

BUSINESS MANAGER JOB AID

The Business Manager's involvement in work requests will normally begin with an e-mail from Archibus stating their approval is required on the request. First, the Business Manager will log into Archibus to access the request needing approval.

The screenshot shows the Archibus Business Manager Home interface. At the top left is the Archibus logo and 'Business Manager Home'. On the right, there are links for 'Sign Out' and 'Help', and a search bar labeled 'Find a form or report'. The main content area is divided into several sections: 'Service Requests' (with links for 'Request Service (Work Request)', 'Approve/Review Active Work Requests', 'Review All Billed Work', and 'Review All Closed Work'), 'Alerts' (with '0 Requests: Needing Approval' and '0 Work Requests Open for One Week'), 'Help' (with 'What is ARCHIBUS Quick-Start?', 'Learning Path for Space', and 'Learning Path for Building Operations'), 'Space Reports' (with 'Occupancy Plan', 'Campus Building List', 'Campus Building List with Room Data', 'View Rooms by Department per Floor', 'Location of Work Requests', and 'Vacancies by Department'), and 'Business Management' (with 'Schedule Substitutes'). A blue callout bubble with the number '1' points to the 'Approve/Review Active Work Requests' link.

1. Once logged in, click on “Approve/Review Active Work Requests” on the Business Manager Home screen. This action will take you to the Building Operations Console where approval or rejection can be accomplished.

The screenshot shows the Archibus Building Operations Console. At the top, there is a navigation bar with 'ARCHIBUS', 'Business Manager Home', and 'Tasks'. On the right, there are links for 'Sign Out' and 'Help', and a search bar. Below the navigation bar is a 'Request Service' button. The main area is a table of work requests. The table has columns for 'Work Request #', 'Work Order #', 'Problem #', 'Location', 'Work Description', 'Work Team Code', 'Shop Priority', 'Requested', and 'Due'. The table is filtered to show 'Requested' items. A blue callout bubble with the number '2' points to the 'Approve/Reject' button in the 'Requested' section of a work request row.

Work Request #	Work Order #	Problem #	Location	Work Description	Work Team Code	Shop Priority	Requested	Due	
201600464			ABATEMENT - REMOVAL/AS INDICATED BELOW	50111300	Business Manager Approval	NONE: No effect on safety, health, environment...	9/29/2015		
201600401	301600401		ABATEMENT - REMOVAL/AS INDICATED BELOW	50121100	ABATEMENT (HAMILTON)	NONE: No effect on safety, health, environment...	9/21/2015		
201600362	301600363		ABATEMENT - TESTING/AS INDICATED BELOW	50121100	ABATEMENT (HAMILTON)	NONE: No effect on safety, health, environment...	9/17/2015		
201600241	301600241		TRASH/LITTER/PROVIDE DESCRIPTION BELOW	50112100-04-410	LANDSCAPE SERVICES (COTTRELL)	NONE: No effect on safety, health, environment...	8/28/2015		
201600221	301600221		DRAINS/PROVIDE DESCRIPTION BELOW	50123300	ZONE MAINT (ZONE 6) (HANLEY)	NONE: No effect on safety, health, environment...	8/26/2015		
201600222	301600222		KEYS/KEYPAD/PROVIDE DESCRIPTION BELOW	50110700	LOCK & KEY SERVICES (BLAIR)	NONE: No effect on safety, health, environment...	8/26/2015		
201600142	301600341		ABATEMENT - TESTING/AS INDICATED BELOW	50119300-02-202A	ABATEMENT (HAMILTON)	NONE: No effect on safety, health, environment...	8/4/2015		
201600064	301600321		AHB/PRIVATE INVOICE	50119300-02-202A	ALUMNI MEMORIAL BUILDING (SATTERFIELD)	NONE: No effect on safety, health, environment...	7/10/2015		
201504025	301503366			50117300	Repair spare mcquay a/c unit-78A0536501	A/C SVCS (A/C SERVICES) (WOLFENBARGER)	NONE: No effect on safety, health, environment...	2/11/2015	
201500406	301500295			50120700-01	Recore room 127AB - 4 keys needed	LOCK & KEY SERVICES (BLAIR)	NONE: No effect on safety, health, environment...	1/7/2015	
201600201	301600201		AIR CONDITIONING/PROVIDE DESCRIPTION BELOW	50110600-01-101	ASHLEY TEST 8/20	ZONE MAINT (ZONE 9) (POE)	NONE: No effect on safety, health, environment...	8/20/2015	
201504453	301503770			50110600-02	Keisha Gracius	ZONE MAINT (ZONE 9) (POE)	MOD-HIGH: Moderate disruption/Part of mission l...	3/4/2015	
201503007	301502489			50117300-07	Fire alarm going off on 7th floor	ELECTRICAL SVCS (BUILDING SECURITY SYSTEMS) (TA...	NONE: No effect on safety, health, environment...	2/3/2015	
201501773	301501414			50119900-02-K217	recore room K217. 3 keys needed	LOCK & KEY SERVICES (BLAIR)	NONE: No effect on safety, health, environment...	1/22/2015	

2. From the Building Operations Console, the Business Manager can click on the Work Request Number to view the details of the request. They may also change the GL Account or Fund Code ID if needed (see below). Work Description will also be editable. Here, you can add information such as estimate requests. If any changes are made, you must click “Update Request” to save the information.

Work Request

Work Request Summary

Work Request # 201600464

Work Team Code

Shop Priority NONE: No effect on safety, health, environment, mission

Problem Location

EDITABLE DESCRIPTION

Work Order #

Problem Type ABATEMENT - REMOVALIAS INDICATED BELOW

Description Business Manager Approval

General Details

Requested by HENDERSON, CAROL ANN H -

Priority Default

Location 50111300--

Building Name Ayres Hall

GL Account 436100

Status Requested

Is Chargeable?

Document 1 Upload a document

Document 3 Upload a document

GL ACCOUNT

Requested For

Date Requested 09/29/2015

Time Requested 4:04 PM

College ID 70180

Fund ID E018003

Equipment Code

Ready for Bill?

Document 2 Upload a document

Document 4 Upload a document

FUND ID

Workflow History

Estimated Labor

Actual Labor

No records to display.

Parts / Material

Tools

Other Resources

Total Costs

Estimated Costs	Actual Costs	Apply Upcharge	Upcharge Costs
Estimated Cost of Parts 0.00	Cost of Parts 0.00	Parts Upcharge? Yes	Parts Upcharge Cost 0.00
Estimated Cost of Labor 0.00	Cost of Labor 0.00	Project Management Upcharge? No	Project Management Upcharge Cost 0.00

Update Request
Close

CLICK TO SAVE CHANGES

ARCHIBUS
Business Manager Home
Tasks
FS.CUSTBIM
Sign Out Help

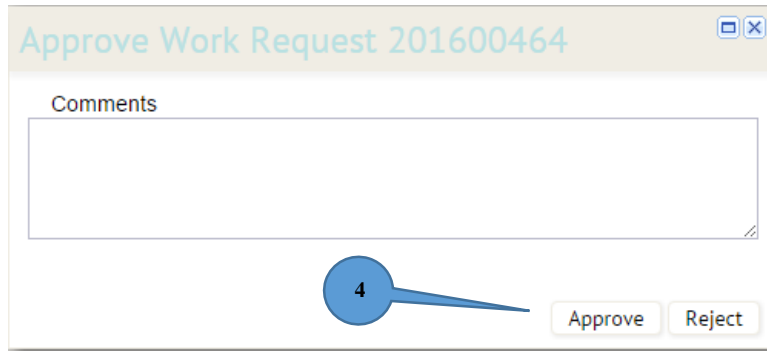
Building Operations Console
Request Service

Show: All
Building
Floor
Room
Problem Type
More
Clear
Filter
Recent
Group By: Status

0 selected

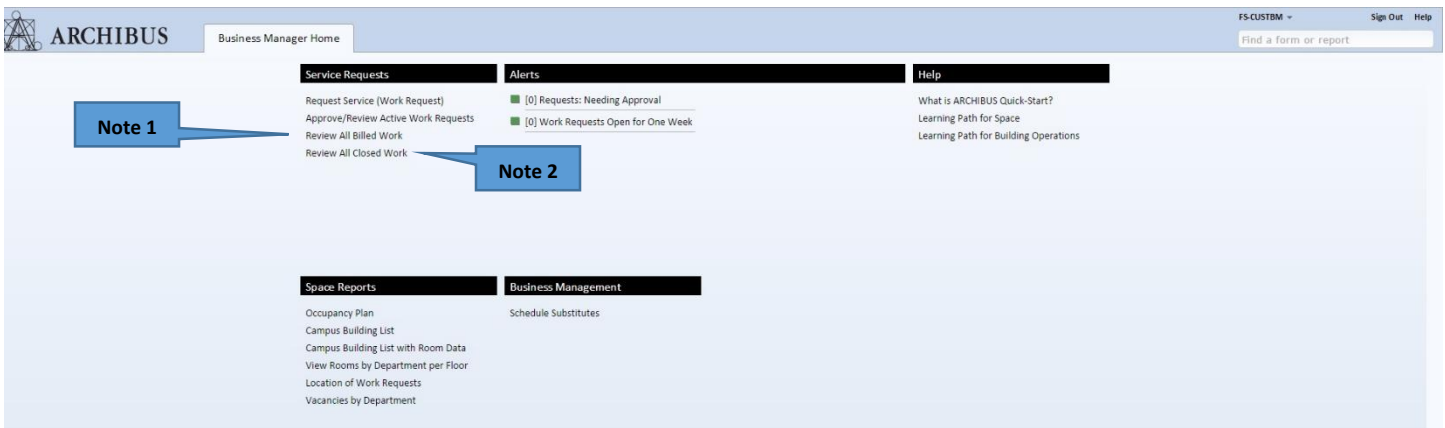
Work Request #	Work Order	Problem Type	Location	Work Description	Work Team Code	Shop Priority	Requested	Due
Requested (1)								
201600464		ABATEMENT - REMOVALIAS INDICATED BELOW	50111300	Business Manager Approval		NONE: No effect on safety, health, environment...	9/29/2015	
Assigned to Work Order (9)								
201600401	301600401	ABATEMENT - REMOVALIAS INDICATED BELOW	50121100	ABATEMENT (HAMILTON)		NONE: No effect on safety, health, environment...	9/21/2015	
201600362	301600363	ABATEMENT - TESTINGAS INDICATED BELOW	50121100	Kevin GARLAND 9/17	ABATEMENT (HAMILTON)	NONE: No effect on safety, health, environment...	9/17/2015	
201600241	301600241	TRASH/LITTER/PROVIDE DESCRIPTION BELOW	50122100-04-410	Please remove the trash which is here. Please e...	LANDSCAPE SERVICES (COTTRELL)	NONE: No effect on safety, health, environment...	8/28/2015	
201600221	301600221	DRAINS/PROVIDE DESCRIPTION BELOW	50123300	drain clogged Please Estimate first	ZONE MAINT (ZONE 6) (HANLEY)	NONE: No effect on safety, health, environment...	8/26/2015	
201600222	301600222	KEYS/KEYPAD/PROVIDE DESCRIPTION BELOW	50110700		LOCK & KEY SERVICES (BLAIR)	NONE: No effect on safety, health, environment...	8/26/2015	
201600142	301600341	ABATEMENT - TESTINGAS INDICATED BELOW	50119300-02-202A	Testing Business Manager Approval	ABATEMENT (HAMILTON)	NONE: No effect on safety, health, environment...	8/4/2015	
201600064	301600321	AMB/PRIVATE INVOICE	50119300-02-202A	Another test of the approval step	ALUMNI MEMORIAL BUILDING (SATTERFIELD)	NONE: No effect on safety, health, environment...	7/10/2015	
201504025	301503366		50117300	Repair spare mcquay a/c unit-78A0356301	A/C SVCS (A/C SERVICES) (WOLFENBARGER)	NONE: No effect on safety, health, environment...	2/11/2015	
201500406	301500295		50120700-01	Recore room 127AB. 4 keys needed	LOCK & KEY SERVICES (BLAIR)	NONE: No effect on safety, health, environment...	1/7/2015	
Issued and In Process (8)								
201600201	301600201	AIR CONDITIONING/PROVIDE DESCRIPTION BELOW	50110600-01-101	ASHLEY TEST 8/20	ZONE MAINT (ZONE 9) (POE)	NONE: No effect on safety, health, environment...	8/20/2015	
201504453	301503770		50110600-02	Keisha Gracius	ZONE MAINT (ZONE 9) (POE)	MOD-HIGH: Moderate disruption/Part of mission l...	3/4/2015	
201503007	301502489		50117300-07	Fire alarm going off on 7th floor	ELECTRICAL SVCS (BUILDING SECURITY SYSTEMS) (TA...	NONE: No effect on safety, health, environment...	2/3/2015	
201501773	301501414		50119900-02-K217	recore room K217. 3 keys needed	LOCK & KEY SERVICES (BLAIR)	NONE: No effect on safety, health, environment...	1/22/2015	

3. Click the "Approve/Reject" button to take the appropriate action with the work request. A small window (as seen below) will appear.



4. The Business Manager may approve or reject the work request by clicking the appropriate button in the new window. They may also add comments related to the work request. Should the Business Manager select Reject, the work request will be removed from the system.

Reporting for the Business Manager



Note 1: “Review All Billed Work” shows only transactions billed in IRIS. See next page for an example of the new window which will appear.

Note 2: “Review All Closed Work” shows transactions billed in IRIS and work done with no charge. See next page for an example of the new window which will appear.

ARCHIBUS Business Manager Home Tasks - FS-CUSTOM - Sign Out Help

Search Billed Work Orders Find a form or report Search Show All

From Work Order Fund ID From Date Created To Work Order Shop Code To Date Created Primary Work Type Archibus Batch ID Building Code IRIS Doc Number

Review Billed Work Orders XLS

Work Order #	Building Code	Building Name	Fund ID	Primary Work Description	Total Cost	Cost of Labor	Cost of Parts	Cost of Tools	Other Costs	Date Work Order Completed	Contact
201400028	50119900	Hess Hall	E018140	Repair cold water line.		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	WEST, MI
30150028940	50119900	Hess Hall	E018003	Repair broken railing located on top of brick w...	\$436.00	\$436.00	\$0.00	\$0.00	\$0.00		WARWIC
301500295	50110700	Nash Research Building	E018003	Recore room 127AB. 4 keys needed	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00		
301500804	50123000	Humes Hall	E018003	Assist morristown sprinkler with sprinkler testing	\$66.00	\$66.00	\$0.00	\$0.00	\$0.00	1/30/2015	
301500842	50120000	Hess Hall	E018003	Stuck on 14th floor	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00		
301500871	50111800	Tower and Plaza	E018003	12th floor hall call button staying on	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00		
301501034	50110100	Austin Peay Building	E018003	THE WEST ELEVATOR IS STUCK ON THE 5TH FLOOR- CA...	\$44.00	\$44.00	\$0.00	\$0.00	\$0.00		
301501166	50122500	Holt Avenue Apartments Residence Hall	E018003	Recore student room 923. 3 keys needed	\$29.25	\$22.00	\$0.00	\$0.00	\$0.00	7/25 1/26/2015	
301501171	50122700	Reese Hall	E018003	Recore student room 406CD. 4 keys needed	\$35.20	\$29.00	\$0.00	\$0.00	\$0.00	\$6.20 2/6/2015	
301501177	50119900	Hess Hall	E018003	I have a problem with ants in my bathroom. They...	\$14.50	\$14.50	\$0.00	\$0.00	\$0.00	\$0.00 2/12/2015	
301501255	50122700	Reese Hall	E018003	WEST ELEVATOR AT REESE HALL STUCK ON 4TH FLOOR...	\$88.00	\$44.00	\$0.00	\$0.00	\$0.00	\$0.00 1/30/2015	
301501256	50122800	Carrick Hall North	E018003	NORTH CARRICK ELEVATOR #2 STUCK ON 11TH FLOOR- ...	\$88.00	\$44.00	\$0.00	\$0.00	\$0.00	\$0.00 1/30/2015	
301501332	50113500	Frank G Clement Hall	E018003	Please send to Randy Hamilton in Sanitation Ser...	\$29.00	\$29.00	\$0.00	\$0.00	\$0.00		
301501334	50123000	Humes Hall	E018003	Please send to Randy Hamilton in Sanitation Ser...	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00		
301501336	50119900	Hess Hall	E018003	Recore room J619. 3 keys needed	\$27.15	\$22.00	\$0.00	\$0.00	\$0.00	\$5.15 1/26/2015	
301501338	50123100	Carrick Hall South	E018003	please send to plumbing shop to assist maintena...	\$864.31	\$642.00	\$220.11	\$0.00	\$0.00	\$0.00 2/9/2015	
301501340	50119900	Hess Hall	E018003	Recore room H326. 3 keys needed	\$27.15	\$22.00	\$0.00	\$0.00	\$0.00	\$5.15 1/26/2015	
301501410	50119900	Hess Hall	E018003	Recore room H438. 3 keys needed	\$27.15	\$22.00	\$0.00	\$0.00	\$0.00	\$5.15 1/26/2015	
301501412	50119900	Hess Hall	E018003	Recore room K054. 3 keys needed	\$27.15	\$22.00	\$0.00	\$0.00	\$0.00	\$5.15 1/26/2015	
301501414	50119900	Hess Hall	E018003	recore room K217. 3 keys needed	\$27.15	\$22.00	\$0.00	\$0.00	\$0.00	\$5.15	
301501811	50123100	Carrick Hall South	E018003	please send to plumbing shop to add a couple of...	\$1,378.95	\$1,336.00	\$0.00	\$0.00	\$0.00	\$42.95 2/13/2015	
301502126	50122500	Holt Avenue Apartments Residence Hall	E018003	there is a big leak by the kitchen sink, unsure...	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00		
301502128	50122500	Holt Avenue Apartments Residence Hall	E018003	there is a big leak by the kitchen sink, unsure...	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00		
301502129	50122500	Holt Avenue Apartments Residence Hall	E018003	there is a big leak by the kitchen sink, unsure...	\$72.00	\$72.00	\$0.00	\$0.00	\$0.00	\$0.00 2/10/2015	

Note 3: Clicking "Details" to the left of the work order number will open a new window similar to the one seen below. From the new window, you will be able to select and print a Summary Report, Labor Report or a Material Report.

Available Reports

Work Order Summary Report Labor Report Material Report

Work Order # 201400028 Number of Open Requests 1

Primary Work Description Repair cold water line.

Lock Work Order Unlocked

Work Order Ready for Bill? No

Primary Trade Required College ID 70180

Work Order is Chargeable? No

Building Code 50119900

GL Account

Fund ID E018140

Progress

Date Work Order Created 01/5/2015 Time Work Order Created 6:32 PM

Date to Perform

Date Work Order Issued 01/5/2015 Time Work Order Issued

Date Work Order Completed Time Work Order Completed

Costs

Cost of Labor 0.00 Cost of Parts 0.00

Cost of Tools 0.00 Other Costs 0.00

Total Cost 0.00

Example of a Report Available to the Business Manager

BIRT Report Viewer

Showing page 1 of 1

PROJECT SUMMARY (WO #301501338) FACILITIES SERVICES

Building: Carrick Hall South
Contact: Descr: please send to plumbing shop to assist maintenance with hot water problem with shower. j.s.
Created: January 21, 2015
Ready to Bill? Yes

LABOR COST	PARTS COST	TOOLS COST	OTHER COST	UPCHRG COST	TOTAL COST
\$656.00	\$220.11	\$0.00	\$0.00	\$2.20	\$878.31

WR #	Requested	Completed	Requested For	Phone	Fund	Tot. Cost	Status
201501692	1/21/15	2/4/15	HENDERSON, CAROL ANN H - 112146	965 974-2397	E018003	\$878.31	Com

Work Team: PLUMBG & HEATG SVCS (PLUMBING SVCS) (CURNUTT)
Requestor: SISNEROS, TIMOTHY JAMES -

please send to plumbing shop to assist maintenance with hot water problem with shower. j.s.

Oct 9, 2015, 4:10 PM

Page 1 / 1

Close

HOW TO SCHEDULE SUBSTITUTES

ARCHIBUS Business Manager Home

FS-CUSTBM Sign Out Help

Find a form or report

Service Requests

- Request Service (Work Request)
- Approve/Review Active Work Requests
- Review All Billed Work
- Review All Closed Work

Alerts

- [0] Requests: Needing Approval
- [0] Work Requests Open for One Week

Help

- What is ARCHIBUS Quick-Start?
- Learning Path for Space
- Learning Path for Building Operations

Space Reports

- Occupancy Plan
- Campus Building List
- Campus Building List with Room Data
- View Rooms by Department per Floor
- Location of Work Requests
- Vacancies by Department

Business Management

- Schedule Substitutes

1

1. It may be necessary to select a substitute to fill in the event a Business Manager is absent. From the Business Manager Home, click “Schedule Substitutes” under Business Management.

ARCHIBUS Business Manager Home

Tasks -

FS-CUSTBM Sign Out Help

Find a form or report

Schedule Workflow Substitutes

Workflow Substitutes Add New Refresh

Employee Name

Substitute Employee No.

2

2. Click “Add New” on the Workflow Substitutes screen.

Workflow Substitutes Save Delete Cancel

Step 1: Choose either an employee or a craftsperson for which you want to define a substitute, and select the substitute for that employee or craftsperson.
Step 2: Select the workflow step or role for the substitute.
Step 3: Select the date range that the substitute may perform work. Note that if the date range is left empty, the substitute is considered permanent.

Employee Name ... **3**

Craftsperson Employee Code ...

Substitute For
Approve **5**

Start Date Unavailable ...

Comments **6**

Substitute Employee Name ... **4**

Substitute Craftsperson Name ...

End Date Unavailable ...

7

- Using the ellipses button, select the name of the employee who will be absent.
 - Using the ellipses button, select the name of the employee to act as a substitute.
 - Select the level of approvals for the substitute.
 - Enter start and end dates.
- Note: If no dates are entered, the substitute will remain activated until removed.
- Click the "Save" button.