

# ARCHIBUS SELF-SERVICE WORKPLACE PORTAL USER GUIDE

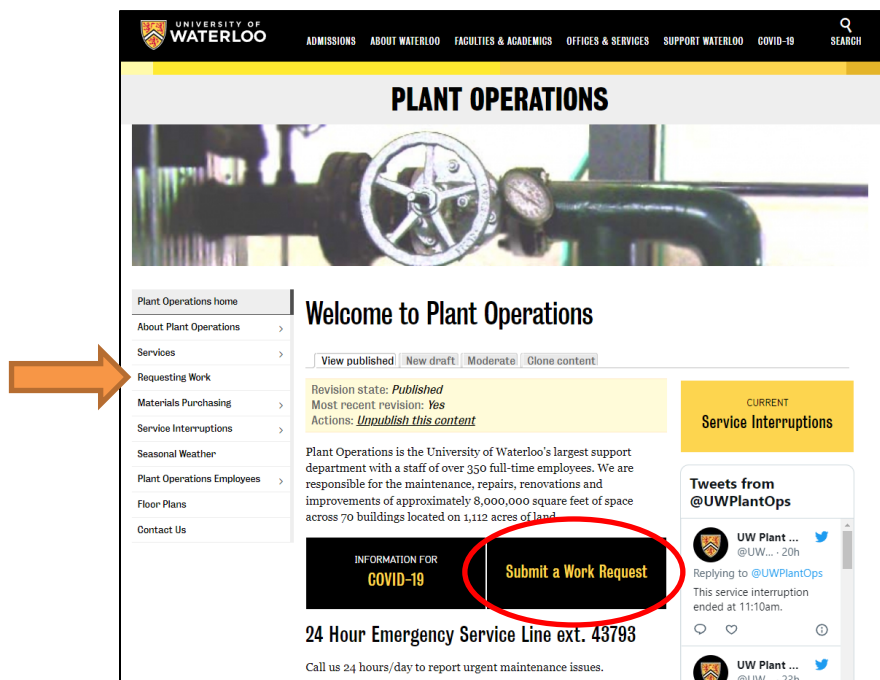
## Requesting work from Plant Operations

The following is a user guide for UW faculty and staff requesting work from Plant Operations via the Archibus Workplace Portal. Please review information on [Billable Work vs. Maintenance & Operations](#) to see what is considered billable or non-billable work.

### STEP 1 ACCESSING ARCHIBUS WORKPLACE PORTAL

There are two options for accessing the system.

1. The first method is by going to the [Plant Operations home page](#).
  - a. Click on **Requesting work** in the menu or click on the **Submit a Work Request** button to go to the [Requesting Work page](#).



Then, click on [Initiate a Request](#).

**Requesting Work from Plant Operations**

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Revision state: *Published*  
Most recent revision: *Yes*  
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Plant Operations is experiencing significant delays in our supply chain. The tool crib works diligently to obtain needed parts however this is a global issue. Completion of work orders that require parts may be delayed. Please limit inquiries for work orders as supervisors work to advance all requests. Thank you for your patience!

**For emergency requests, please call us directly via our 24-hour service line at 519-888-4567 ext. 43793.**

All other requests (including those for routine and billable work within maintenance, grounds and custodial, as well as for design & construction) should be submitted online through Plant Operations' [Archibus Workplace Portal](#). Using your university credentials, the portal processes your request directly into our integrated workplace management system (Archibus), and allows you to track the status of your request after it is submitted.

Please note that we have eliminated the previous online form for billable work requests, as such requests are now also submitted via the Archibus Workplace Portal. If your work request is assigned to the Design & Construction section, the system will auto-generate a temporary Archibus Work Request number. However, it will then be set up as a traditional Design Work Request in Plant Operations and receive a formal project (work request) number within the Design section, and a further notification will follow. All other requests (not assigned to Design) will continue to be visible in Archibus for status updates.

**INITIATE A Request**

INFORMATION ON **Billable Work vs. Maintenance & Operations** | **Design Status Reports**

SELF-SERVICE **User Guide** | HOW-TO **Training Videos**

WORKPLACE PORTAL **Frequently Asked Questions**

b. You can also click directly on the [Initiate a Work Request](#) link in the website footer.

UNIVERSITY OF WATERLOO

**Plant Operations**  
General Services Complex  
24 Hour Maintenance and Service Line ext. 43793

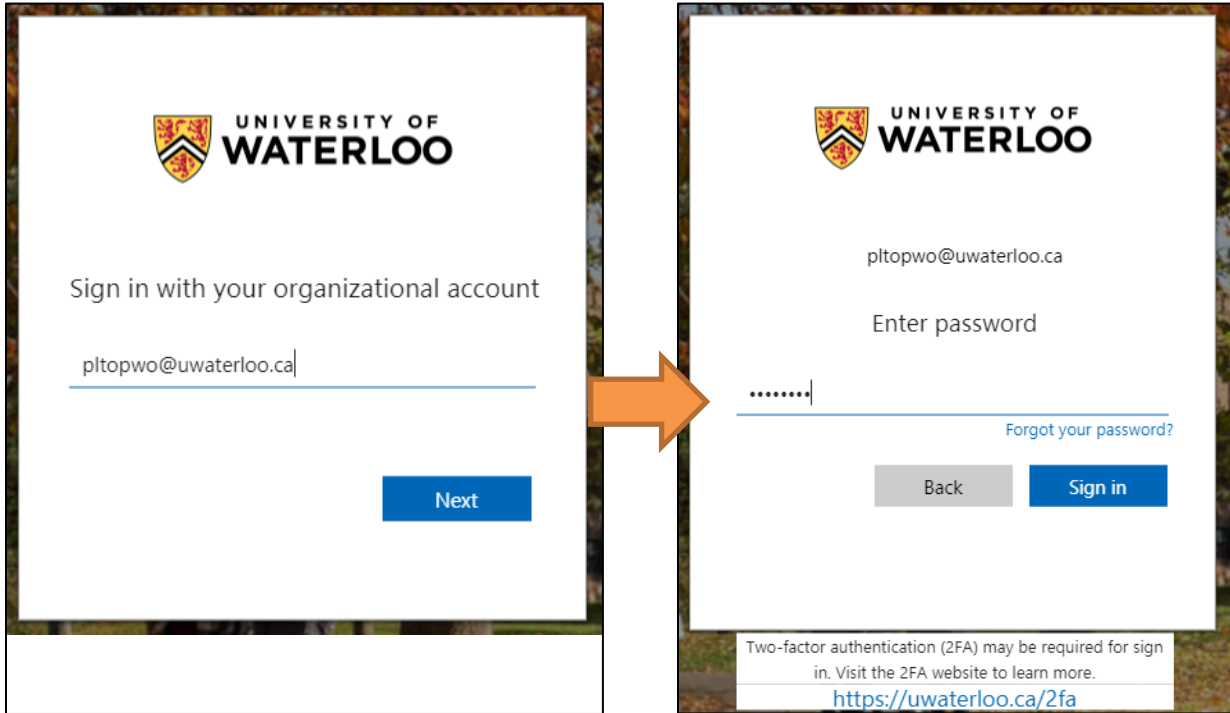
Follow @uwplantops 68 followers

**Quick Links**  
[Report a Problem](#)  
[Initiate a Work Request](#)  
[Contact Us](#)

- Alternatively, you can enter the URL directly into your browser (\*Chrome is the recommended browser):  
<https://uwaterloo.iwmsapp.com/archibus>

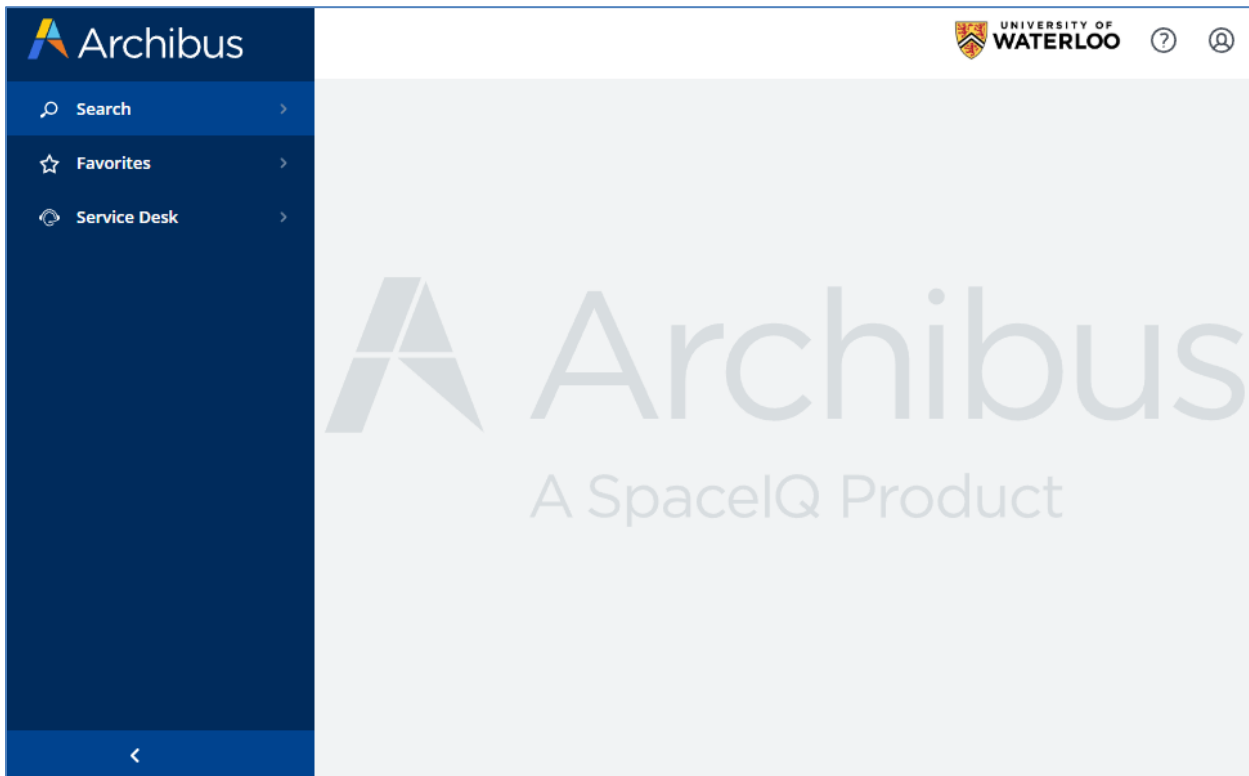
**STEP 2**    **LOGGING IN**

You will now be directed to the UW ADFS login page. Enter your UWaterloo credentials.



**STEP 3** ARCHIBUS WEB CENTRAL

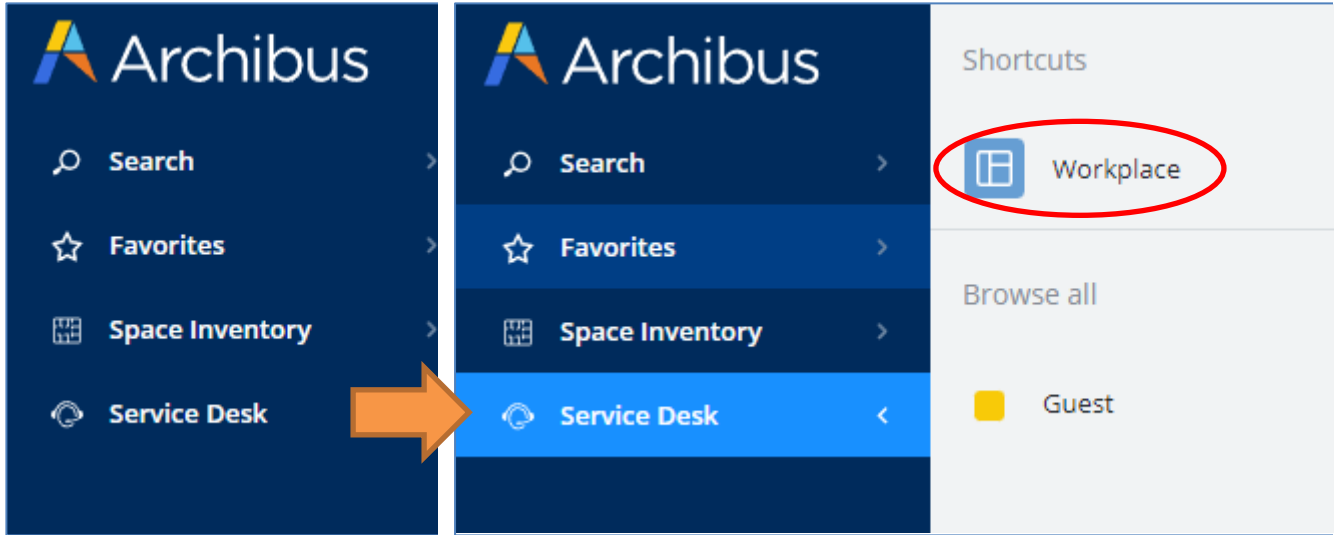
You will be brought to the main Archibus navigation screen.



- \* Navigation options will vary depending on whether you are a department Space Planner or general campus Client.

## Space Planner View

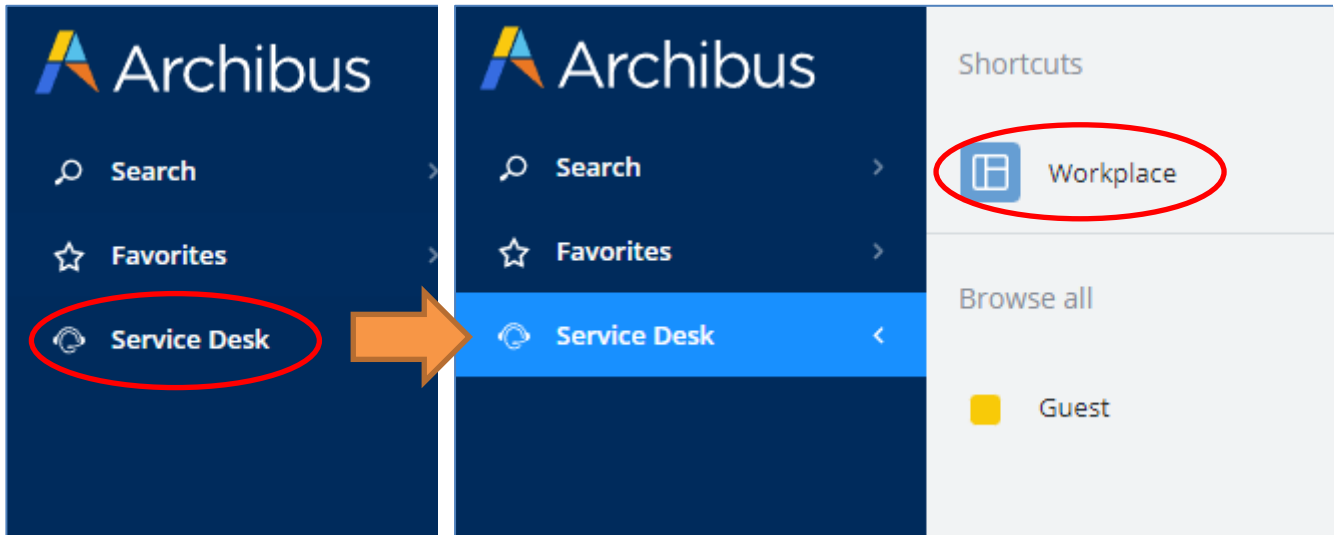
1. Select Service Desk to expand a side window.
2. Click on the Workplace link in the menu that opens to the right.



\* All previously accessible space reporting options are available when selecting Space Inventory

## General Campus Client

1. Select Service Desk to expand a side window.
2. Click on the Workplace link in the menu that opens to the right.











## STEP 4 WORKPLACE PORTAL NAVIGATION

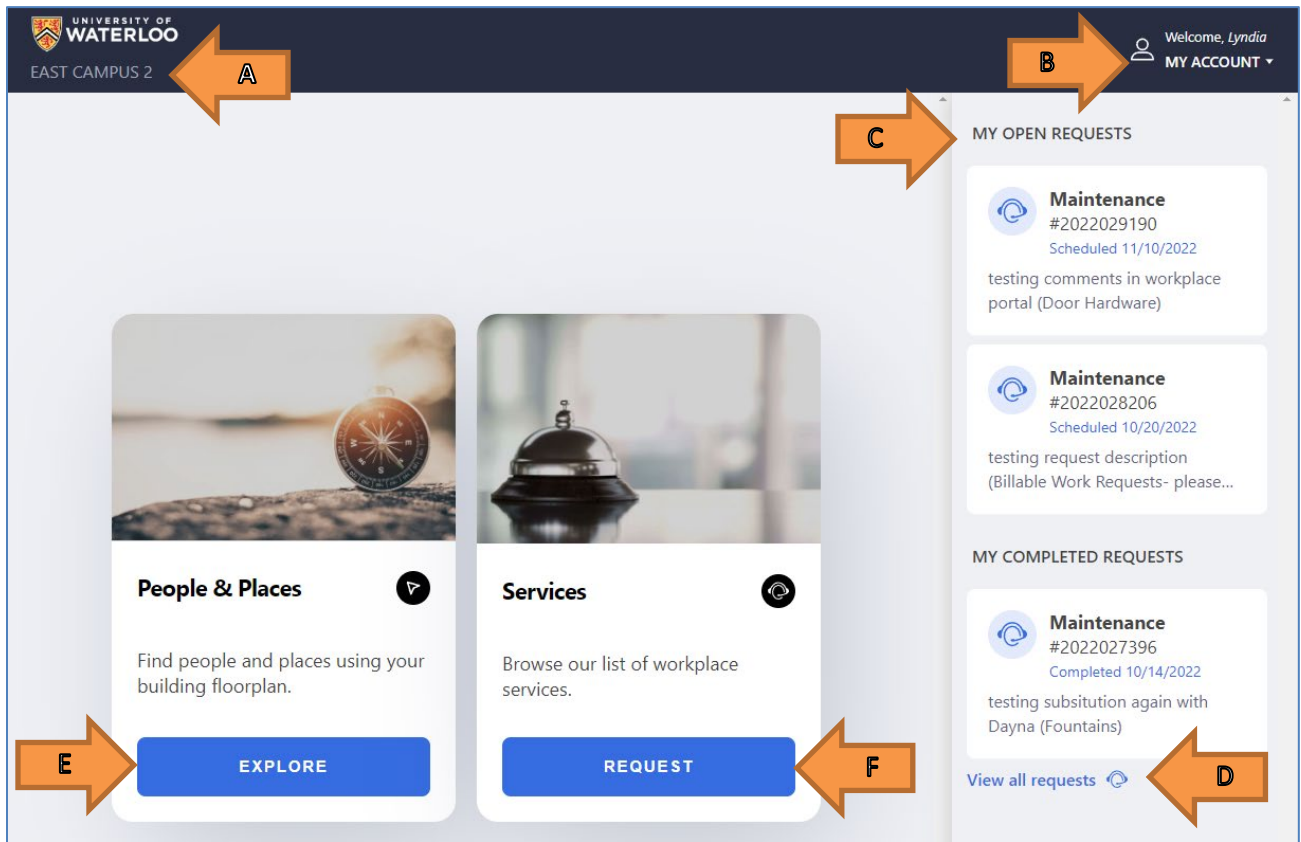
1. Selecting Workplace will open a new browser window. You may be asked to select a Building each time you go into the Workplace Portal. This will be your default location when creating a work request, but it can be changed later in the work request form. Scroll down the list to find the building you want or start typing out the name of the building (acronyms are not accepted) in the search bar to filter the list. You could also search for the building number, if known. If this screen does not show, then you may already have a default building associated with your profile.

Search for a building

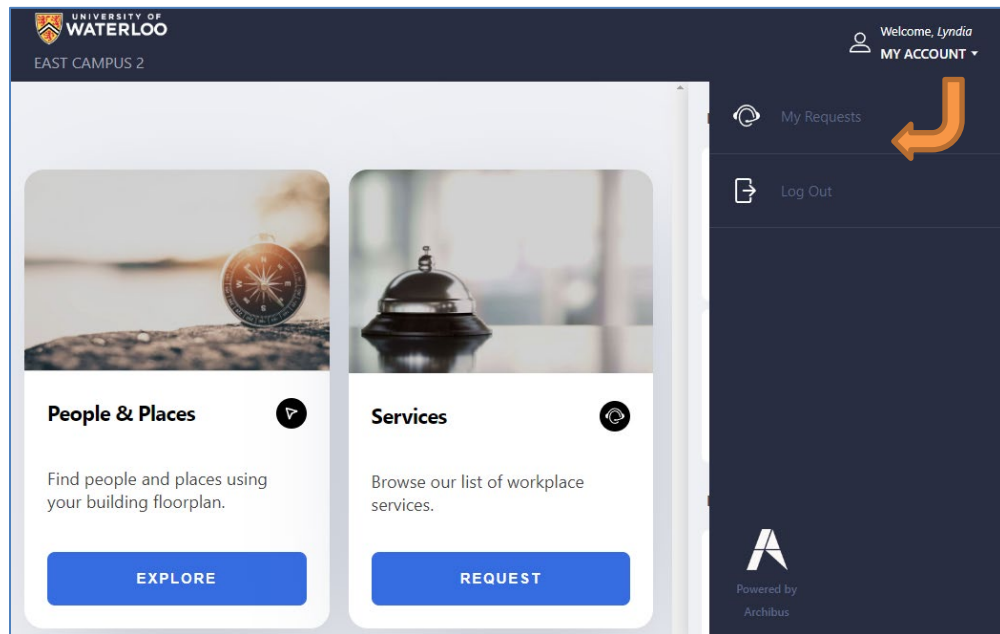
### Select a Building

-  **DOUGLAS WRIGHT ENGINEERING BUILDING (001)**  
Waterloo, ON
-  **ENGINEERING 2 (002)**  
Waterloo, ON
-  **ENGINEERING 3 (003)**  
Waterloo, ON
-  **PHYSICS (004)**  
Waterloo, ON
-  **MODERN LANGUAGES (005)**  
Waterloo, ON
-  **EARTH SCIENCES & CHEMISTRY (006)**  
Waterloo, ON
-  **BIOLOGY 1 (007)**  
Waterloo, ON
-  **DANA PORTER ARTS LIBRARY (008)**  
Waterloo, ON

2. After a building has been selected, you will be taken to a landing page.



- A. Default building selection (can be changed when creating a work request).
- B. **My Account** – Click on this dropdown to see a menu to a list of your work requests with basic information or to log out of Workplace Portal.

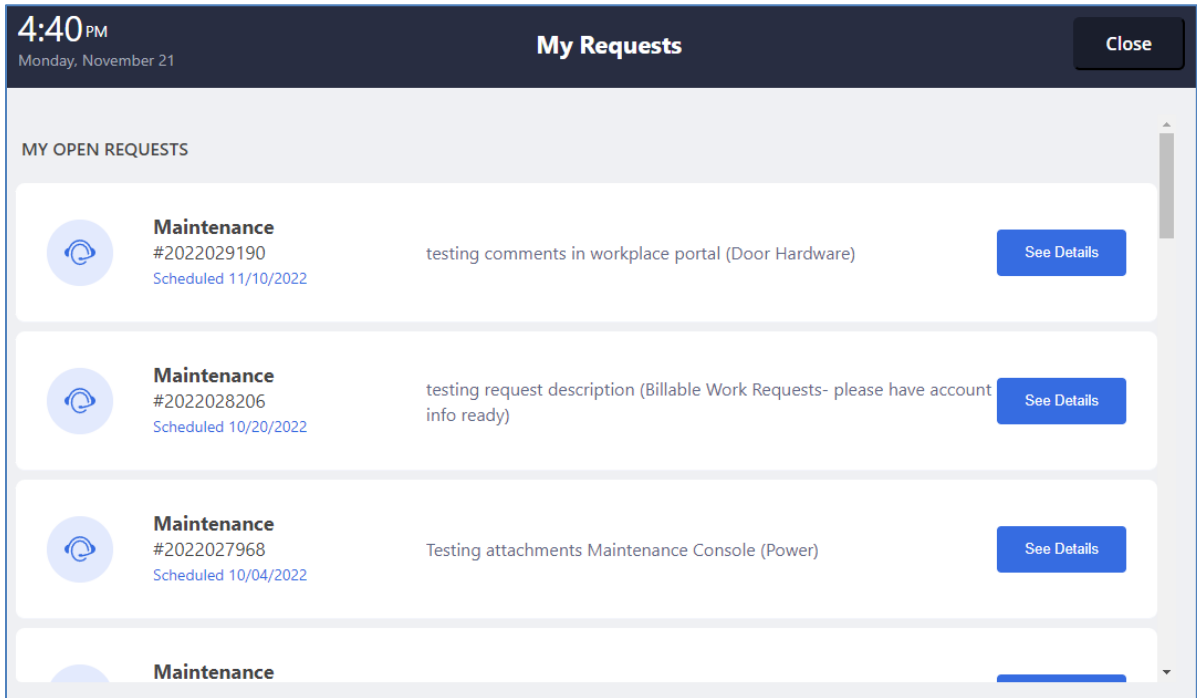


- C. A dashboard on the right side of the screen will show a summary list of any open and completed requests created by you (displays work request number and a clip of the work description). Clicking on a specific work request here will bring up some basic information on the work request. Please note, no comments will show under the Comments section at the bottom of the screen for clients.

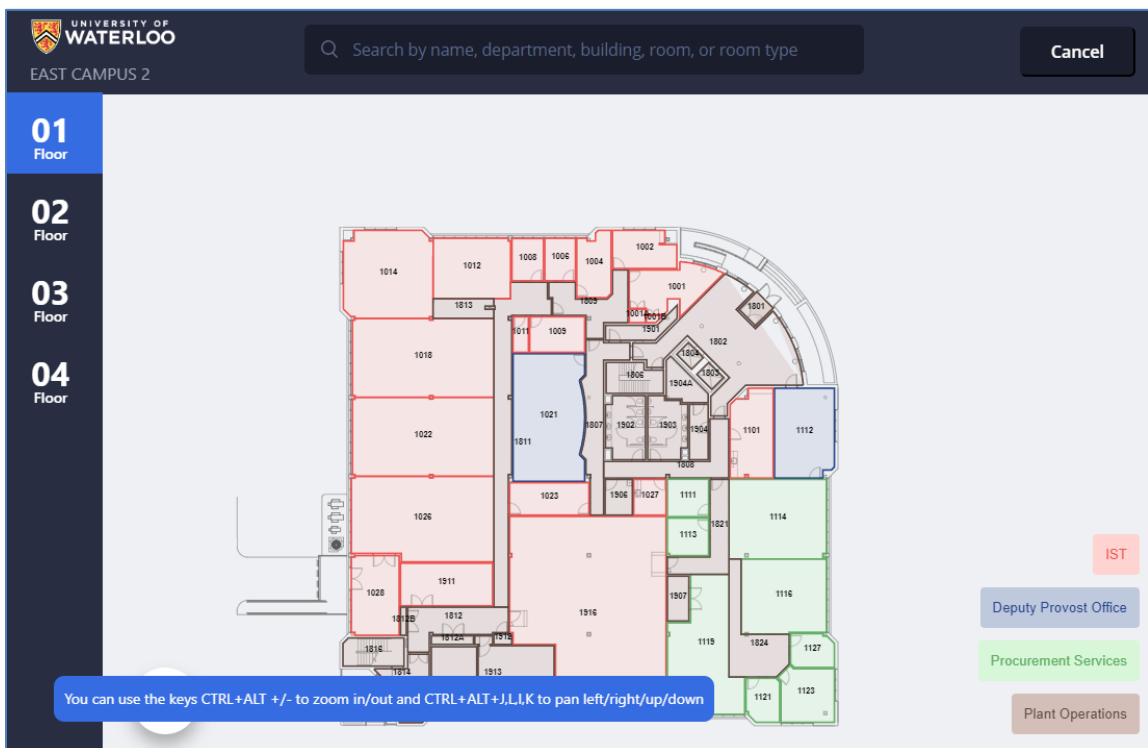
The screenshot shows a web interface for a work request. At the top, a dark blue header contains the time '4:37 PM', the date 'Monday, November 21', the title 'Door closure/latch', the request ID 'Request #2022029190', and a 'Close' button. The main content area is white and features a progress bar with three stages: 'Requested' (11/10/2022), 'Scheduled' (11/10/2022), and 'Completed'. Below the progress bar is a 'Request description' section with a text box containing 'testing comments in workplace portal (Door Hardware)'. Further down are fields for 'Building' (ENGINEERING 3), 'Floor' (01), and 'Location' (1136). There are also sections for 'Specific location', 'Equipment code', and 'Attachments'. At the bottom, a 'Comments and Activity' section has two tabs: 'Comments' (selected) and 'All Activity'.



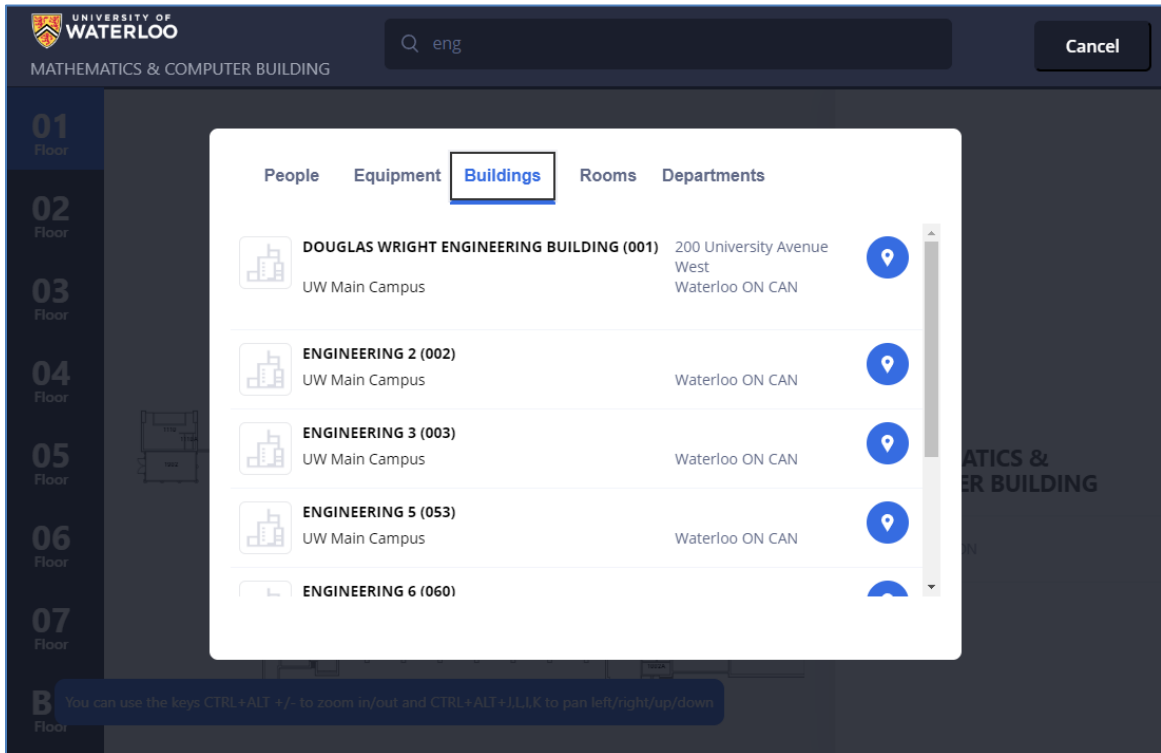
- D. Click on **View all requests** to view a list of your requests with some basic information. To view more detailed information on your work requests, see the section on Web Central view in Step 5.



- E. Click on the **Explore** button under People & Places to view building maps to assist you with locating a room. On the left side of the screen, you can select between floors.

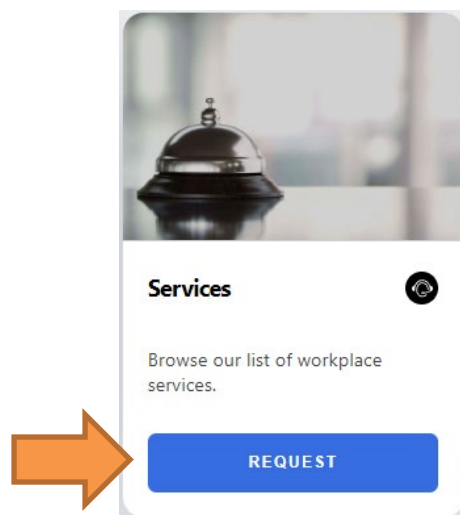


To select a different building, start typing the full name of the building in the search bar. Then switch between the different tabs that become available depending on what text was entered (People, Equipment, Buildings, Rooms, Departments), as needed. General clients can ignore the Equipment tab.

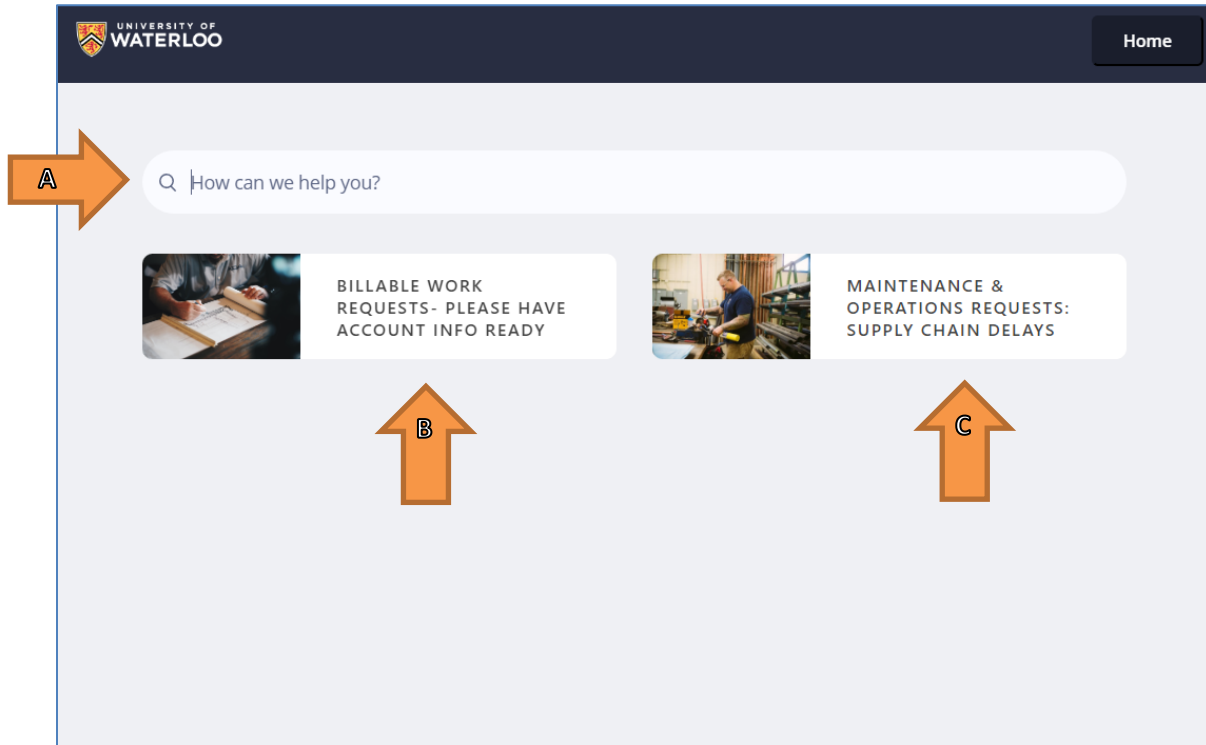


\* Archibus does not currently store most staff/faculty locations in order to locate a person. This is currently functioning for floorplan viewing only.

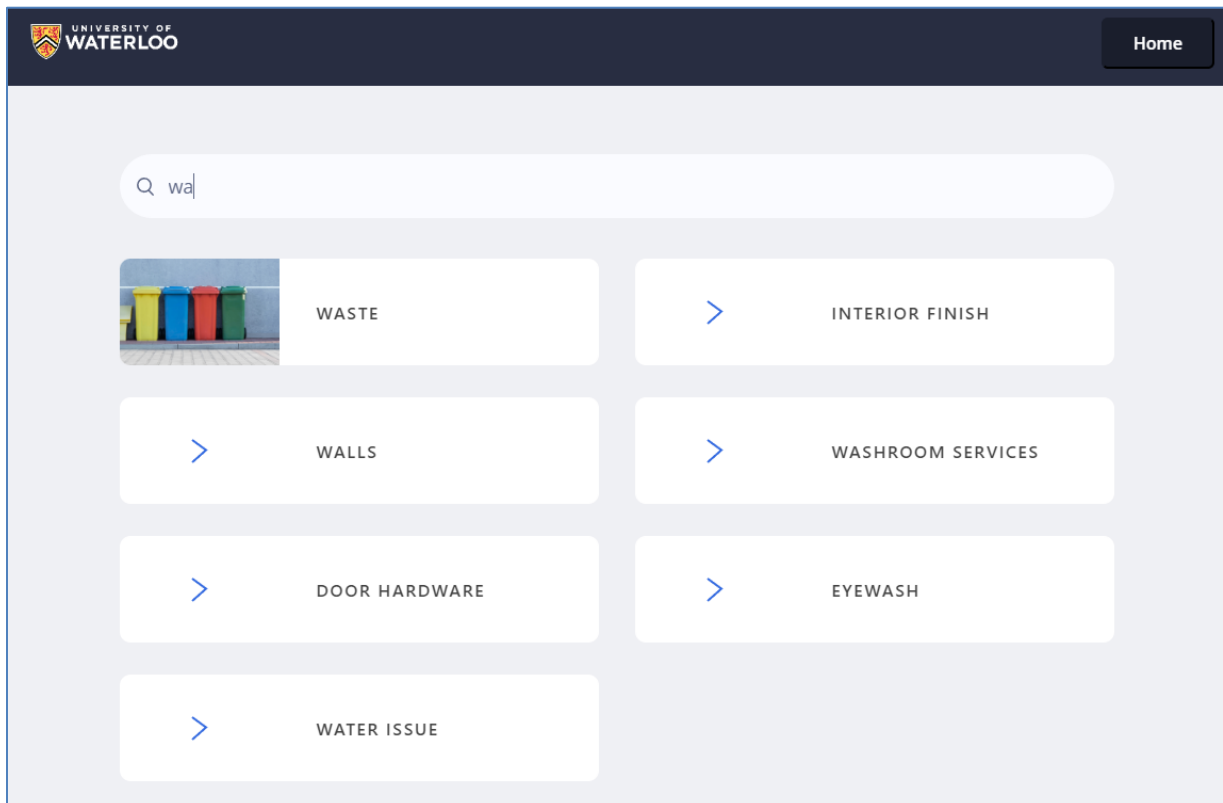
F. Click on the **Request** button under Services when you are ready to create a work request.



3. Select **Billable** or **Maintenance**, depending on the type of work required (refer to the [Billable Work vs. Maintenance & Operations information](#)).



- A. **Search Bar** – Entering key words here will bring up a list of related service buttons.



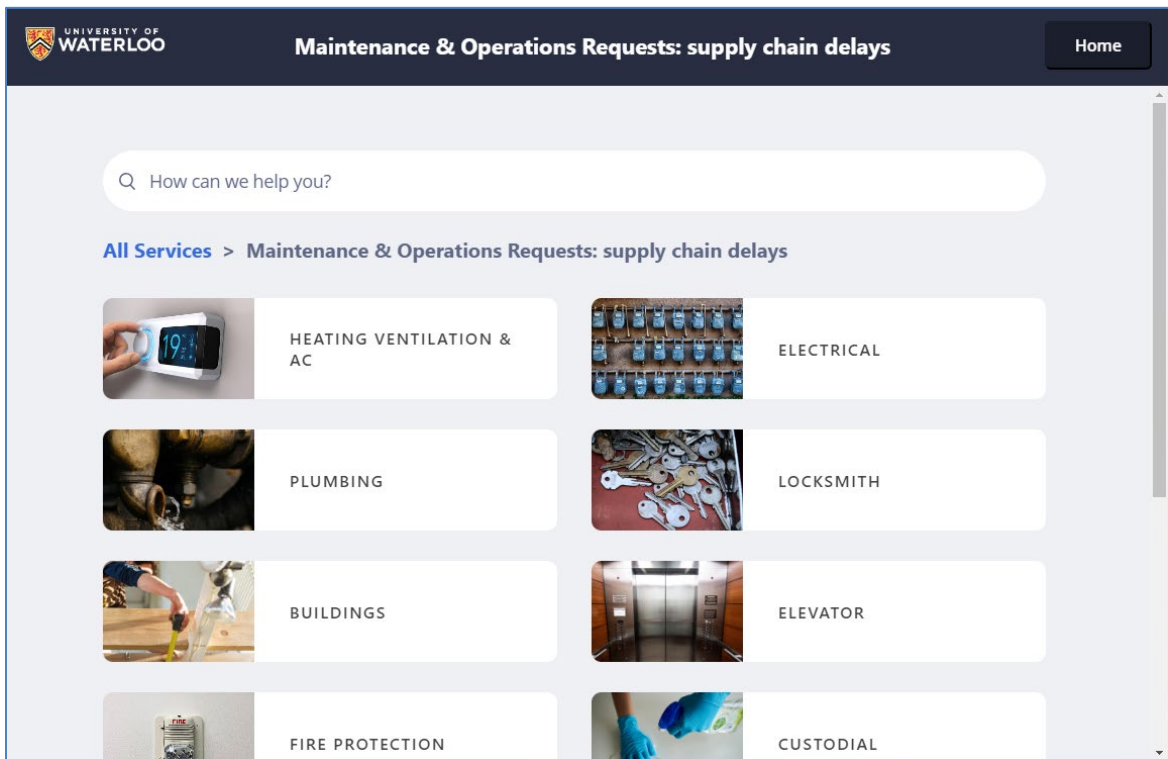
B. **Billable Work Requests** – For billable maintenance/operations and Design and Construction projects.

- \* These are items beyond building and infrastructure services such as renovations, upgrades, fabrication, furnishings, and events. Refer to the [Billable Work vs. Maintenance & Operations information](#).

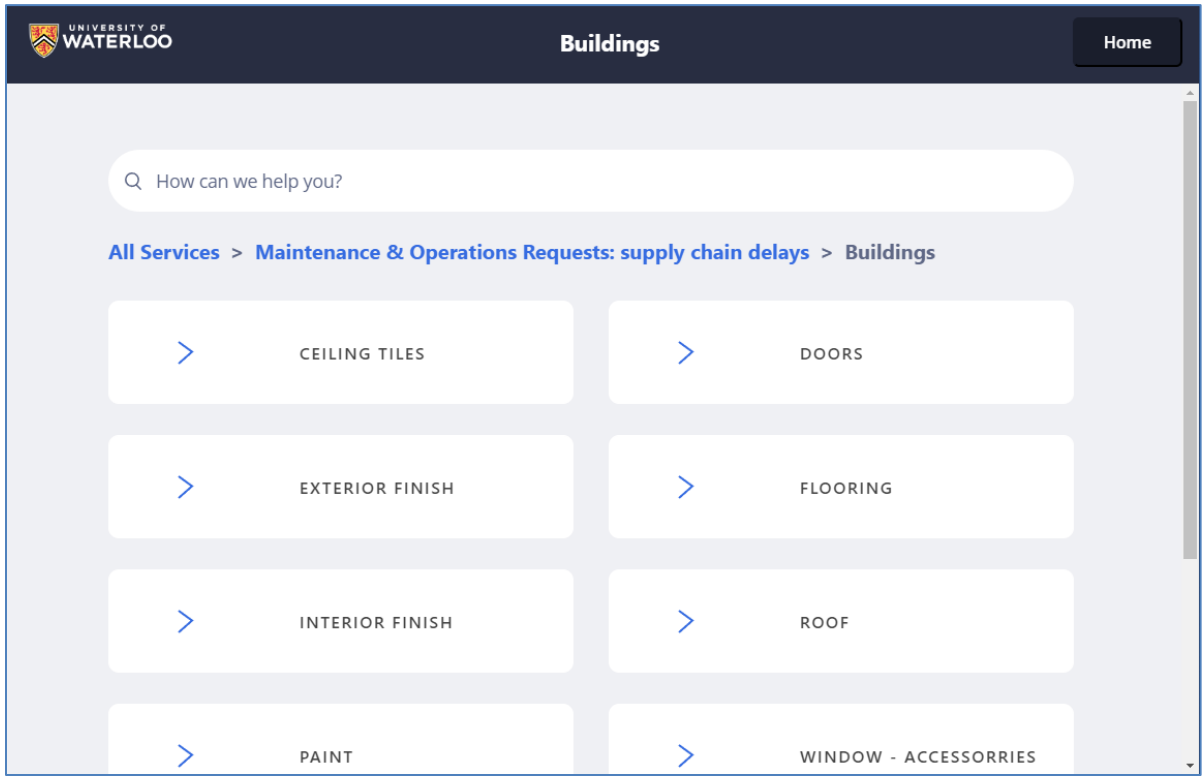
C. **Maintenance & Operations Work Requests** – For base/non-billable maintenance, custodial, and grounds requests.

- \* These are functions most typically handled by a landlord. Refer to the [Billable Work vs. Maintenance & Operations information](#).

Selecting this option will bring up the first tier of options for maintenance requests.



Clicking on certain problem types (e.g. Buildings) will bring up a second tier of request types.



- \* Some request types will take you to an external URL if a form is required or if the service is not provided by Plant Operations.

**STEP 5**    **CREATE A REQUEST**

Once you've selected the appropriate request type, **Create a Request** page will open.

The main difference between the Billable request form and the Maintenance request form is that the Billable request form requires the account information.

**2:56 PM**  
Tuesday, November 22

**Billable Work Requests- please have account info ready: Location** Cancel

Create a Request  
Billable Work Requests- please have account info ready

Please provide as much detail when outlining the requested scope of work and location. Include Org, Account, Work Order, Activity and On Site Contact if different from requestor - name, number, email. Multiple locations can be indicated in the Request description.

Additional Contact

Additional Contact Phone

\* Required Information  
Request description\*

4000 characters maximum allowed, including new line characters

Building\*

Floor

Location

Account Code

Org Unit

Unit 4 Work Order Activity #  
12345-67890-123

Specific Location

50 characters maximum allowed, including new line characters

Account information

3:36 PM  
Tuesday, November 22

**Ceiling Tiles: Location**

Cancel

---

Create a Request  
Ceiling Tiles

**A** → Please provide a detailed description eg. damaged, missing, stained

**B** → Additional Contact

Additional Contact Phone

\* Required Information  
Request description\*  
**C** → Missing two ceiling tiles  
4000 characters maximum allowed, including new line characters

**D** → Building\*  
GENERAL SERVICES COMPLEX

Floor  
Second Floor

Location  
262 – Administrative Office Areas

**E** → Specific Location  
Near back stair exit  
50 characters maximum allowed, including new line characters

Next →

- A. Pay attention to any specific instructions or warnings here.
- B. The person logging into Workplace Portal is the Requestor, but you can also enter in an **Additional Contact**. The Additional Contact field could be used in a variety of ways: 1. You are submitting the request on behalf of someone else, 2. Someone else wants to receive the financial information, 3. There is someone else who also wants to receive notifications for the work request.

- C. Enter a detailed description of your work/request. To make it easier for your request to be processed, please start the description with the Building and Room number(s). If the problem affects more than one room, list them here. Try to indicate the magnitude of the problem (e.g. slow drip or heavy flow).
- D. From the drop-down menus, select the building (type out full name) and floor from the pop-up windows.

**Ceiling Tiles: Location**

Create a Request  
Ceiling Tiles

Please provide a detailed description eg. damaged, missing, etc.

Additional Contact

Additional Contact Phone

\* Required Information

Request description\*  
Missing two ceiling tiles

4000 characters maximum allowed, including new line characters

Building\*  
GENERAL SERVICES COMPLEX

Floor  
Second Floor

Location  
262 – Administrative Office Area

Specific Location  
Near back stair exit

50 characters maximum allowed, including new line characters

Next

**Select a building**

Search

- MODERN LANGUAGES (005)  
Waterloo, ON
- GENERAL SERVICES COMPLEX (014)  
Waterloo, ON
- MINOTA HAGEY RESIDENCE (023)  
Waterloo, ON
- J.G. HAGEY HALL OF THE HUMANITIES (024)  
Waterloo, ON
- GROUND STORAGE BUILDING V2 (087)  
Waterloo, ON

Showing first 100 records

**Select a floor**

Search Floors

- First Floor - 01  
GENERAL SERVICES COMPLEX
- Second Floor - 02  
GENERAL SERVICES COMPLEX
- Basement - B1  
GENERAL SERVICES COMPLEX



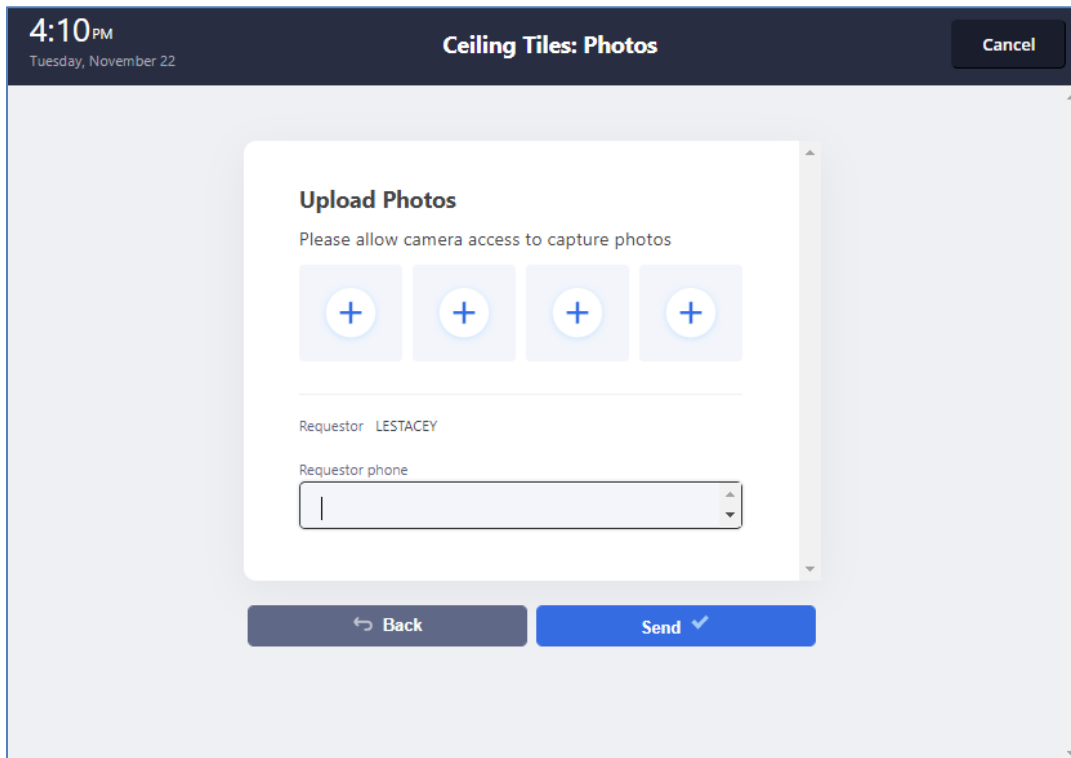
Click on the Location pin icon to select a room from the floorplan. Click on **Select Location** to confirm.

The screenshot displays a software interface for selecting a location. At the top left, the time is 3:56 PM on Tuesday, November 22. The main title is 'Select Location'. On the left sidebar, there are three floor options: '01 Floor', '02 Floor' (which is selected and highlighted in blue), and 'B1 Floor'. The main area shows a floorplan of the 'GENERAL SERVICES COMPLEX - Floor 02' with various rooms numbered. Room 213 is highlighted in blue. On the right side, there is a panel for room 213, titled '213 - Administrative Office Areas'. It lists 'Department: Plant Operations' and 'Occupants: None'. At the bottom of this panel is a blue button labeled 'Select Location'. A 'Cancel' button is located at the top right of the interface.

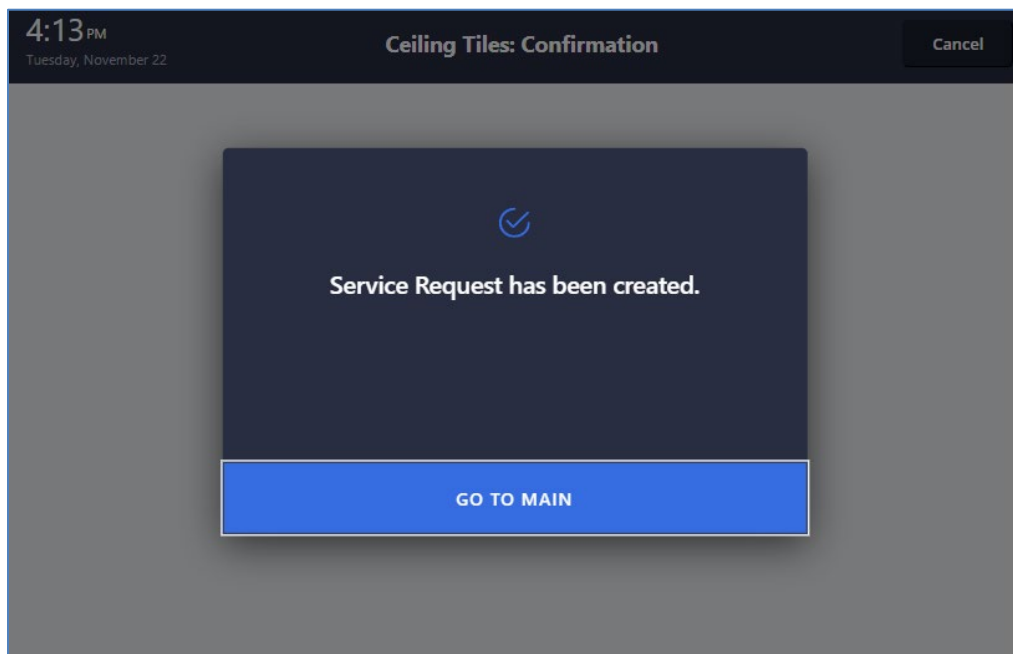
E. Add more specific details about the location of the problem.

Click on **Next** to proceed to the next screen.

The next screen will allow you to upload any photos and prompts for your phone number or extension. This is necessary in case the trade staff need to follow up.



Select **Send** to finish creating the request.



Depending on the request type, you will receive one of two notification emails. You will receive these emails for all status changes of the request (e.g. Issued, Completed).

**Example notification for Issued status:**

**From:** notifications@iwmsapp.com <notifications@iwmsapp.com>

**Sent:** Thursday, October 6, 2022 10:51 AM

**To:** Dayna Chan <d8chan@uwaterloo.ca>

**Subject:** [No-Reply] Status of Work Request with id 2022031808 Problem Type: BILLABLE-BUILDINGS | MISC changed to Issued and In Process

The following work request was issued on 2022-10-06.

Requester: LYNDIA LITTLE

Requested By:

Org Unit: 1234

Account Code: 67890

Unit 4 Account Info: 10000-10000-100

Work Team: ZONE\_2\_BUILDINGS

Description: GSC 262, move location of signage "Plant Operations" to GSC 201. Also, outside GSC 203, remove sign that reads "Reception" and move to GSC 201. Any questions can be directed to Lyndia Little in GSC 201. Thanks

Problem Location:

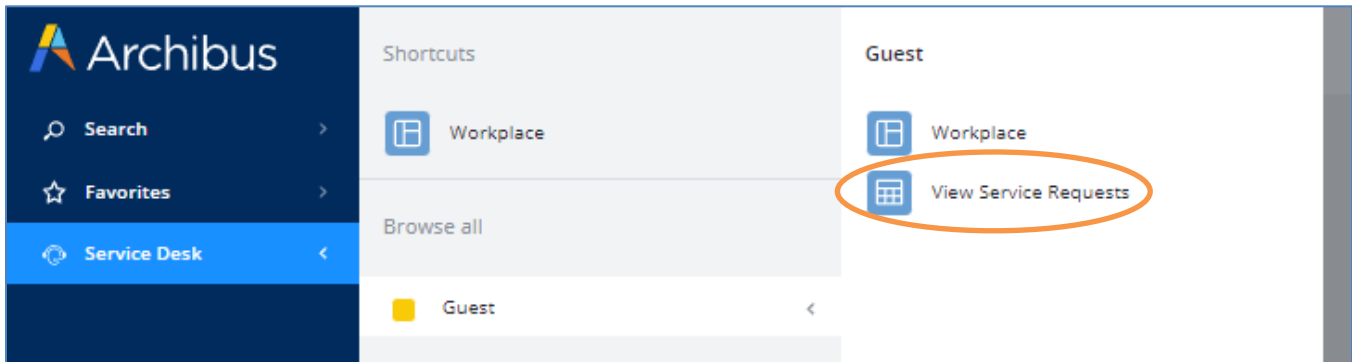
**\*\*ATTENTION\*\***

Your billable work request has been reviewed and assigned to the appropriate Work Team's queue. The initial review can take anywhere up to 5 days, with a completion timeline within 30 days. Please note, timing for field work completion will depend on scope, workload, access to space, availability of trades and material delivery lead times.

If you require more information regarding your request, please contact the Work Request Administrators at [pltops.workrequests@uwaterloo.ca](mailto:pltops.workrequests@uwaterloo.ca).

## STEP 5 REVIEW WORK

To review the status and more details about your requests in Web Central, go back to **Web Central** tab and select **View Service Requests** from the Service Desk menu.



This will bring up a list of your active work requests. You can search for specific requests by entering the Work Request Code, Building Code, or a date range of when the request was created.

The screenshot shows the 'View Service Request' page in Archibus. The page has a search filter section at the top with fields for Request Type, Status, Date Requested From, Date Requested To, Work Request Code, and Building Code. Below the filters is a table listing service requests.

	Service Request ID	Work Request Code	Building Code	Requested By	Created By	Additional Contact	Request Type	Problem Type	Status	Date Requested
Select	149285	2022029305	014	LESTACEY	LESTACEY		SERVICE DESK - MAINTENANCE	BUILDING FINISH INTERIOR	IN PROGRESS	2022-11-22
Select	149150	2022029190	003	LESTACEY	LYNDIA LITTEL	DBCHAN	SERVICE DESK - MAINTENANCE	LOCKSMITH HARDWARE	IN PROGRESS	2022-11-10
Select	148146	2022028206	003	LESTACEY	LYNDIA LITTEL		SERVICE DESK - MAINTENANCE	BILLABLE REVIEW	APPROVED	2022-10-20
Select	147906	2022027968	001	LESTACEY	LYNDIA LITTEL		SERVICE DESK - MAINTENANCE	ELECTRICAL POWER	IN PROGRESS	2022-10-04
Select	147905	2022027967	001	LESTACEY	LYNDIA LITTEL		SERVICE DESK - MAINTENANCE	HVAC ROOM TEMPERATURE	IN PROGRESS	2022-10-04
Select	147447	2022027447	017	LESTACEY	LYNDIA LITTEL		SERVICE DESK - MAINTENANCE	ARCHIBUS PLANT OPS	APPROVED	2022-10-03
Select	147446	2022027446	017	LESTACEY	LYNDIA LITTEL		SERVICE DESK - MAINTENANCE	BILLABLE REVIEW	APPROVED	2022-10-03
Select	147396	2022027396	003	LESTACEY	LYNDIA LITTEL		SERVICE DESK - MAINTENANCE	PLUMBING DRINKING FOUNTAIN	COMPLETED	2022-09-30
Select	147395	2022027395	002	LESTACEY	LYNDIA LITTEL	DBCHAN	SERVICE DESK - MAINTENANCE	PLUMBING WATER ISSUE	APPROVED	2022-10-14
Select	147152	2022027152	001	LESTACEY	LYNDIA LITTEL		SERVICE DESK - MAINTENANCE	MECHANICAL	APPROVED	2022-09-29
Select	147149	2022027149	001	LESTACEY	LYNDIA LITTEL		SERVICE DESK - MAINTENANCE	PLUMBING LEAK	APPROVED	2022-09-29
Select	147145	2022027145	001	LESTACEY	MUNIZA ABIDI		SERVICE DESK - MAINTENANCE	BUILDING FINISH INTERIOR	IN PROGRESS	2022-09-29
Select	147132	2022027132	003	LESTACEY	LYNDIA LITTEL	CDYCK	SERVICE DESK - MAINTENANCE	LOCKSMITH	IN PROGRESS	2022-09-28
Select	147128	2022027128	017	LESTACEY	LYNDIA LITTEL	CDYCK	SERVICE DESK - MAINTENANCE	DISPATCH	APPROVED	2022-09-28
Select	147127	2022027127	003	LESTACEY	LYNDIA LITTEL		SERVICE DESK - MAINTENANCE	BILLABLE REVIEW	APPROVED	2022-09-28
Select	147126	2022027126	008	LESTACEY	LYNDIA LITTEL	BCOLUSSI	SERVICE DESK - MAINTENANCE	BILLABLE-BUILDINGS BOARDS	IN PROGRESS	2022-09-28
Select	147109	2022027109	014	LESTACEY	LYNDIA LITTEL		SERVICE DESK - MAINTENANCE	HVAC ROOM TEMPERATURE	IN PROGRESS	2022-09-27
Select	147108	2022027108	029	LESTACEY	LYNDIA LITTEL		SERVICE DESK - MAINTENANCE	BILLABLE REVIEW	APPROVED	2022-09-28
Select	147107	2022027107	003	LESTACEY	LYNDIA LITTEL	SAHETT	SERVICE DESK - MAINTENANCE	PLUMBING DRINKING FOUNTAIN	APPROVED	2022-09-28

Clicking on **Select** by a work request will show you the work request details.

The screenshot shows the 'View Service Request' page in Archibus. The 'Request' tab is active, displaying details for request ID 149285. The 'Work Location' section shows Campus ID UW, Building Code 014, and Problem Location 'Near back stair exit'. The 'Description' section shows Request Type 'SERVICE DESK - MAINTENANCE', Status 'IN PROGRESS', and Description 'Missing two ceiling tiles (Ceiling Tiles)'. The 'Priority' section shows Priority '1 : Default'. The 'History' table shows three steps: 'REQUESTED', 'APPROVED', and 'IN PROGRESS'.

Step Responded By	On	Workflow Step	Status	Step Status After	Comments
LESTACEY	2022-11-22 4:12 PM	Basic	REQUESTED	None	
SYSTEM	2022-11-22 4:12 PM	Basic	APPROVED	None	
SYSTEM	2022-11-22 4:13 PM	Basic	IN PROGRESS	None	

Similarly, search through your archived work requests by selecting the **Archived Requests** tab.

The screenshot shows the 'View Service Request' page in Archibus with the 'Archived Requests' tab selected. The 'Filter' section is visible, showing fields for Request Type, Status, Date Requested From, Date Requested To, Work Request Code, and Building Code. Below the filter, it says 'Select a Request to view more details' and 'No records to display.'

More questions? Email: [pltops.maintenance@uwaterloo.ca](mailto:pltops.maintenance@uwaterloo.ca)