procedure for 1 Day rrs - Gas Fired, for the v History Hold for Access on puts a request on hold puts a request on hold. on hold the work request ve	t while rade, or mplete a
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.	20/11/2022 00:00 Equipment: 201242 Conduct steps as j and 1 Week, Statut Fired, for the whole 6752493 PM N 20/11/2022 00:00 Equipment: 201500 Conduct steps as j	25-11154 per procedure for 1 Day tory A6.3 Bollers - Gas e month. Resume MECHANICAL SERVICE arm 1.00hrs 76-11153 per procedure for 1 Day tory A6.1 Bollers - Electric,	n Hold for Parts
 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. 	20/11/2022 00:0 Equipment X2:0 Conduct steps as and 1 Week, Statt Fried, for the who 23/11/2022 00:0 Equipment X2:0 Conduct steps as and 1 Week, Statt Fried, for the who On Hold 6407945 ELE 20/10/2021 10:5 OP SPACE: EN X Pole lights are t 3003931, 300366 6321880 LIGH 8.00hrs Unable to reach li which is causing new yob to quote	13-ROOF-11154-03-11154 be month. MECHANICAL SERVIC 0 am 1.00hrs 13-ROOF-11154-04-11154 13-ROOF-11154 13-ROOF-11154 13-ROOF-11154 13-ROOF-11154 13-ROOF-11154 13-ROOF-11154-04-11154 13-ROOF-1154 13-ROOF-1154 13-ROOF-1154 13-ROOF-11	E Issued and In Process E Issued and In Process On Hold for Parts am On Hold for Labor
	new job to quote	for the use of scaffolding to	3



13. On Demand SLAs



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:



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



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

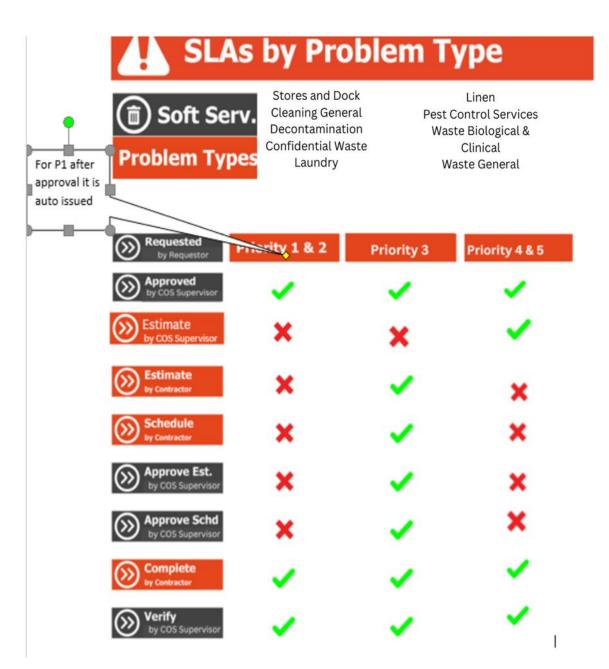


This section provides information on which Problem Types require estimation/scheduling, and in which circumstances they are required.



13.1. Soft Services

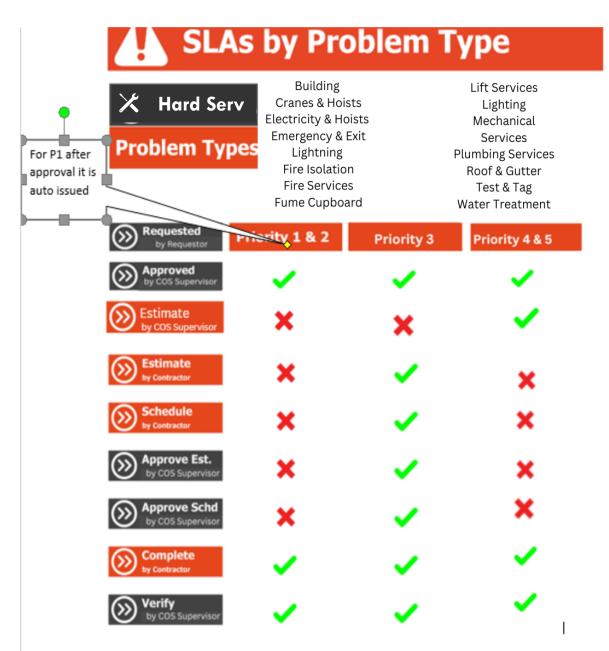
Scenario: Estimates and/or Scheduling are required for all P3, P4 and P5 Work Requests. P4 and 5 are estimated by COS supervisor, therefore no estimation approval is required. P1 is auto-issued after approval by COS supervisor.





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
Security Problem Types	Traffic & Parking Temp Permit Parking Meters Traffice & Parking Traffic & Parking Barricading
Requested by Requestor	Priority 1, 2, 3, 4 & 5
Approved by COS Supervisor	✓
Estimate by Contractor	×
Schedule by Contractor	×
Estimate & Schedule by COS Supervisor	 Image: A second s
Somplete	 Image: A set of the set of the
Verify by COS Supervisor	 Image: A set of the set of the







SLAs by Problem Type

Security Problem Types	Security Services Conciergetasks Security Services Lock Unlock Security Services Out of Hours Security Services Traffic Ctrl Security Services
Requested by Requestor	Priority 1, 2, 3, 4 & 5
Approved by COS Supervisor	 Image: A set of the set of the
Estimate by Contractor	×
Schedule by Contractor	×
Estimate & Schedule by COS Supervisor	✓
Omplete by Contractor	 Image: A set of the set of the
Werifv by COS Supervisor	✓



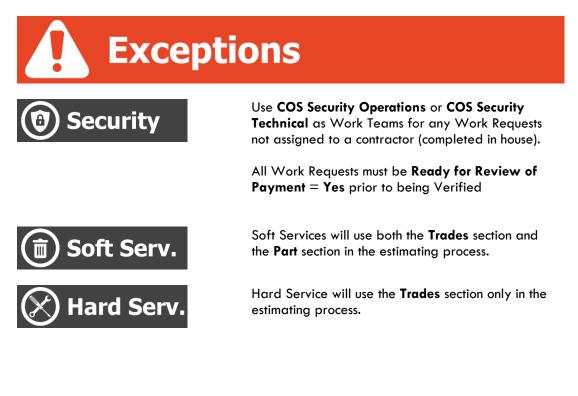
Scenario 2: P1-2, estimation and scheduling are completed internally by COS Security Supervisors. P3-5, estimation is completed by COS Security Supervisor, scheduled by a Contractor Supervisor, and the schedule comes back to a COS Scheduler to approve.





14. Specific Rules – On Demand Work Requests

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



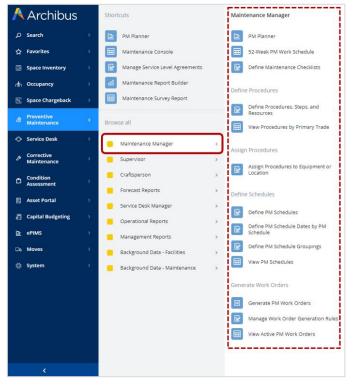


15. Planned Preventative Maintenance (PPM)

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.

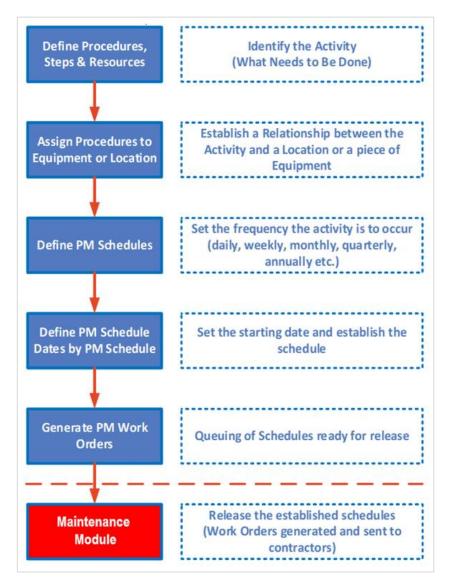


There are a suite of tools available within the Maintenance Manager for the management of PPM:



15.1. PM Workflow

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

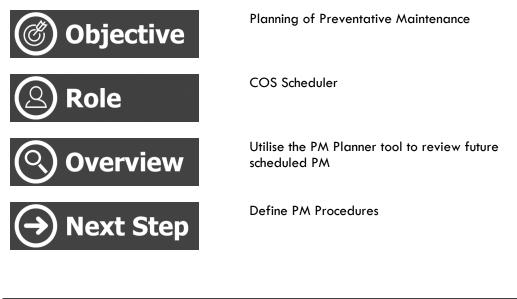




15.2. PM Planner

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.

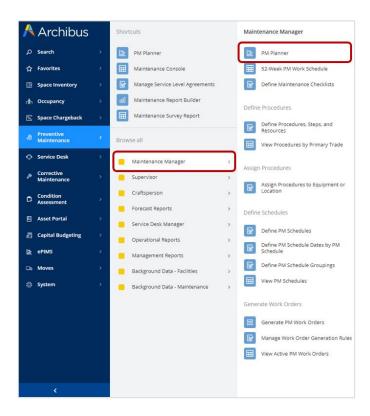
With the PM Planner, you can graphically see which jobs are coming up, which are completed, and which were missed or deferred. When you spot problems, you can edit future schedule dates directly from the PM Planner.





Select from the menu:





Use the filters available at the top of the page:

Work Schedule SITE BUILDING SLA. Work. Team TRADE IPM PROCEDURE EQ SYSTEM More Clear FROM Recent	8 PN	l Planner								SYDNEY	?	ŵ	0
					_	re Clea	Filter	Recent					

The results are displayed in Gantt chart style:

🔏 P	M Pla	nne	er														SYDN SYDN	EY 🕐	ŵ	8
Work Sche	dule	© Opt	tions																	
SITE		BUILD	DING	SLA Work Tea	TRADE	PM PROCEDURE	EQ SYS	TEM	Ν	ore Ci	iear Filt	er Rece	nt -							
~							< Janua	ry 2023				Febru	ary 2023			March	2023			
ø	Equipm	ent C	Site Code	Location	Interval	PM Procedure	W01	W02	W03	W04	W05	W06	W07	W08	W09	W10	W11	W12	W1	3
• N/A				0% on ti	me 2578 scheduled		1	18	2		135	193	193	205	218	220	220	220	227	
11101				0% on ti	me 0 scheduled			12												
11102				0% on ti	me 0 scheduled															
11103				0% on ti	me 0 scheduled			16												
11104				0% on ti	me 0 scheduled			192												
11105				0% on ti	me 0 scheduled			109												

Clicking on the cog icon gives options:

- Group by Equipment Standard
- Select (add/remove) fields
- Display options
- Export to a spreadsheet



Vork Schedule	Options			
SITE	BUILDING	SLA Work Team	TRADE	PM PROCEDURE
合 Equin	ment C Site Code	Location	Interval	PM Procedure
Equip				
Group by Equip Select Fields	ment Standard	0% on time	e 2578 schedul	ed 0000000000000000000000000000000000
Group by Equip Select Fields Display 16 Weel		0% on time		ed 0000000000000000000000000000000000

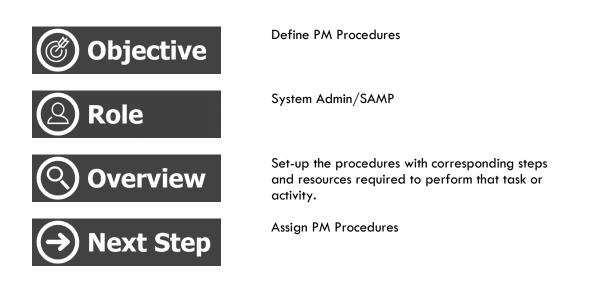


15.3. Define Procedures

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:

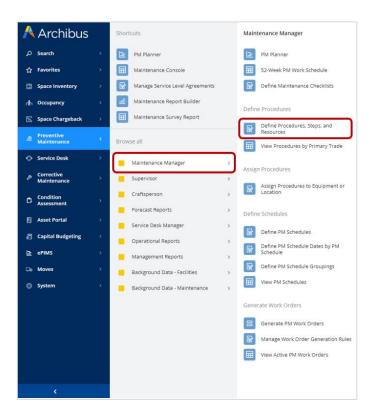
- A Unique identifier and a link to a defined Primary Trade/Purchase Order
- Step(s), as many as required to provide instruction on what must be done
- Resources required to complete each Step. Resources can include;
 - Trades (People to do each step)
 - Parts (Any parts or materials required for each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





Navigate Here:





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

🔏 Define PM Procedures, Steps, and Re	sources		SYDNEY	0	ŵ	0
Filter Show Clear						
PM Procedure	PM Procedure Description	Procedure Type				
Primary Trade	Problem Type					
Instructions						

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

🔏 Define PM Procedures, Steps, and R	lesources		SYDNEY	0	to	0
Filter Show Clear						
PM Procedure	PM Procedure Description	Procedure Type				
Primary Trade	Problem Type					
Instructions						
Procedures, Steps, and Resources Add New	Procedures Procedure Steps Checklists Trades	Parts Tool Types				
	Save Delete					
	PM Procedure*	PM Procedure Description				
	Primary Trade	Procedure Type				
		Equipment 🛩				
	Std. Units per Hour	Std. Units (sq. ft., etc.)				
	Account Code	Equipment Standard				
	Cost Category	PM Procedures to Suppress				

To edit an existing Procedure. Select a procedure from the list:



🔏 Define PM Procedures, Steps, and Re	esources	SYDNEY	?
Filter Show Clear			
PM Procedure	PM Procedure Description	Procedure Type	
Primary Trade	Problem Type		
Instructions			
Procedures, Steps, and Resources Add New	Procedures Procedure Steps Checklists Trad	des Parts Tool Types	
ACE1PATCT1AM-1D Patrol Services Vehicle 1, CITY, Monday, 06:00 to 18:00, (1 Gu at Grade 2), Year Round	Save		
ACE1PATCT1PM-1D Patrol Services Vehicle 1, CITY, Monday, 18:00 to 06:00+1, (1	DM Brocoduro*	DM Drocodure Description	
Guard-at/Grade 2), Yaar Round		PM Procedure Description Patrol Services Vehicle 1, CITY, Tue	
Guard at Grade 2). Year Round ACE1PATCT2AM-1D Patrol Services Vehicle 1, CITY, Tuesday, 06:00 to 18:00, (1 Gu at Grade 2), Year Round			
Guard-oLGrade-3), Year-Round ACE1PATCT2AM-1D Patrol Services Vehicle 1, CITY, Tuesday, 06:00 to 18:00, (1 Gu at Grade 2), Year Round 	ACE1PATCT2AM-1D	Patrol Services Vehicle 1, CITY, Tue	
ACEIPATCT2AM-1D Patrol Services Vehicle 1, CITY, Tuesday, 06:00 to 18:00, (1 Gu at Grade 2), Year Round - AEETA TE TEM-10-Tatrol Services Yehicle 1, CITY, Toesday, 16:00 to 06:00 tr. (H Guard at Grade 2), Year Round	ACEIPATCIZAM-1D Primary Trade ACES	Patrol Services Vehicle 1, CITY, Tue Procedure Type	
C part de Accelé 21, Van Bond Act PART 2044 D Parto Services Vehicle 1, CITY, Tuesday, 06:00 to 18:00, (1 Gu at Grade 21, Van Round Services Technologies, Contract Vehicle 1, CITY, Tuesday, 06:00 to 18:00, (1 Guard at Grade 21, Van Round ACEI PART 2044 D Parto Services Vehicle 1, CITY, Wednesday, 06:00 to 18:00, (1 Guard at Grade 27, Van Round ACEI PART 30 Parto Services Vehicle 1, CITY, Wednesday, 06:00 to 18:00, (1 Guard at Grade 2), Van Round ACEI PART 30 Parto Services Vehicle 1, CITY, Wednesday, 18:00 to 06:00+1, Guard at Grade 2), Van Round	Luard ACEIPATTZAM-10 Primary Trade ACES Std. Units per Hour (1 Account Code	Patrol Services Vehicle 1, CITY, Tue Procedure Type Location	
Card-Accessed 2: New Board ACETARTCRAM-TD Partol Services Vehicle 1, CTV, Tuesday, 06:00 to 18:00, (1 Gu at Grade 2), Vear Round ACETARTCRAM-TD Partol Services Vehicle 1, CTV, Wednesday, 06:00 to 18:00, (1 ACETARTCRAM-TD Partol Services Vehicle 1, CTV, Wednesday, 06:00 to 18:00, (1 ACETARTCRAM-TD Partol Services Vehicle 1, CTV, Wednesday, 18:00 to 06:00+1, Guard at Grade 2), Vear Round ACETARTCRAM-TD Partol Services Vehicle 1, CTV, Wednesday, 18:00 to 06:00+1, ACETARTCRAM-TD Partol Services Vehicle 1, CTV, Wednesday, 18:00 to 06:00+1, ACETARTCRAM-TD Partol Services Vehicle 1, CTV, Thursday, 06:00 to 18:00, (1 G at Grade 2), Vear Round	JACE IPAT (CT2AM-10 Primary Trade ACES Std. Units per Hour .1 Account Code Gost Category	Patrol Services Vehicle 1, CITV, Tue Procedure Type Location V Std. Units (cq. ft., etc.)	
Cust de Affacté 21 Alex Royad A CETPATCIZAM ID Partol Service Vehicle 1, CITY, Tuesday, 06:00 to 18:00. (1 Gu af Grade 2), Year Royad A Catel 2, Year Royad A Catel 20, Year Royad A Catel 20, Year Royad A CETPATCIZAM ID Partol Services Vehicle 1, CITY, Wednesday, 06:00 to 18:00. (1 Guard at Grade 2), Year Royad A CETPATCIZAM ID Partol Services Vehicle 1, CITY, Wednesday, 18:00 to 06:00+1, Guard at Grade 2), Year Royad A CETPATCIZAM ID Partol Services Vehicle 1, CITY, Wednesday, 18:00 to 06:00+1, Guard at Grade 2), Year Royad A CETPATCIZAM ID Partol Services Vehicle 1, CITY, Thursday, 06:00 to 18:00. (1 G	JACE IPATCT ZAM-10 Primary Trade ACES Std. Units per Hour .f1 Account Code Garde Gost Category 1	Patrol Services Vehicle 1, CITV, Tue Procedure Type Location v Std. Units (sq. ft., etc.) Equipment Standard	

Expanding the Procedure title will display any linked steps/trades/parts:



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

Key fields that are required for PM Procedures are:



	Equipment is typically used by the hard services trades as the activity relates back to a physical asset.
Problem Type	Select from available list in database.

PM Procedure Naming Convention

Here is a sample PM Procedure Title:

PM Procedure*

AGC11114M17.1-3M

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.

Procedures, Steps, and Resources Add New	Proc	edures	Procedure Steps	Checklists	Trades	Parts	Tool Types	
ACE1PATCT1AM-1D Patrol Services Vehicle 1, CITY, Monday, 06:00 to 18:00, (1 Guard at Grade 2), Year Round		Save	Delete					
			PM Procedure Code	ACE1PATCT1AM-1D				PM Step Code* 1
			Instructions*					
								4

Field	Comment
PM Step Code	Enter 1 into the step code field. Do not enter any other steps or values.
Instructions	Provide instruction on what activities must occur. Reference any relevant standards.

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.

						•		
Procedures, Steps, and Resources Add New	Procedures	Procedure Steps	Checklists	Trades	Parts	Tool Types		
ACE1PATCT1AM-1D Patrol Services Vehicle 1, CITY, Monday, 06:00 to 18:00, (1 Guard at Grade 2), Year Round	Save	Delete						
 STEP 1 Patrol Services Vehicle 1, CITY, Monday, 		PM Procedure Code	ACE1PATCT1AM-1D				PM Step Code 1	
Trade ACEGRAD2WKDAY		Trade Code*	ACEGRAD2WKDAY			ŀ	Hours Required 12.00	

Field	Comment
Trade Code	Select the required Trade Code from the
	available list.



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.

Procedures, Steps, and Resources Add New	Procedures Pro	cedure Steps	Checklists	Trades	Parts	Tool Types
ACE1PATCT1AM-1D Patrol Services Vehicle 1, CITY, Monday, 06:00 to 18:00, (1 Guard at Grade 2). Year Bound	Save Delete					
 STEP 1 Patrol Services Vehicle 1, CITY, Monday, 	PM	Procedure Code AC	E1PATCT1AM-1D			PM Step Code 1
Trade ACEGRAD2WKDAY		Part Code*				Quantity Required 0.000

Field	Comment
Part Code	If standard parts are to be replaced or used as part of completing this activity. Enter the appropriate part code here.
Qty Required	The number of parts that are to be used to complete the activity.

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.

Procedures, Steps, and Resources Add New	Procedures	Procedure Steps	Checklists	Trades	Parts	Tool Types
ACE1PATCT1AM-1D Patrol Services Vehicle 1, CITY, Monday, 06:00 to 18:00, (1 Guard at Grade 2), Year Round	Save	Delete				
STEP 1 Patrol Services Vehicle 1, CITY, Monday,		PM Procedure Code	ACE1PATCT1AM-1D			PM Step Code 1
Trade ACEGRAD2WKDAY		Tool Type*]	Hours Required 0.00

Field	Comment
Tool Туре	Select the required Tool Type from the available list.
Hours Required	Amount of time that is allowed for a use of the tool to complete the activity.

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

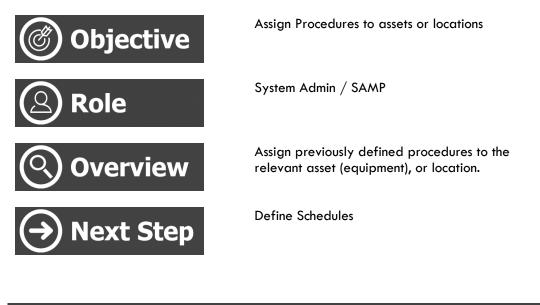


15.4. Assign Procedures

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.

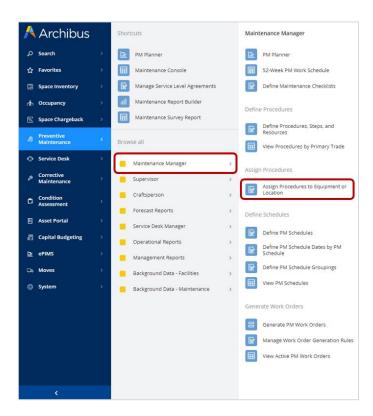
For example, if you have defined a general procedure for changing a filter, you can assign this procedure to each equipment item whose filter must be changed. Or, if you have a service activity performed by a patrol guard daily. That procedure can be assigned to a specific location (such as a building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



Process

Navigate here:





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

🔏 Assig	n Proce	dures to Equipment	or Location	
Filter Show	Clear			
Site Code		School Code	Department Code	
Building Code		Floor Code	Room Code	
Equipment Stand	lard	Equipment Standard Description	Equip. Status	No Procedure
Equipment	Location !	System		

Equipment

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

Equi	pment Location S	ystem	
	pment Code:		
101	6 1 5 218310 315624 417702 5273 Equipment Code	7 6 36 7 145 81 9 370 A 33379 B 5844 C 23	501 D 26336 E 2867 F 35127 G 22832 H 44026 [10 J 22137 K 6214 L 624 M C Equipment Standard Description
	2005742	11315	Fume Cupboard Fan
	000-01-EXT-EXT-12401-01	12401	Hyd-Landing Valves-Twin
	000-01-EXT-EXT-12401-02	12401	Hyd-Landing Valves-Twin
	000-01-EXT-EXT-12401-03	12401	Hyd-Landing Valves-Twin
	000-02-EXT-EXT-12401-01	12401	Hyd-Landing Valves-Twin

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.

Filter					FTT			Delete Selected		
	Show Clear				Assi		or:000-13-XS-OSB-14380-01	Delete Selected		
Site Co	ode	School Code	Department Code			PM Procedure	PM Procedure Description			
-						BRS14380ST-1Y	Residual Current Device 30m	nA TMI-2069-PE-1007 ,	Details	Schedule
Buildin	ng Code	Floor Code	Room Code			BRS14380ST-6M	Residual Current Device 30m	nA TMI-2069-PE-1004,	Details	Schedule
Equipr	ment Standard	Equipment Standard Description	Equip. Status	No Procedure	1					
			A		1 - I					
			In service							
Equipm	nent Location S	ystem				۵dd	Procedures from	lower list (ave	ailable)	
Fauinme	ent Code:								mable	
		7 636 7145 81 9370 A33379 B5844 C255	01 D26336 E2867 F35127 G22832 F	H 44026 10 J 22137 K 6214 L 624 M 1107		Into t	he upper list (as	signea)		
	Equipment Code	Equipment Standard	Equipment Standard E	Description						
- 0	000-02-EXT-EXT-12401-03	12401	Hyd-Landing Valves-Tw	in						
	000-13-1	11438	BMS Control Panel							
	000-13-XS-OSB-14378-01	14378	Load Centre		1					
v 0	000-13-XS-OSB-14380-01	14380	Residual Current Dev	ice 30mA	1 - I					
	000-13-XS-OSB-14380-02	14380	Residual Current Dev	ice 30mA	Avai	lable Procedures	Add Selected			
	000-13-XS-OSB-14380-03	14380	Residual Current Dev	ice 30mA	Avai	PM Procedure	PM Procedure Descripti	lan		
0	000-13-XS-OSB-14380-04	14380	Residual Current Dev	ice 30mA	U .	FMFrocedure	 FM Procedure Description 	1011	×.	
_ 0	000-13-XS-OSB-14380-05	14380	Residual Current Dev	ice 30mA						
0	000-13-XS-OSB-16240-01	16240	Water Meter			ALARM-PM-WKLY	Fire Alarm Testing-Week			Details
_ 0	000-13-XS-OSB-16240-02	16240	Water Meter			AS/NZ-2293.2	Aust & NZ Standard for I			Details
0	000-31-12401-31	12401	Hyd-Landing Valves-Tw	vin		AS1851-1-1995	Standard-Portable Fire E	•		Details
<u> </u>	12345678A	11294	Reverse Osmosis Unit			AS1851-10-1989		arning & Intercommunica		Details
1	12345678B	16320	Rain Water Treatment	Plant		AS1851-3-1985		e Equipment Sprinkler Sys	•	Details
1	12345678C	11294	Reverse Osmosis Unit	t		AS1851-4-1992 AS1851-6-1983	Australian Standard -Fire	e Hydrant Installations n features of AHU System		Details Details

Procedures can be added or removed as required.

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

Avai	lable Procedures	Add Selected	
	PM Procedure	PM Procedure Description	\$
	ALARM-PM-WKLY	Fire Alarm Testing-Weekly (AS1851-8:1987)	Details
	A5/NZ-2293.2	Aust & NZ Standard for Emergency evacuation	Details
	AS1851-1-1995	Standard-Portable Fire Extinguishers & Blan	Details
	AS1851-10-1989	Standard-Emergency Warning & Intercommunica	 Details
	AS1851-3-1985	Standard-Automatic Fire Equipment Sprinkler Sys	Details
	AS1851-4-1992	Australian Standard -Fire Hydrant Installations	Details

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

	PM Procedure	PM Procedure Description		
	BRS14380ST-1Y	Residual Current Device 30mA TMI-2069-PE-1007 ,	Details	Schedule
n –	BRS14380ST-6M	Residual Current Device 30mA TMI-2069-PE-1004,	Details	Schedule

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).

pment Locat				
Building Code	Floor Code	Room Code	🗢 Room Name	Room Standard
G12				
G12	01			
G12	01	100	Reception	

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.

Filter	Show Clear				Assig	gned Procedures fo	r:G12 Delete Selected		
Site	Code	School Code	Department Code			PM Procedure	PM Procedure Description		
						ACECCTV1AM-1D	CCTV Operator, CITY, Monday, 07:00 to 15:00, (1	Details	Schedule
	lding Code	Floor Code	Room Code			ACECCTV1PM-1D	CCTV Operator, CITY, Monday, 15:00 to 23:00, (1	Details	Schedule
512						ACECCTV2AM-1D	CCTV Operator, CITY, Tuesday, 07:00 to 15:00, (Details	Schedule
Equ	ipment Standard	Equipment Standard Description	Equip. Status	No Procedure		ACECCTV2PM-1D	CCTV Operator, CITY, Tuesday, 15:00 to 23:00, (Details	Schedule
			In service			ACECCTV3AM-1D	CCTV Operator, CITY, Wednesday, 07:00 to 15:00,	Details	Schedul
						ACECCTV3PM-1D	CCTV Operator, CITY, Wednesday, 15:00 to 23:00,	Details	Schedul
juip	oment Location	System				ACECCTV4AM-1D	CCTV Operator, CITY, Thursday, 07:00 to 15:00,	Details	Schedul
)	Building Code 🔶	Floor Code 💠 Room Code	Room Name	Room Standard		Add	Procedures from lower list (av	vailable)
							the upper list (assigned)		
	G12					1110	me opper na (dasigned)		
_		01				ino	me opper na (assigned)		
	G12	01 01 100	Reception						
	G12 G12		Reception						
	G12 G12 G12	01 100	Reception		Δvai				
	G12 G12 G12 G12	01 100 01 100A	Reception Meeting Room 4 10 AV North			lable Procedures	Add Selected		
	G12 G12 G12 G12 G12 G12	01 100 01 100A 01 100D			Avai			÷	
	G12 G12 G12 G12 G12 G12 G12 G12	01 100 01 100A 01 100D 01 101				lable Procedures	Add Selected	¢	
	612 G12 G12 G12 G12 G12 G12 G12 G12	01 100 01 100A 01 100D 01 101 01 102	Meeting Room 4 10 AV North			lable Procedures	Add Selected PM Procedure Description General Cleaning, PBI - Headhouse, 1 Month	¢	Details
	612 G12 G12 G12 G12 G12 G12 G12 G	01 100 01 100A 01 100D 01 101 01 102 01 103	Meeting Room 4 10 AV North			lable Procedures PM Procedure	Add Selected © PM Procedure Description General Cleaning, PBI - Headhouse, 1 Month General Cleaning, PBI - PhD Offices, 1 Month	¢	Details
	612 G12 G12 G12 G12 G12 G12 G12 G	01 100 01 100A 01 100D 01 101 01 102 01 103 01 103A 01 103B 01 103B 01 103B 01 193C	Meeting Room 4 10 AV North			Iable Procedures PM Procedure GjKC48CL-1M GjKC54CL-1M GjKC54CL-1M	Add Selected PM Procedure Description General Cleaning, PBI - Headhouse, 1 Month General Cleaning, FL Biock, 1 Month General Cleaning, K Biock, 1 Month	¢	Details Details
	612 G12 G12 G12 G12 G12 G12 G12 G	100 01 100A 01 100D 01 101 01 102 01 103 01 103A 01 103B 01 1032 01 1032	Meeting Room 4 10 AV North			Able Procedures PM Procedure GjkC48CL-1M GjkC43CL-1M GjkC43KCL-1M GjkC43LCL-1M	Add Selected PM Procedure Description General Cleaning, PBI - Headhouse, 1 Month General Cleaning, PBI - PhD Offices, 1 Month General Cleaning, L Biock, 1 Month	¢	Details Details Details
	612 G12 G12 G12 G12 G12 G12 G12 G	01 100 01 100A 01 100D 01 101 01 102 01 103 01 103A 01 103B 01 103B 01 103B 01 193C	Meeting Room 4 10 AV North			lable Procedures PM Procedure GJKC48CL-1M GJKC48CL-1M GJKC43KCL-1M GJKC43KCL-1M GJKC55ACL-1M	Add Selected © PM Procedure Description General Cleaning, PBI - Headhouse, 1 Month General Cleaning, BBI - PhD Offices, 1 Month General Cleaning, B Bick, 1 Month General Cleaning, B Cold, 1 Month General Cleaning, D Cold Cat Facility - Resid		Details Details Details Details
	612 612 612 612 612 612 612 612	01 100 01 100A 01 100D 01 101 01 102 01 103 01 103A 01 103B 01 103C 01 103D 01 103D 01 103D 01 105	103 103C Meeting Room 5 10 AV South Meeting Room 5 10 AV South			lable Procedures PM Procedure GjKC48CL-1M GjKC54CL-1M GjKC54CL-1M GjKC554CL-1M GjKC555CL-1M	Add Selected PM Frocedure Description General Cleaning, PBI - Headhouse, 1 Month General Cleaning, PBI - PhD Offices, 1 Month General Cleaning, L Block, 1 Month General Cleaning, L Block, 1 Month General Cleaning, D and Cat Facility - Reside General Cleaning, D and Cat Facility - Reside	0	Details Details Details Details Details
	612 612 612 612 612 612 612 612	100 01 100A 01 100D 01 101 01 102 01 103A 01 103B 01 103B 01 1032 01 103B 01 104	Meeting Room 4 10 AV North 103 103C Meeting Room 5 10 AV South			Table Procedures PM Procedure GJKC48LL-1M GJKC43LCL-1M GJKC43LCL-1M GJKC55ALL-1M GJKC55CL-1M GJKC55CL-1M	Add Selected PM Procedure Description General Cleaning, PBI - Headhouse, 1 Month General Cleaning, PBI - PhO Offices, 1 Month General Cleaning, L Block, 1 Month General Cleaning, D ga and Cat Facility - Resid General Cleaning, D ga and Cat Facility - Cat General Cleaning, D ga and Cat Facility - Practi General Cleaning, D ga and Cat Facility - Practi	o	Details Details Details Details Details Details
	612 612 612 612 612 612 612 612	01 100 01 100A 01 100D 01 101 01 102 01 103 01 103A 01 103B 01 103C 01 103D 01 103D 01 103D 01 105	103 103C Meeting Room 5 10 AV South Meeting Room 5 10 AV South			Able Procedures PM Procedure GjkC48CL-1M GjkC4SCL-1M GjkC4SCL-1M GjkC5SGCL-1M GjkC5SGCL-1M GjkC5SGCL-1M GjkC5SGCL-1M	Add Selected PM Frocedure Description General Cleaning, PBI - Headhouse, 1 Month General Cleaning, PBI - Hob Offices, 1 Month General Cleaning, L Block, 1 Month General Cleaning, L Block, 1 Month General Cleaning, Dog and Cat Facility - Resid General Cleaning, Dog and Cat Facility - Practi General Cleaning, Dog and Cat Facility - Practi General Cleaning, Blomedical Building, 1 Month	o	Details Details Details Details Details Details Details
1 3 3 3 3 3 3 3 3 3 3 3 3 3	612 612 612 612 612 612 612 612	100 01 100A 01 100D 01 101 01 102 01 103A 01 103A 01 103A 01 103B 01 103D 01 103D 01 104 01 104 01 106	Meeting Room 4 10 AV North 103 103C Meeting Room 5 10 AV South Meeting Room 6 6 South Meeting Room 7 6 South			Table Procedures PM Procedure GJKC48LL-1M GJKC43LCL-1M GJKC43LCL-1M GJKC55ALL-1M GJKC55CL-1M GJKC55CL-1M	Add Selected PM Procedure Description General Cleaning, PBI - Headhouse, 1 Month General Cleaning, PBI - PhO Offices, 1 Month General Cleaning, L Block, 1 Month General Cleaning, D ga and Cat Facility - Resid General Cleaning, D ga and Cat Facility - Cat General Cleaning, D ga and Cat Facility - Practi General Cleaning, D ga and Cat Facility - Practi	o	Details Details Details Details Details Details

Procedures can be added or removed as required.

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

Avai	lable Procedures	Add Selected		
	PM Procedure	PM Procedure Description	\$	
				0
	GJKC48CL-1M	General Cleaning, PBI - Headhouse, 1 Month	Details	
	GJKC54CL-1M	General Cleaning, PBI - PhD Offices, 1 Month	Details	
	GJKC43KCL-1M	General Cleaning, K Block, 1 Month	Details	

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

Assig	gned Procedures for	:G12	Delete Selected			
	PM Procedure	PM Pr	ocedure Description			
	ACECCTV1AM-1D	ССТУ О	Operator, CITY, Monda	y, 07:00 to 15:00, (1	Details	Schedule
	ACECCTV1PM-1D	ССТУ О	Operator, CITY, Monda	y, 15:00 to 23:00, (1	Details	Schedule
	ACECCTV2AM-1D	CCTV	Operator, CITY, Tuesda	y, 07:00 to 15:00, (Details	Schedule

System

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

Equipment	Location	ation System
Inventory Tree		

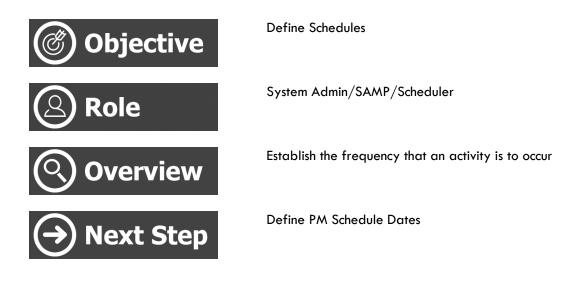


15.5. Define Schedules

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.

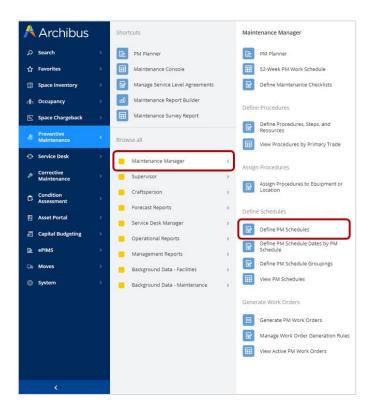
This section looks at the different ways that frequencies can be configured in Archibus and what options work best for the types of services that COS provides.





Navigate here:





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

🔏 Define PM Sche	edules				SYDNEY ⑦	☆ @
Filter Show Clear Show E	quipment Systems		Edit PM Schedule	Copy Save		
Building Code	Floor Code	Room Code				
PM Equipment Standard	PM Procedure	No Schedule				
Criticality	Primary Trade					
PM Schedule Group	Problem Type					
'		'				

8 Define PM Schedules SYDNEY () to (2) Filter Show Clear Show Equipment Systems Edit PM Schedule Copy Save Building Code Floor Code Room Code PM Procedure Basic Information PM Equipment Standard and the second second No Schedule PM Schedule Code 1009663 School Code Criticality Primary Trade View PM Procedure TEST-UAT1 Department Code Analyze PM Schedule Group PM Schedule Group Problem Type Equipment Code 2005742 Criticality Critical 🗸 SLA Work Team Code FREDON Equipment-Procedure Location-Procedure Schedule Information Calc. Hours to Complete 0.00 Date of Last PM Date for First PM 17/11/2022 Manual Date for Next PM Days Late Boundary 15 Equipment Code: 2 013 14 258566 342454 435519 53836 62 7500 81 9243 A 44019 B 9360 C 33079 D 28241 E 792 F 48637 G 31851 H 256 Calc. Date for Next PM 17/11/2022 Days Early Boundary 15 Equipment Code PM Procedure © PM Procedure Description Interval Type Months ~ Due Date from? SLA Current Frequency Fixed or Floating Fixed V Freq. 2 Interval 0 Freq. 4 Interval 0 Fire Alarm Testing-Weekly (AS1851-8:1987) Freq. 1 Interval 1 2005742 ALARM-PM-WKLY 2005742 TEST-UAT1 2 2005742 TEST-UAT1 UAT Test 1 0 000-13-XS-058-14380-01 BRS14380ST-1Y Residual Current Device 30mA TMI-2069-PE-1007. Freq. 3 Interval 0 000 13.X5:OSB-14380.01 BR5143805.71.Y 000 13.X5:OSB-14380.01 BR5143805.71.W 000 13.X5:OSB-14380.02 BR5143805.71.W 000 13.X5:OSB-14380.02 BR5143805.71.W 000 13.X5:OSB-14380.02 BR5143805.71.W 000 13.X5:OSB-14380.03 BR5143805.71.W 000 13.X5:OSB-14380.04 BR5143805.71.W Other Information Residual Current Device 30mA TMI-2069-PE-1004, Residual Current Device 30mA TMI-2069-PE-1007 , Residual Current Device 30mA TMI-2069-PE-1004, Storage Location Code MAIN Comments Total Units 1.00 Meter Reading on Last PM 0.00 Unit Desc. Residual Current Device 30mA TMI-2069-PE-1007 Num. Open Work Orders Residual Current Device 30mA TMI-2069-PE-1004, Residual Current Device 30mA TMI-2069-PE-1007 , -----_____ _____ Residual Current Device 30mA TMI-2069-PE-1004,

Set schedules for Equipment:



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

Equi	ipment-Procedure Loc	ation-Procedure	
	XLS Delete Selected	0	
~	1 selected		
Equi	pment Code: 2 013 14 258506	3 42454 4 35519 5 3636 6 2 7 50	0 81 9243 A44019 B9360 C33079 D28241 E792 F48637 G31851 H2
0	Equipment Code	PM Procedure	
U	Equipment Code	PM Procedure	PM Procedure Description
	2005742	ALARM-PM-WKLY	 PM Procedure Description Fire Alarm Testing-Weekly (AS1851-8:1987)
	2005742	ALARM-PM-WKLY	Fire Alarm Testing-Weekly (AS1851-8:1987)

This will display the Edit PM Schedule Pane:

Basic Information			
PM Schedule Code 100966	3		School Code
PM Procedure TEST-U/	AT1	View Depa	artment Code
Equipment Code 200574	2	Analyze PM Sch	nedule Group
Criticality Critical	~	SLA Work	k Team Code FREDON
Schedule Information			
Date of Last PM		Calc. Hours	s to Complete 0.00
Date for First PM	17/11/2022		Task Cost 0.00
Manual Date for Next PM		Days La	ate Boundary 15
Calc. Date for Next PM 1	17/11/2022	Days Ea	arly Boundary 15
Interval Type	Months 🗸	Du	ue Date from? SLA 🗸
Current Frequency	1 🕶	Fixe	ed or Floating Fixed V
Freq. 1 Interval	1	Fr	req. 2 Interval 0
Freq. 3 Interval	D	Fr	req. 4 Interval 0
Other Information			
Storage Location Code	Total U	nits	Unit Desc.
MAIN	1.00		
Comments	Meter F 0.00	Reading on Last PM	Num. Open Work Orders

Key fields that require values are:

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



	Floating – if you want to use the Date of Last PM as the starting date.
Interval Type	Regular options include; days, weeks, months, quarters, and years. Irregular option is; Recurrence Pattern
Current Frequency	Set to 1, 2, 3 or 4
Freq. 1 Interval	Enter a value. If Current Frequency is set to 1, it will reference this value.
Freq. 2 Interval	Enter a value. If Current Frequency is set to 2, it will reference this value.
Freq. 3 Interval	Enter a value. If Current Frequency is set to 3, it will reference this value.
Freq. 4 Interval	Normally set to 0. If Current Frequency is set to 4, it will reference this value and the schedule won't be active.

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.

edule Information				
Date of Last PM			Calc. Hours to Complete	0.00
Date for First PM	17/11/2022	ä	Task Cost	0.00
Manual Date for Next PM			Days Late Boundary	15
Calc. Date for Next PM	17/11/2022		Days Early Boundary	15
Interval Type	Years	~	Due Date from?	SLA 🗸
Current Frequency	1 🗸		Fixed or Floating	Fixed 🗸
Freq. 1 Interval	1		Freq. 2 Interval	0
Freq. 3 Interval	0		Freq. 4 Interval	0

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.



e Information	
Date of Last PM	Calc. Hours to Complete 0.00
Date for First PM 17/11/2022	Task Cost 0.00
l Date for Next PM	Days Late Boundary 15
. Date for Next PM 17/11/2022	Days Early Boundary 15
Interval Type Recurrence Pattern 🛩	Due Date from? SLA 🗸
Fixed or Floating Fixed V	
tecurrence Pattern	3 Frequency 4
ne	
ly	
ekly	
nthly rly	
rly	

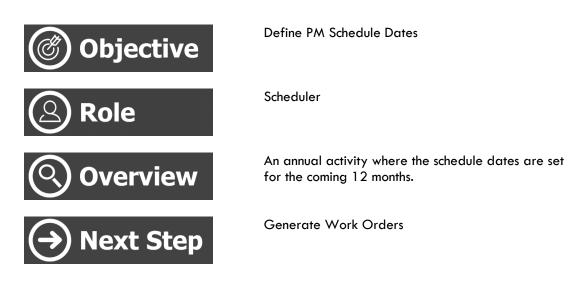
Note: Using interval Type and Frequency values in this way is most typical for Security and Soft Services where PM is used for scheduling of service orientated tasks. This option provides flexibility for daily tasks, with additional options for different schedules resulting from public holidays, semester breaks etc.



15.6. Define PM Schedule Dates by PM Schedule

This feature allows for the generation of scheduled dates.

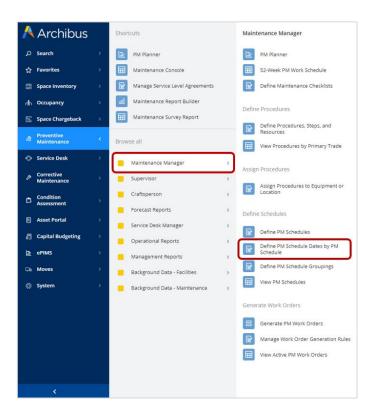
Typically, this is an annual activity, so the dates will most likely be scheduled and generated for a period covering a calendar year.





Navigate here:





Filter as required and select **Show**:

🔏 Define PM Schedule Dates			SYDNEY	?	ŵ	0
Filter Show Clear						
PM Procedure	Equipment Standard	PM Schedule Group				
Building Code	Floor Code	Room Code				
Criticality	Primary Trade	Problem Type				
·		'				

Select the required schedules and Generate:

PM Sch	redule Code: 1 20390 3	1856 5 23311 6 98786	793823 892572 999471 All 429209								
	PM Schedule Code 🖨	PM Procedure	Equipment Code	Equipment Standard Description	Building Code	Floor Code	Code	PM Schedule Group	Date for \$ First PM	of Date D Last for for	Manual Date for Next PM
2	1020597	AIR12110FIRE-5Y	C430-01-0163-12110-01	Detector - Heat - Point	C430	01	0163		15/11/2022		
2	1020596	AIR12110FIRE-5Y	C430-01-0162-12110-01	Detector - Heat - Point	C430	01	O162		15/11/2021		
2	1020595	AIR12110FIRE-5Y	C430-01-0161-12110-01	Detector - Heat - Point	C43O	01	O161		15/11/2020		
)	1020594	AIR12110FIRE-5Y	C43O-01-O160-12110-01	Detector - Heat - Point	C43O	01	O160		15/11/2024		
	1020593	AIR12110FIRE-5Y	C430-01-0159-12110-01	Detector - Heat - Point	C430	01	0159		15/11/2023		
	1020592	AIR12110FIRE-5Y	C430-01-0158-12110-01	Detector - Heat - Point	C430	01	0158		15/11/2022		

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.

				"× ×
Data Ran	ge			
From	1/1/2022	То	31/12/2022	
				Submit



Once the schedules are submitted, you can click into a specific PM Schedule Code to see the schedule dates that have been created:

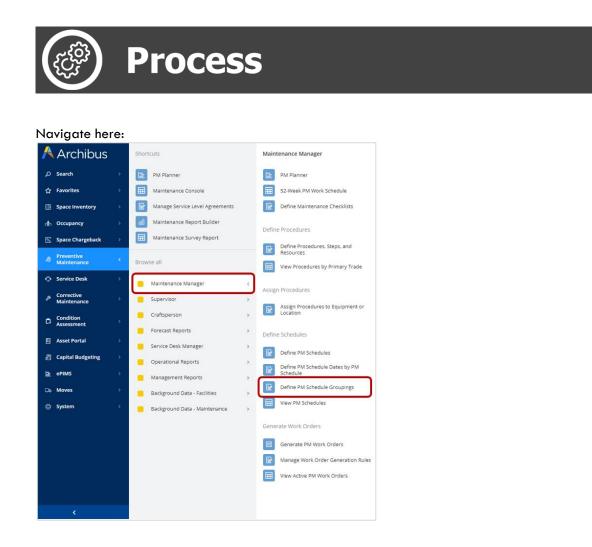
Select PM	M Schedule	Generate Sc	hedule Date	s for Selected Schedu	les Show All 🎄							
PM Sched	dule Code: 1 2039	3856 523311	6 98786 7 9383	3 892572 999471 All 429	9209							
	PM Schedule Code ‡	PM Proce	edure	Equipment Code	Duilding Code	Floor Code	Room Code	PM Schedule Group	Date for	Date of ast PM	Calc. Date for Next PM \$	Manu Date for Next PM
	832860	ACE1PAT	CT1AM-1D		000-0102				16/9/2019	27/9/2022	14/10/2019	
	832861	ACE1PAT	CT1PM-1D		000-0102				16/9/2019	27/9/2022	14/10/2019	
	832862	ACE1PAT	CT2AM-1D		000-0102				16/9/2019	5/10/2022	1/10/2019	
	832863	ACE1PAT	CT2PM-1D		000-0102				16/9/2019	5/10/2022	1/10/2019	
	832864	ACE1PAT	CT3AM-1D		000-0102				16/9/2019	7/10/2022	2/10/2019	
	832865	ACE1PAT	CT3PM-1D		000-0102				16/9/2019	7/10/2022	2/10/2019	
	832866	ACE1PAT	CT4AM-1D		000-0102				16/9/2019	9/10/2022	3/10/2019	
	832867	ACE1PAT	CT4PM-1D		000-0102				16/9/2019	9/10/2022	3/10/2019	
	832868	ACE1PAT	CT5AM-1D		000-0102				16/9/2019	9/10/2022	4/10/2019	
	832869	ACE1PAT	CT5PM-1D		000-0102				16/9/2019	9/10/2022	4/10/2019	
	832899	ACE1PAT	CT6AM-1D		000-0102				16/9/2019	9/10/2022	5/10/2019	
	00000	ACE10AT	CTEDM 1D		000 0102				16/0/2010	0/10/2022	5/10/2010	
Previous	Page 1 of 430	Next										
PM Sche	dule Dates	Add New	Delete Sele	cted								
		PM Scheo	dule Code 🌣	PM Date	٥		e					
0		- (832860	14/10/2019	Ed	it						
			832860	21/10/2019	Ed	it						
_ 			832860	28/10/2019	Ed							



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.



Within this feature, you have the option to:

- Add a new grouping
- Edit an existing grouping
- Delete an existing grouping

8	Define PM S	chedule Groupings		
PM S	chedule Groupings	Add New Delete Selected		
	PM Schedule Group	PM Schedule Group Desc.	A V	0
	ACES LIBRARY PH1	ACES Library PC Phase 1	PM Schedules	Edit
	ACES LIBRARY PH2	ACES Library PC Phase 2	PM Schedules	Edit
	AFSS	AFSS Specific PPMs	PM Schedules	Edit
	AG COOMBS	A.G. Coombs	PM Schedules	Edit
	BESAM AUTODOORS	Besam Autodoors	PM Schedules	Edit
	BRS-NICHEMDI	BRS Niche MDI Suppliers	PM Schedules	Edit
	BRSBOILERCHILLER	BRS Boilers Chillers Off	PM Schedules	Edit



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.

8	Define PM	Schedule Groupings					Sydne)	0	to	0
PM S	chedule Groupings	Add New Delete Selected			Edit PM Schedule Groupings	Save				
	PM Schedule Group	PM Schedule Group Desc.	\$	0		PM Schedule Group* PM Schedule Group Desc.				
	ACES LIBRARY PH1	ACES Library PC Phase 1	PM Schedules	Edit						
	ACES LIBRARY PH2	ACES Library PC Phase 2	PM Schedules	Edit						
	AFSS	AFSS Specific PPMs	PM Schedules	Edit						

Create a New Group

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

🔏 Define PM	Sched	ule Groupin	igs	
PM Schedule Groupings	Add New	Delete Selected		
PM Schedule Group	PM Sc	hedule Group Desc.	\$	
				\odot

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

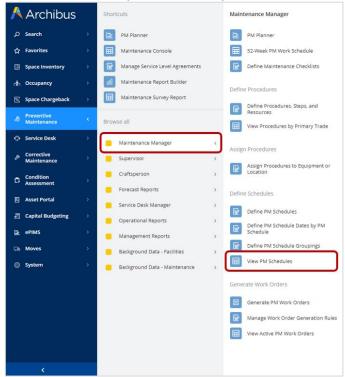
- PM Schedule Group this is the name of the group
- PM Schedule Group Description this is a description of the group

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.

Edit PM Schedule Groupings	Save	
	PM Schedule Group* PM Schedule Group Desc.	



15.8. 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

By Equipment	By Room	By Primary Trade	By Schedule Group	By Service Contrac
Equipment Code	Equip Stand	ment Make lard \$	Building C	ode 👙 Floor Code
2005742	11315	5	M02F	RF
000-13-XS-OSB-14380	-01 14380		000-13	xs
	-01 14380	0	and the second	XS XS
000-13-XS-OSB-14380	0-01 14380 0-02 14380))	000-13	xs

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:



🔏 View PM	A Schedules								😨 SYDNEY	⑦ to	0
By Equipment By	Room By Primary Trade	ary Trade By Schedule Group By Service Contract PM Schedules for: 2005742 🔅									
Equipment Code	Equipment Make Standard	Building Code	Floor Code	PM Schedule Code 🗢	PM Procedure 0	Date for First PM	Date of Last PM	Calc. Date for Next PM	PM Procedure Description	Comments	© PM Sch Gro
2005742	11315	M02F	RF	1009643	ALARM-PM-WKLY	11/11/2022			Fire Alarm Testing-Weekly (AS1851-8:1987)		
000-13-XS-OSB-14380-01		000-13	XS	1009663	TEST-UAT1	17/11/2022		17/11/2022	UAT Test 1		
000-13-XS-OSB-14380-02		000-13	XS								
000-13-XS-OSB-14380-03	3 14380	000-13	XS								



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.

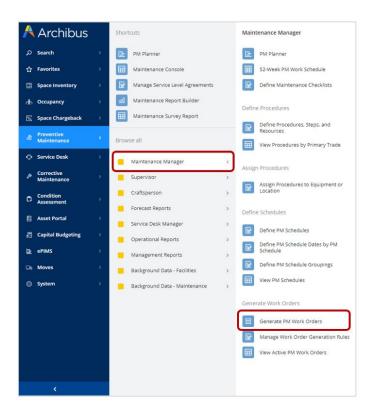


Issue Work Orders



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:

🔏 Generate PM Work Orders	🐯 Sydney 🔿 슎 🐵
Generate Equipment PM Work Orders Generate Location PM Work Orders	
Filter Work Orders Group and Generate Work Orders Generating	lers Review Generated Work Orders

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

Generate Work Orders only for These Criteria Next>>	
	Site Code
	Building Code
	Floor Code
	PM Schedule Group
	Primary Trade
	PM Procedure
	Criticality
Generate Work Orders for PM Schedules Coming Due	
	From* 31/1/2023
	To* 7/2/2023

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:

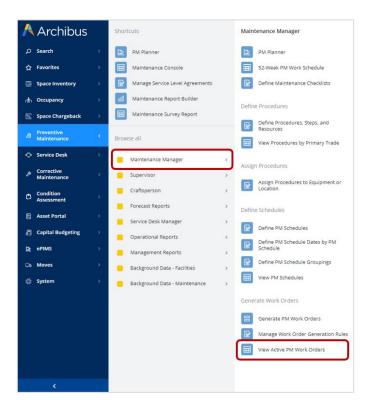
🏀 Generate PM Work Orders	SYDNEY	?	î	0
Generate Equipment PM Work Orders Generate Location PM Work Orders				
Filter Work Orders Group and Generate Work Orders Generating Work Orders Review Generated Work Orders				
Group PM Schedules By Generate < <back< td=""><td></td><td></td><td></td><td></td></back<>				
 One PM Schedule per Work Order Gaupment Code Gaupment Sub-Components Gaupment Standard Site Building Floor Winnay Trade OM Procedure 				
Other Options				
Generate New PM Schedule Dates				

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	e PM Work Orders				SYDNEY 🕐 t	ò
Generate Equipment PM						
Filter Work Orders	Group and Generate Work Orders Generating W	ork Orders Review Generate	d Work Orders			
< <back< td=""><td></td><td></td><td></td><td></td><td></td><td></td></back<>						
Report or Job Name	Result View or File	Percent Complete	Elapsed Time	Estimated Time		
Job Name	Link will be enabled when job finishes.	complete	Time	Remaining		
		95%	00:00.12	00:00.00	Stop Job	
			5% Completed			

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:



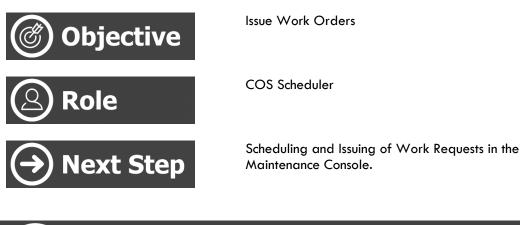


🔏 View /	Active PM Work Orde	ers									SYDNEY SYDNEY	0	6
Filter Show	Clear												
Work Order Numb	per From	Work Or	der Number To			Date To Perform	From		Date	To Perform To			
Primary Work Type	e	Site Cod	e			Building Code			Floor	Code			
Equip. Prev. Maint.	~												
PM Schedule Grou	ıp	Primary	Trade Required			Status							
						Assigned or Issued	v						
Work Orders	Paginated Report					Trade Require	ements for: 6027458						
ork Order Code ≑	Primary Work Description		≎ Work Order Priority ≎	Date to Perform 🔅	Primary Wo Type	Trade Code 🔅	Date Scheduled 🗘	Estimated Hours 🗘	Date Finish	ied 0 Stra	aight time Trade Hours ¢	Additio	nal Comm
						FRESECTECH	11/8/2020	0.25					
618443	Preventive Maintenance for Tuesday Au	gust 11	1	11/8/2020	Equip. Pr								
623976	Preventive Maintenance for Sunday Oct		1	11/10/2020	Equip. Pr	Labor Assignm	ments for: 6027458						
623987	Preventive Maintenance for Thursday C	ctober 2	1	29/10/2020	Equip. Pr	Craftsperson	Date Tradesper	rson	Estim.	Date	. Actual	Additio	nal Comm
627099	Preventive Maintenance for Friday Janu	ary 15,	1	15/1/2021	Equip. Pr	Code	Assigned	÷	Hours ¢	Finished	⊕ Hours ⊕		
629652	Preventive Maintenance for Wednesday	December	1	9/12/2020	Equip. Pr	DYARAGIN	12/8/2022		0.17				
629655	Preventive Maintenance for Saturday D	ecember 1	1	12/12/2020	Equip. Pr	THNGUYEN	11/8/2020		0.25	11/8/2020	0.25		
Not all records are sh													
Work Requests for	r: 618443												
Work Request Code 韋	Date to Date Work Equipmen Perform \Leftrightarrow Completed \Leftrightarrow	it Code 💠 1	Work Request Status 🗘	Work Description	on								
			~										
				Clean camera									



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 <u>Section 8 - COS Issue a Work Order to a</u> <u>Contractor</u> for detailed instructions.







16. Preventative Maintenance SLAs

16.1. SLA – Hard and Soft Services





16.2. SLA – Security Electronics / Locksmiths

SLAs by PM Type

PM Work Requests for Electronic Security and Locksmithing only





16.3. SLA – Security Services





17. Specific Rules – PPM Work Requests

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

Exceptions

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.



Security



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.

All Soft Services PPM Work Requests must be

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 **<u>Shared Service Centre</u>**.

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

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