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Campus Assist

User Guide:

Asset Surveys

Document Edition Control

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Document Control

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Contents

1. Purpose

The purpose of this document is to provide instruction on how to manage Asset Surveys in the Archibus systems employed by Central Operations Services (COS):

- Archibus Web Client (Campus Assist Online)
- Archibus Mobile App

Navigation – How to access the Web Client and the Mobile App, and how to identify the correct tools available to you.

Asset Survey – Understand the workflows involved in managing Asset Surveys

Roles – Know who is responsible for which activities at each stage of the Asset Survey 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 Asset Surveys.

There may be some exceptions to these standard activities, such activities would need to be established and agreed between the COS Asset Management Team and the relevant contractor.

2. General Information

2.1. Roles and Responsibilities

Objective An explanation of key system roles and whether they are filled by internal personnel (staff) or by external personnel (contractors).

Role	Staff/Contractor	Description
Asset Manager	Staff	Responsible for overseeing the entire Asset Survey process. Key activities include: • Defining the Asset Survey strategy for each contractor • Create Asset Surveys • Assign Asset Surveys to the required contractor
Contractor Supervisor	Contractor	Responsible for: • Assigning onsite craftsperson to Asset Surveys • Verify changes to asset data as made by onsite craftsperson • Return incomplete survey to the craftsperson
Contractor Craftsperson	Contractor	Using Mobile App, responsible for: • Reviewing each Equipment Item that is contained in the survey(s) assigned to them, updating the captured data as required • Adding new assets into the surveys as identified • Complete survey
Tech FM	Staff	Responsible for: • Reviewing Asset Surveys that have been completed and verified by the contractor • Return incomplete survey to the contractor • Copy asset data changes to the Archibus Equipment Table • Close out finished surveys

2.2. Terminology

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

Phrase	Description
Survey / Audit	Used interchangeably, however the terminology employed mostly in Archibus is Audit. An Audit is a collection of assets (Equipment Items) that are selected either by geographic location (within a building), by type of asset (Equipment Category), or by discipline such as Mechanical, Electrical, Hydraulic etc.
Equipment Item	Individual items, each relating to a specific known asset. Multiple Equipment Items grouped together form an Audit.
Work Team	A work team can be based on a specialized trade or on a site or building. Within the Asset Survey module, contractors are typically assigned to a Work Team that aligns to their company name. In assigning an audit to a Work Team, only personnel from the nominated company will have access to that Asset Survey.
Craftsperson	A craftsperson is an individual human who can be assigned to an Asset Survey. 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 Asset Surveys that haven't been issued to their respective Work Team.
Status	The status is a means of understanding where an Asset Survey currently resides in the workflow and the next actions that need to occur, and who is responsible for performing those actions.
Status – Issued to Auditor	When a new survey is created, the default or initial status of the survey is Issued to Auditor. Surveys must be in this status to be visible to the craftsperson via the mobile app.
Status – Audit on Hold	If the survey needs to be paused, or the Contract Supervisor doesn't want the craftsperson to see the survey in the mobile app, then the status of the survey can be changed to Audit on Hold.
Status – Completed	When each Equipment Item in the survey has been reviewed and updated, then the status of the survey can be changed to Survey Completed by the Craftsperson via the mobile app.

Status - Verified	After a survey has been completed, then the Contract Supervisor must review all of the changes made by the Craftsperson onsite. If all changes are verified at the Equipment Item level, then the survey status can be changed to Audit Verified.
Status – Closed	The Tech FM will review all verified Equipment Items in a survey. Approved changes are to be copied to the EQ Table in Archibus. After changes have been copied to the EQ Table, the survey status is to be changed to Audit Closed. The survey is locked at this point.
Complete (Equipment Item)	As a Craftsperson works through a survey, they will review each Equipment Item one by one. As they finish with each Equipment Item, they are to update that Equipment Item to Complete. Completed Equipment Items will display in orange text in the Mobile App so the Craftsperson can see what they have done and what remains to be done.
Verify (Equipment Item)	After a survey is changed to Audit Completed status, the Contract Supervisor will review the changes made to each Equipment Item one by one. If the changes are acceptable, then each Equipment Item will be Verified. If al Equipment Items in the survey are Verified, then the survey status can be changed to Audit Verified and will then be actioned by the Tech FM. If there are items that are not Verified, then the survey status is changed back to Issued to Auditor and the Craftsperson will have access to the survey once again. This time, they will only see the Equipment Items that were not Verified by the Contract Supervisor.
Copy to EQ Table (Equipment Item)	After a survey is changed to Audit Verified status, the Tech FM will review the changes made to each Equipment Item one by one. If the changes are acceptable, then each Equipment Item will be Copied to EQ Table. If all Equipment Items in the survey are Copied to EQ Table, then the survey status can be changed to Audit Closed and will be locked out to all users. If there are items that are not Copied to EQ Table, then the status is left as is, an out of system instruction is made by the Tech FM to the Contract Supervisor who will change the status of the survey to Issued to Auditor. The Craftsperson will have access to the survey once again. This time, they will only see the Equipment Items that were not Copied to the EQ Table by the Tech FM.
Asset & Equipment Survey	Module in the Archibus Mobile App used by Craftspersons onsite to review and update all included Equipment Items.
Survey Code	Identifier assigned to each survey created. It is set by the Asset Manager at the time the survey is created.
Equipment Code	Unique value assigned to each individual asset.
Equipment Standard	A categorisation of equipment used to group individual assets together with others that are of the same type.
Site Code	A code used to identify each campus.

Building Code	A code used to identify each individual building.
Building Name	Supports the Building Code field in identifying the building by name as opposed to an alphanumeric code.
Floor Code	Identifies the level or floor in the building.
Room Code	Identifies a particular space on a level, in a building.
Latitude	Using the Set GOS feature, will capture and record the latitudinal coordinate of the equipment.
Longitude	Using the Set GOS feature, will capture and record the longitudinal coordinate of the equipment.
School Code	Unique code used to identify the University school responsible for the area in which the equipment is located.
Department Code	Unique code used to identify which department within a school is responsible for the location in which the equipment is located.
Manufacturer	Identifies the manufacturer of the equipment item.
Model	Identifies the model of the equipment item.
Serial Number	Records the serial number of the equipment item.
In Service Date	Records the date in which the equipment was commissioned (if known).
Life Expectancy	The number of years that the equipment is expected to be able to run for.
Equipment Status	Used to record the status of the equipment. If the equipment item cannot be located, then the status should be changed to "Missing".
Equipment Condition	Record the condition of the asset as per guidelines provided by COS.
Criticality	Enter an assessment on how critical this equipment item is as per guidelines provided by COS.
Priority	Enter an assessment on how this equipment item should be prioritised as per guidelines provided by COS.
Description	A free text description of the Equipment Item.
Action	Enter an assessment on what action is recommended for this equipment item is as per guidelines provided by COS.
Cost to Replace	Dollar value to replace this equipment item.
Asset Survey Comments	Free text field used to capture comments by any role interacting with this Equipment Item in the survey. At a minimum, onsite

	Craftsperson should add comments to each equipment item they locate and update.
Date Last Surveyed	Captures the last date when this equipment item was surveyed.
Documents	Mechanism to use the camera feature of your mobile device to take and attach a photo to each Equipment Item. Note: It is mandatory for each equipment item to have 1 x photo attached before the survey can be Completed.
Barcode	A label affixed to most equipment items that can be scanned by the mobile device to locate an equipment item within a survey. Barcode will be the same as the individual Equipment Code for an asset.
Floor Plan - Sorting	A feature that allows the Craftsperson to view the Equipment Items in an Asset Survey grouped by floor, with a visual representation of which rooms on that floor contain Equipment Items relevant to the Asset Survey.
Floor Plan - Redline	The ability to mark-up a floor plan and save it against an individual Equipment Item.

3. Systems – Web Client

Objective   Understand standard system navigation features of the Archibus Web Client.

3.1. Web Client

Campus Assist is accessible from the Staff Intranet (**https://intranet.sydney.edu.au**). 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 **Shared Services** 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.
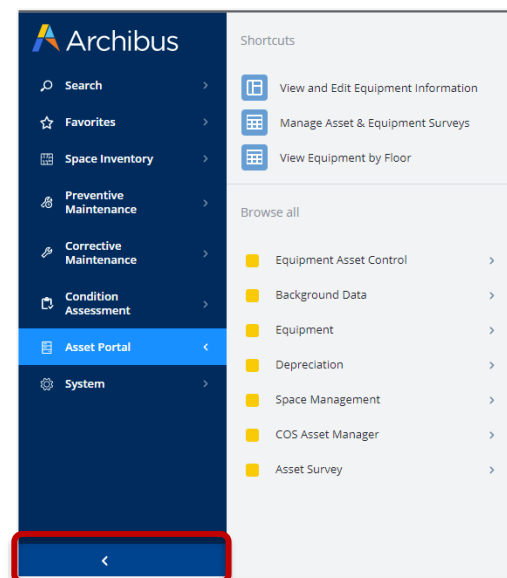
1. **Search**
The Search menu item allows for keyword search across the entire platform, spanning modules, reports, screens, and objects (data). The results and your access to them will be determined by your system role and permissions.

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 and can be populated 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.

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. Asset Portal

The Asset Portal facilitates the creation and management of University assets, including Asset Survey Requests. Different roles will see slightly different sub menus, but all will eventually drill down into the **Manage Assets & Equipment Surveys.**

Manage Assets & Equipment Surveys is where all system users, regardless of role, can manage individual Asset Surveys. The exception to this is the Craftsperson role which uses the Archibus Mobile App.
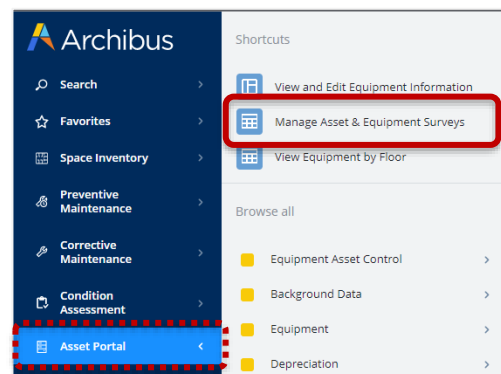
Tip! To save this item for quick access later, use the Favourites star at the top-right of the page to add it to your Favourites menu.

3.3. Manage Assets & Equipment Surveys

The **Manage Assets & Equipment Surveys** screen displays with 4 separate components:
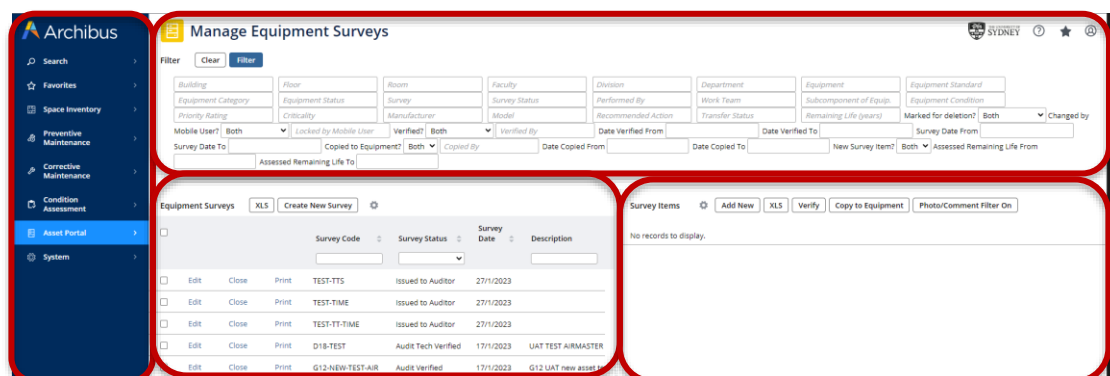
Navigation Pane – On the far left, the blue navigation menu allows you to move between different Archibus modules. This can be collapsed to maximise working area on your screen.
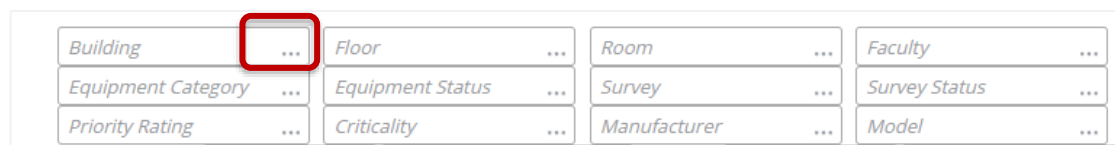
Filter Pane – Located across the top, the filter pane allows you to set restrictions on what surveys are displayed in the remaining working panes.

Equipment Surveys Pane – Located in the centre, this pane displays all of the surveys that have been created and that you have access to. For Asset Managers and Tech FMs, this pane also provides the functionality to create new surveys.

Survey Items Pane – located on the right of screen, this pane will display the individual Equipment Items that make up a survey. Select a survey in the Equipment Surveys Pane to see the corresponding items in this pane.
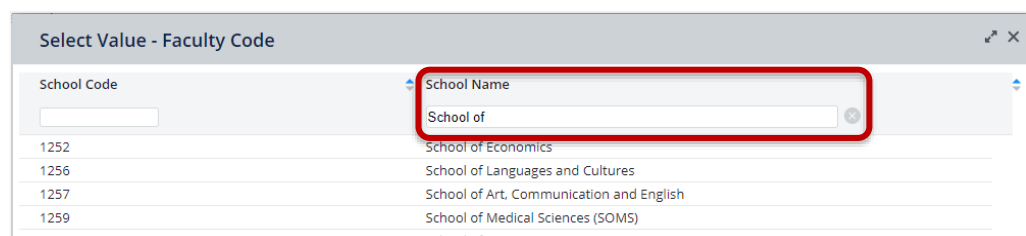
3.4. Look-up Fields

Many of the fields in Campus Assist validate information against a data base. If you are unsure of what to put into an empty field, select the **Ellipses** button that becomes visible when you hover in the far-right corner of an empty field. The exception to this rule is the Free Text fields where you are prompted to enter information of your choosing.

From the resulting pop-up frame, you can use the look-up fields to find the most suitable value to select and enter into the form, either by code or keyword:
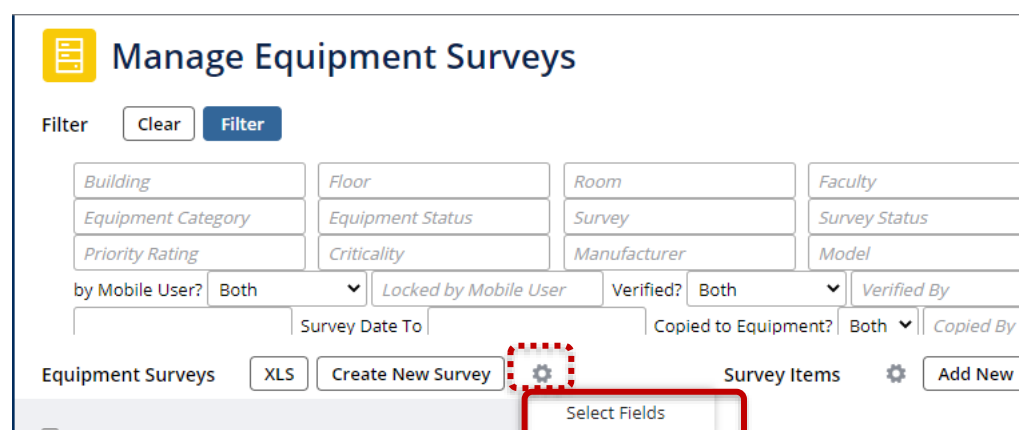
3.5. Additional Fields

There are many situations when you may want to view more information than what is currently displayed. There is a feature in both the **Equipment Survey Pane** and the **Survey Items Pane** that allows you to configure which fields are displayed, and in what order.

Select the **cog**, located top right of each pane, then Select Fields:

<u>**Equipment Survey Pane**</u>

Survey Items Pane

From the resulting pop-up frame, add fields from the left-hand column (available) into the right-hand column (Visible) and adjust the order. Select **Update** when done, or Cancel to close the window:

The respective pane will then refresh and display your chosen fields. These settings will be retained until you change them next.

4. Systems – Mobile App
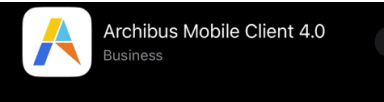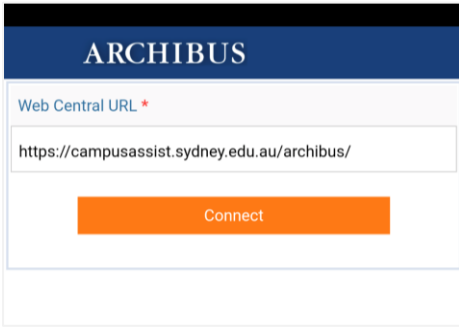
Objective	Download, Install and Configure the Mobile App for first use.

The Archibus Mobile App is an application that can be installed on smart phones and allows Craftspersons to update any Asset Surveys that are assigned to them.

The Mobile App provides limited functionality that includes:
- Updating existing Equipment Items included in an Asset Survey
- Adding new Equipment Items not included in an Asset Survey
- Completing an assigned Asset Survey

4.1. Download & Configure

Step	Image
1. From your device App store, search for the **Archibus Mobile App Version 4.0** app 2. Select Download / install Depending on your device, download from either the App Store or Google Play. Once installed the App will be accessible from the home screen of your mobile device.	Available on the App Store ANDROID APP ON Google play Archibus Mobile Client 4.0 Business
3. Launch the application from your smart phone. 4. Enter the Web Central URL: **https://campusassist.sydney.edu.au/archibus/** 5. Select **Connect.**	**ARCHIBUS** Web Central URL * https://campusassist.sydney.edu.au/archibus/ Connect
6. Enter your UniKey username & UniKey password. 7. Select **Register Device.**	

Note: Your UniKey account must have been activated and upgraded to include Mobile App access otherwise you will be unable to access the App. 8. Your device will register, and you'll be logged into the App. Next time you launch the app, these settings will be retained.	
9. Select the **cog wheel** from the top right of screen.	
10. Check the details displaying in the **User** section. To change users on a shared service, log out of the App here. **Note**: Do Not login to multiple devices with the same username. This will result in application errors when you attempt to do anything.	

11. Select the **Asset & Equipment Survey** module from the menu.	
12. On first use, the App will download background data. This may take up to 5 minutes to complete. Once completed, the App is ready for use.	

4.2. Enable Location Services

One of the features of the Mobile App is to capture GPS coordinates of Equipment Items as they are updated. To do this, location services must be enabled on the mobile device.

For assistance on enabling location services on iOS and Android devices, these external references provide instruction:

iOS: **https://support.apple.com/en-au/HT207092**

Android: **https://support.google.com/accounts/answer/6179507?hl=en**

5. Process Overview

5.1. Introduction

The process is designed so that Asset Surveys can be carried out by contractor onsite to identify the University's assets and to assess the status of those assets.

An accurate understanding of assets (quantity, location, condition etc.) is essential for the successful planning of strategic asset maintenance, repair and replacement.

Asset Surveys are created by the COS Asset Management Team, in conjunction with the contractors that the surveys will be assigned to. It is important that the surveys are created to align with the contractor's audit strategy so that onsite resources are appropriately utilised.

Once Asset Surveys are created and assigned to a contractor, it is at the contractor's discretion when the survey will be conducted within the agreed period.

This diagram demonstrates a high-level overview of the survey process:

5.2. Process Flow

Asset Manager	Contractor Supervisor	Contractor Craftsperson	Tech FM

Create New Survey
In Web Client
Survey Status = **Issued to Auditor**

Assign Survey to Craftsperson
In Web Client
Survey Status = **Issued to Auditor**

Work on Survey
In Mobile App
Survey Status = **Issued to Auditor**

Contractor Supervisor can toggle between these statuses and can override Craftsperson Activities

Hold Survey
In Web Client
Survey Status = **Audit on Hold**
(Removed from Craftsperson)

Complete Survey
In Web Client
Survey Status = **Audit Completed**
(Override Craftsperson Action)

Verify Survey
In Web Client
Survey Status = **Audit Verified**

Complete Survey
In Mobile App
Survey Status = **Audit Completed**

Return Asset Survey to the Craftsperson to resolve any data issues

Verify Equipment Item
In Web Client
Survey Status = **Audit Completed**

Verify Survey
In Web Client
Survey Status = **Audit Verified**

Return Asset Survey to the Contractor Supervisor to resolve any data issues

Copy to EQ Table
Web Client
Survey Status = **Audit Verified**

Close Survey
Web Client
Survey Status = **Audit Closed**

6. Step 1 – Audit Created (by Asset Manager or Tech FM)

Objective — Create a new Asset Survey and assign it to a contractor

Role — Asset Manager and/or Tech FM (Web Client)

Overview — Create a new Asset Survey that aligns with the contractor's audit strategy.
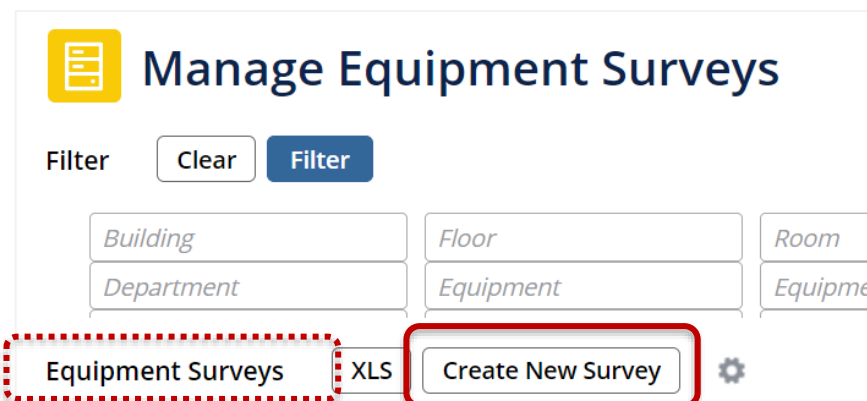
Next Step — Contract Supervisor will assign the Asset Survey to one of their onsite resources.

6.1. Create a new Asset Survey

Note: A suggestion to use the available filters to see what Asset Surveys may already have been created for your chosen location prior to creating any new Asset Surveys.

Step 1 – select **Create New Survey** from the **Equipment Surveys** pane in the Manage Equipment Surveys module:

Step 2 – Enter the mandatory fields including:
   Survey Code (adhering to naming convention of Building Code-Floor Code-Equipment Category)
   Survey Date (indicate when the survey should be completed by)
   Work Team Code (select the contractor)
   Description (higher character limit so more information can be entered here to provide additional information. E.g., ratings, date last survey, department and faculty, etc.)

Step 3 – Enter details into the non-mandatory fields. The information entered here has a direct bearing on what will be included in the survey.

Location – use the Building Code, Floor Code, Room Code to select the location to be surveyed.

Equipment – Use any of the available fields to select the equipment to be surveyed.

Note: You **must exclude** the Equipment Statuses of **Disposed** and **Duplicates**. These assets are **not** to be included in any Asset Surveys:

Step 4 – Create the Survey by selecting the **Create Survey** button:

Manage Equipment Surveys

Survey Information   Fields to Survey

[Create Survey] [Cancel]

Step 5 – Review survey contents, you will be notified how many equipment items are included in your survey and if any are also included in any other open surveys (select **Yes** to proceed with this survey, or no to cancel):

Note: The same Equipment Items should **not** be included on multiple surveys. If the survey contains records that already exist in another open survey, you should **not** continue. Refine your survey parameters to exclude any such Equipment Items.

Step 6 – Select Fields for inclusion in the survey. Here you can configure which fields will be included in the survey.
Note: Some fields are mandatory and cannot be changed. As a general rule, leave the default options as set.

Select the **Save** button to proceed:

Step 7 – Locate the survey that has just been created in the **Equipment Surveys** Pane. You may need to apply a restriction to the pane to more easily locate the survey. Check the **Check Box** located at the left of the action buttons:

Step 8 – Review the Equipment Items that make up the survey. These are located in the **Survey Items** pane. You will only see the Equipment Items in this pane if you have selected one or more surveys in the Equipment Surveys pane.

Here you will see each individual Equipment Item in the selected survey and the Action Buttons which are available to you.

Note: You don't want to proceed with any of these actions until after the Equipment Items have been:

1. Updated by the Contractor Craftsperson onsite, and
2. Verified by the Contractor Supervisor.

Completed – You have created a new survey which is now visible to the Contractor Supervisor who can commence with the next step in the workflow.

6.2. Survey Rules

There are several rules that should be adhered to when creating a new survey.

1. **Already a Survey** - check to see if there is already an open survey for the location and/or equipment category prior to creating a new survey.
   Use the available filters to achieve this (Building Code + Floor + Equipment Category + Status):

2. **Naming Convention** – naming of the survey is to include this information:
   Building that the survey will be assigned to
   Floor or Floors of that building that are included in the survey. To keep the volume of assets down, a building may be split into multiple surveys, 1 for each floor of that building.
   Equipment Category that aligns with the expertise of the contractor being assigned the Asset Survey.

3. **Maximum Number of Records** – This will be influenced by the Contractor's audit strategy. However, as a rule surveys should not exceed 1,000 individual equipment items as system performance will be affected when making changes to larger surveys.

4. **Multiple Surveys** - The same Equipment Items should **not** be included on multiple surveys. If the survey contains records that already exist in another open survey, you should **not** continue. Refine your survey parameters to exclude any such Equipment Items.

5. **Adding Fields to Survey** – Mostly the fields don't need to be changed from what is set as the default by the system. There are some fields that are mandatory and cannot be disabled. From the option fields there are a number that are already selected. Unless there are specific requirements, these should not be deselected as it will influence what displays in the Mobile App for the Craftsperson.
   Mark as Deleted is one field that is not selected and should **not** be enabled for the survey. It is important that this determination is not made by the contractor as it will remove the asset from the Equipment Table of not picked up by the Tech FM at later steps in the process.

6.3. Cautions

There are some limitations within the system that should be brought to your attention.

1. **Locations of Equipment Items** – All assets in Archibus have at least a Building Code and a Floor Code recorded against them. Some assets don't have a specific room code. One purpose of conducting these surveys is to record the actual location of every asset.

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7. Step 2 – Audit Assigned to Craftsperson (by Contract Supervisor)

Objective

Assign a new Asset Survey to a Craftsperson

Role

Contractor Supervisor (Web Client)

Overview
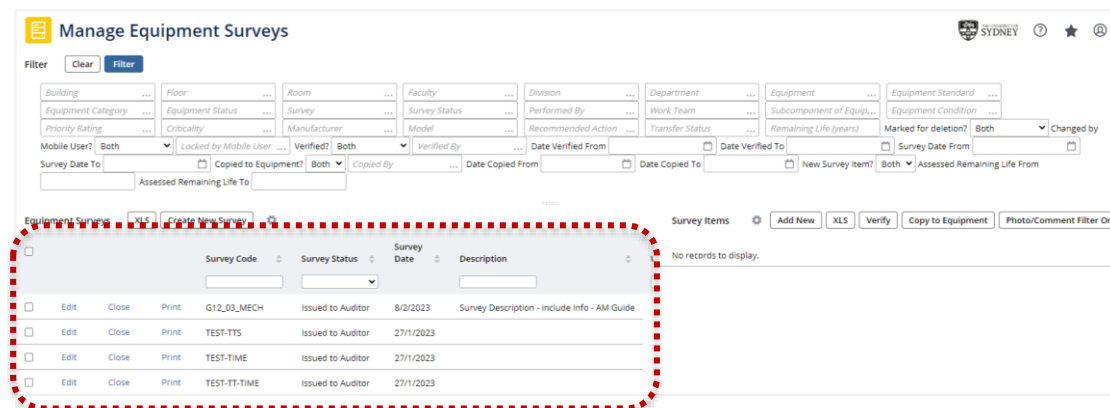
Using the Web Client, locate a newly created survey and assign it to an available resource so that the survey may be commenced.

Next Step

Contractor Craftsperson will commence working on the survey.
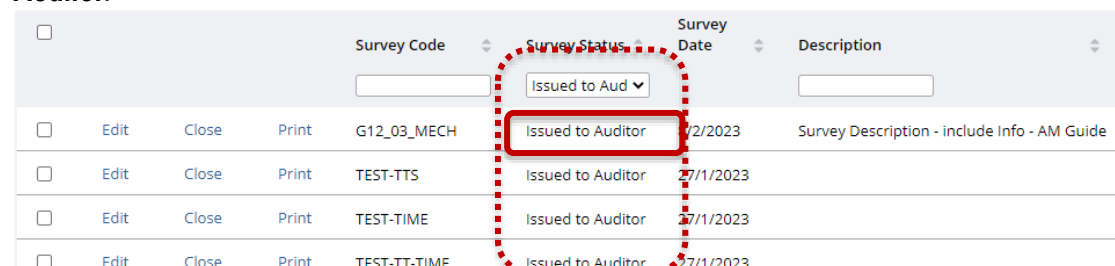
7.1. Assign a Survey to a Craftsperson

Step 1 – Identify any new surveys in the **Equipment Surveys** pane:

Step 2 – Set a restriction on the **Survey Status** field to only display surveys that are **Issued to Auditor**:

Step 3 – Identify any surveys that don't have a Craftsperson assigned in the **Performed By** field. You may need to scroll across the pane to see this column:

Note: If there is no Craftsperson in the Performed By field, then the survey hasn't been assigned to anybody yet.

Step 4 – Select the survey by checking the **Check Box**:

Step 5 – Review the **Equipment Items** that make up this survey. You can see the individual Equipment Items, as well as a count of the number of items contained in the survey. This survey has 5 Equipment Items.

Note: If there are any problems identified with this survey, then this should be raised with your COS Tech FM now, before assigning the survey to a Craftsperson.

Step 5 – Assign a Craftsperson to this survey by selecting the **Edit** button in the Equipment Surveys pane:

				Survey Code	Survey Status	Survey Date	Description
☐							
					Issued to Auc ▾		
☑	**Edit**	Close	Print	G12_03_MECH	Issued to Auditor	8/2/2023	Survey Description - include Info - AM
☐	Edit	Close	Print	TEST-TTS	Issued to Auditor	27/1/2023	
☐	Edit	Close	Print	TEST-TIME	Issued to Auditor	27/1/2023	
☐	Edit	Close	Print	TEST-TT-TIME	Issued to Auditor	27/1/2023	

Step 6 – Use the **Performed By** look up field to find and select your Craftsperson:

Edit Survey and its Status ⤢ ✕

Survey Information

Survey Code G12_03_MECH

Survey Date* 8/2/2023

Description Survey Description - include Info -

Performed By* [   ]

Work Team Code* XYZ MECHANICAL

Survey Status Issued to Auditor ▾

Step 7 – You will be provided with a list of the **Craftspersons** associated with your company, select the required Craftsperson from the list:

Select Value - Employee ⤢ ✕

Occupant Name	Authentication Email Address
XYZSUPERVISOR	xyzsupervisor@sydney.edu.au
STEPHEN ANTHONY LISICA	stephen.lisica@sydney.edu.au
OMER MOHAMAD	omer.mohamad@sydney.edu.au
MATTHEW VELLA	matthew.vella@sydney.edu.au
MATTHEW GRENFELL	matthew.grenfell@sydney.edu.au
MARTIN AYRES	martin.ayres@sydney.edu.au
KATRINA ERIN MILLINER	katrina.milliner@sydney.edu.au

Step 8 – Review the Survey Instructions. select **Save** to continue.
Note: It is possible to change the status of the survey here. However, any change in status to the survey will prevent the Craftsperson from having access to the survey on their mobile device. A Craftsperson will only see an Asset Survey in the Mobile App if the survey status is **Issued to Auditor.**

Step 9 – You can see that the survey is now assigned to a Craftsperson who can commence working on the survey:

Note: In order for the survey to be available to a Craftsperson, the following must be true:

Survey Status = **Issued to Auditor,** and

Performed By = set to a **valid craftsperson** from the available list

Survey Status	Survey Date	Description	Work Team Code	Performed By
Issued to Auc ▼				
Issued to Auditor	8/2/2023	Survey Description - include Info - AM Guide	XYZ MECHANICAL	XYZSUPERVISOR
Issued to Auditor	27/1/2023		ACES	
Issued to Auditor	27/1/2023		ACES	
Issued to Auditor	27/1/2023		ACES	

Completed – You have now assigned the survey to one of your company resources who can undertake the survey onsite.

7.2. Survey Rules

There are some rules that should be adhered to when assigning a new survey.

1. **Performed by** – At this stage, the only thing that needs to be done is to set a Craftsperson value into the Performed by Field

2. **Audit On Hold** – It is possible to change the status of a survey at this time. If you change the status to Audit On Hold, then the survey will not be downloaded to the Craftsperson's mobile device. If you change the status after the survey has already been downloaded to their device, then the survey will disappear from their mobile device next time it syncs.

3. **Audit Completed** – It is possible to change the status of a survey at this time. If you change the status to Audit Completed, then the survey will not be downloaded to the Craftsperson's mobile device. If you change the status after the survey has already been downloaded to their device, then the survey will disappear from their mobile device next time it syncs.
   Note: It is not typical for the Contractor Supervisor to change the Audit Status to Audit Completed. This activity would usually be performed by the Contractor Craftsperson onsite once they have reviewed all individual Equipment Items.

4. **Audit Verified** – It is possible to change the status of a survey at this time. If you change the status to Audit Verified, then the survey will not be downloaded to the Craftsperson's mobile device. If you change the status after the survey has already been downloaded to their device, then the survey will disappear from their mobile device next time it syncs.
   Note: Audit Verified is only used after the Audit has been completed and each Equipment Item has been individually Verified by the Contractor Supervisor.

7.3. Cautions

There are some limitations within the system that should be brought to your attention.

1. **Only 1 Craftsperson** – the system only allows for one Craftsperson to be assigned to a survey at any one time. If you change the Craftsperson in the Performed By field, then the original Craftsperson will no longer have access to the survey on their mobile device.

2. **Status –** Changing the status of the survey from anything other than Issued to Auditor will result in that survey not being visible to the Craftsperson through their mobile device.

8. Step 3 – Audit Completed (Onsite by Craftsperson)

Objective	Complete an assigned Asset Survey via the mobile app whilst onsite
Role	Contractor Craftsperson (Mobile App)
Overview	Using the Mobile App, review an Asset Survey that has been assigned to you. Physically locate each asset listed in the survey and update the record for that asset as required. Where assets are discovered onsite that are not captured in the survey, manually enter the details of these assets into the Asset Survey.
Next Step	Contractor Supervisor will verify the information provided by the onsite craftsperson.
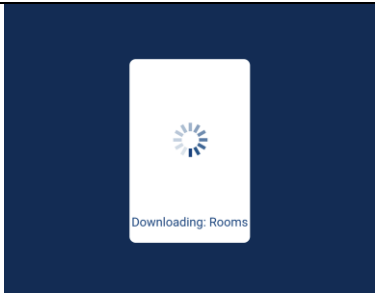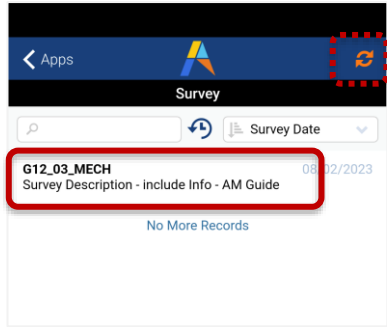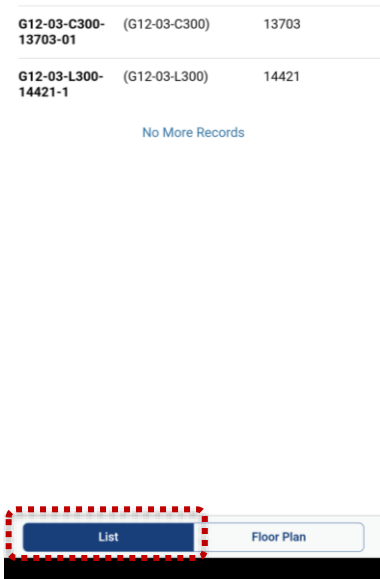
8.1. Locate an Asset Survey and Review Equipment Items – List Option

Follow these steps to locate and work on an Asset Survey in the Mobile App.

Note that the following steps assume that the Mobile App has already been downloaded, installed and configured for first use.

Step	Image
1. Launch the Archibus Mobile App. 2. Enter the **Asset & Equipment Survey** module.	
3. Wait for the app to download data.	

	Downloading: Rooms
4. Sync to ensure that all survey data is refreshed to your device. 5. Select the Survey you want to work on. Note that Survey Code and Description will tell you the equipment type (Mech) that the survey relates to and the location of the survey (C01G, Basement).	
There are 2 methods of reviewing Equipment Items. By List or by Floor Plan. **Note**: You are already in the List Option by default. **Section 8.2** of this document provides instruction on how to use the Floor Plan option. 6. You can choose to display the Equipment Items sorted by either the Equipment Code, or by Location.	

7. Identify the asset that you want to work on: Option 1 – Use the search field to enter an equipment code. If it is part of the survey, it will be displayed. Option 2 – Use the Barcode scanner to scan an existing barcode. If it is part of the survey, it will be displayed. Option 3 – Scroll through the listed survey items. **Note**: Some surveys may contain 100s or even 1000s of individual Equipment Items. Using the search option or the barcode scanner are quick ways of finding a specific asset in the survey. 8. Select the Equipment Item to begin working on it.	
9. Follow the instructions as provided in section **8.3 Update Equipment Items** of this document.	
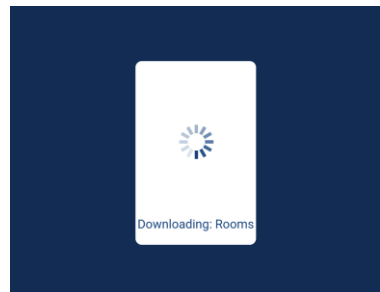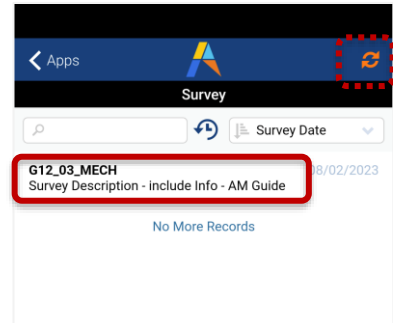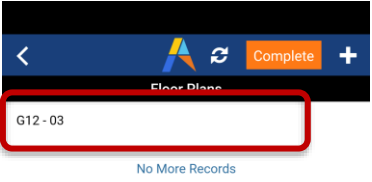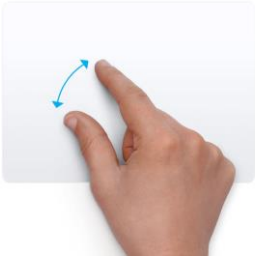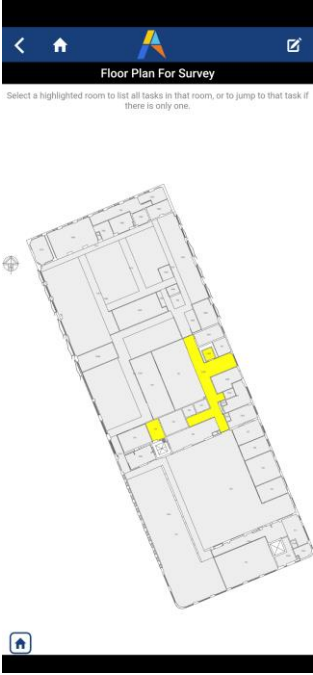
8.2. Locate an Asset Survey and Review Equipment Items – Floor Plans Option
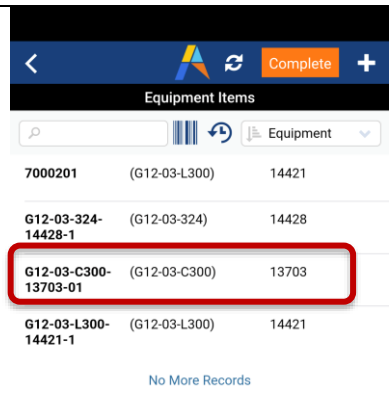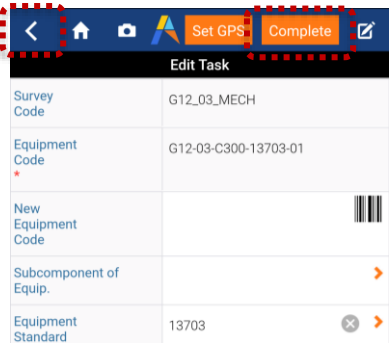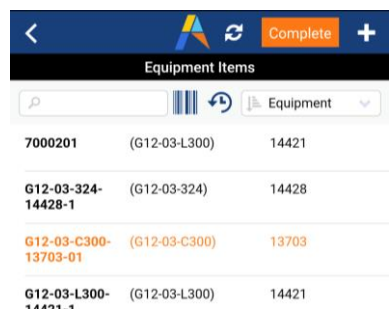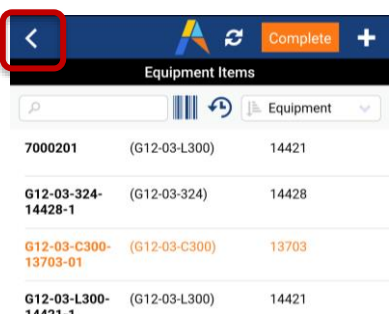
Follow these steps to locate and work on an Asset Survey in the Mobile App using the Floor Plans feature. This is a convenient way of using the available floor plans to identify which spaces have Equipment Items recorded in them. You will see from the following steps that this method provides clear visual representations of what spaces have been audited, and which have not.

Note: That if an Equipment Item doesn't have Floor and/or Room data recorded, then it won't be accessible via the floor plan. For any such assets you will need to use the method documented in section **8.1 Locate a Survey and Review Equipment Items – List Option** of this document.

Step	Image
1. Launch the Archibus Mobile App. 2. Enter the **Asset & Equipment Survey** module.	
3. Wait for the app to download data.	
4. Sync to ensure that all survey data is refreshed to your device. 5. Select the Survey you want to work on. **Note**: that Survey Code and Description will tell you the equipment type (Mech) that the survey relates to and the location of the survey (C01G, Basement).	

6. Select the **Floor Plans** option located at the bottom of screen.	
7. Select the Level that you want to work on. The system will display all available floor plans for the Equipment Items included in the Asset Survey.	
The selected floor plan will be displayed. 8. Use your fingers in a reverse pinching action to zoom in on the floor plan **Yellow Spaces** – Contain Equipment Items from the Asset Survey. **Grey Spaces** – Do not contain Equipment Items from the Asset Survey. **Orange Spaces** – All Equipment Items from this Asset Survey in that space have been Completed. 9. Select the Yellow Space that you intend to work in.	
All of the Equipment Items that are recorded against that location in the Asset Survey will be displayed here. 10. Select the Equipment Item that you want to work on.	

Review the existing asset information for this Equipment Item and make changes as per the instruction in section **8.3 Update Equipment Items** in this document. 11. Select the **Complete** button when you have finished updating this Equipment Item. 12. Select the **Navigation Back** button to continue.	
You will notice that the Equipment Item that you had just completed has changed colour to Orange. 13. Continue working through the review of all remaining Equipment Items recorded in this space.	
When all the Equipment Items for that space have been completed, all will display as Orange. 14. Select the **Navigation Back** button to continue.	
You will notice that the colour coding for that space has been updated. Because all recorded Equipment Items for that space have been Completed, then the space colour has changed to Orange. This method provides you with visual guides to determine what spaces you have already worked in.	
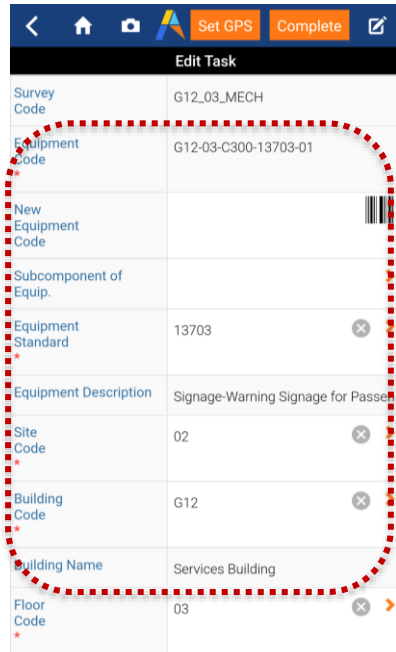
	Floor Plan For Survey
Note: It is possible that there are Equipment Items contained in the Asset Survey that are not mapped to a room. As such you will not be able to find these Equipment Items via this Floor Plans feature. You will need to use the List Option to find these Equipment Items in the Asset Survey (Section **8.1** of this document).	
Note: If you identify an Equipment Item located in a Grey Space, then it is likely that Equipment is not recorded in the Asset Survey. To check, you can follow the steps in section **8.1** of this document to search for Equipment Items via the List Option. If the Equipment Item is not contained in the Asset Survey, then you can add it by following the steps identified in Section **8.4 Add New Equipment Items** in this document.	
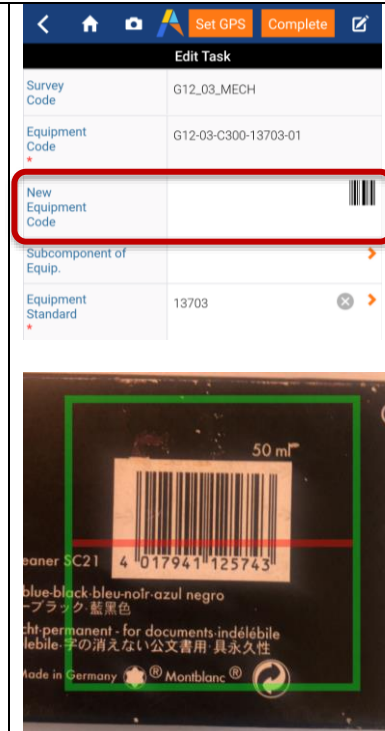
8.3. Update Equipment Items

Follow these steps to update individual Equipment Items that are contained within an Asset Survey.

Note: It is not important whether you are using the List Option or the Floor Plans Option to navigate within the Asset Survey. It is the same process to update Equipment Items.

Step	Image
1. Launch the Archibus Mobile App. 2. Enter the **Asset & Equipment Survey** module.	
3. Follow the steps outlined in section 8.1 or 8.2 to select an Equipment Item that needs updating. 4. Review the information in each field and update as required. **Note:** There are a total of 25 fields that you can update for each Equipment Item. Be sure to scroll down so as not to miss any. **Note:** Section **2.2 Terminology** of this document contains a definition for each field contained in the survey. **Note:** Please refer to the **Asset Management Master Asset Data Capture Form** for definitions and further guidance on how to correctly assess assets and what fields are most important to update. **Note:** Mandatory fields will be marked with a red asterisk (*).	
5. If a new Barcode is required, affix the new barcode label to the asset. Then use the barcode reader to record the new barcode in the New Equipment Code field.	

Note: If the barcode reader won't work, you can manually enter the new asset code into this same field.	
6. Select the Camera button to take and attach a supporting Photograph to each Equipment Item. **Note:** The Document button at the bottom of screen shows how many photos have been attached to the Equipment Item (red circle with a number inside). **Note:** It is possible to attach **up to 4 different photographs** to each Equipment Item. **Note:** It is not possible to complete an Equipment Item without attaching at least one photograph. **Note:** It is not possible to complete the entire Asset Survey unless each Equipment Item **has at least one photograph attached.**	
7. Add comments to the Equipment Item, especially if you have changed any of the data fields.	
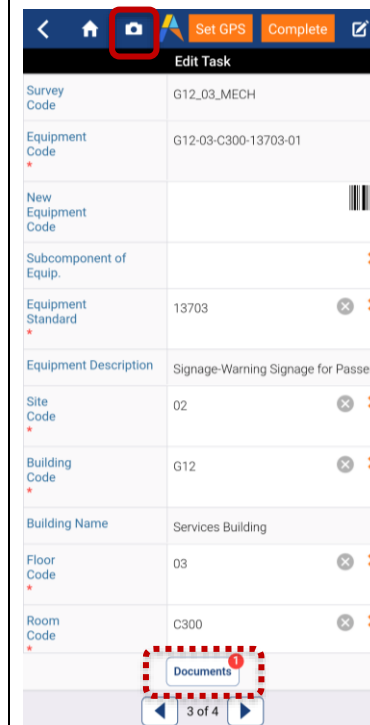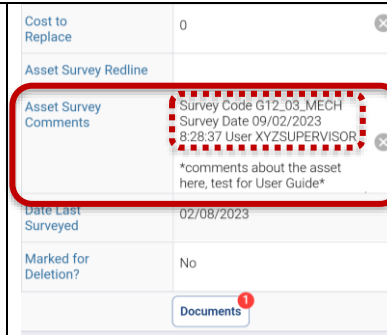
This is a free text field. Use the keyboard function of your device to input information into this field as required. **Note:** System information for quality and audit purposes will appear automatically, including the username of the commenter and timestamp. Please **do not remove** these from the comment field.	
8. Select **Set GPS** at the top of screen to record the latitude and longitude coordinates of the asset. **Note:** You must **enable Location Services** on your device for this function to work. Refer to the **Enable Location Services** section of this document. **Note:** Only do this when you are physically close to the asset.	
9. Select **Complete** at the top of screen to acknowledge that no further changes are required for this Equipment Item. **Note:** If you try to navigate away from this Equipment Item using the Forward or back arrows at the bottom of screen, you must have attached a photograph to proceed. **Note:** If you navigate away from this Equipment Item by using the navigation buttons at top of screen, you won't be prompted to attach a photograph. However, you will have to return at a later time to attach a photo prior to completing the Asset Survey. **Note:** If you have finished updating this Equipment Item, then **Complete it before navigating away**. Completing the Equipment Item will cause it to display as orange in the Asset Survey. This indicates which Equipment Items are done, and which are still outstanding.	
After the Complete function has finished, you can do one of 2 things: Either Navigate to the next or previous Equipment Item by using the Navigation Buttons at the bottom of screen. Or;	
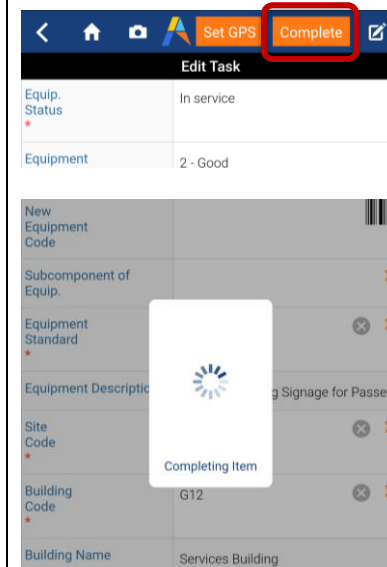
Return to the Equipment Items list by selecting the **Back-Navigation** button at the top of screen.	
As each Equipment Item is individually Completed, they will display as orange in the Asset Survey. **Note:** It is not mandatory for you to change each Equipment Item to Completed, resulting in the orange highlight, but it does make it easier to keep track of what has been done and what is still outstanding.	
10. Repeat this process for every Equipment Item in the Asset Survey. **Note:** All Equipment Items will display as Orange once they have been Completed. This provides a clear visual cue so that you can easily identify any outstanding Equipment Items that still need to be surveyed.	
Note: If you attempt to Complete the Asset Survey without updating each individual Equipment Item, you will not be able to. You will receive an error stating that at least 1 photo must be attached to each Equipment Item prior to saving. **Note:** The minimum requirement to change the status of an Asset Survey is that every single Equipment Item must have at least 1 photo attached.	

Once complete, you will receive a pop-up to confirm you wish to complete this survey.
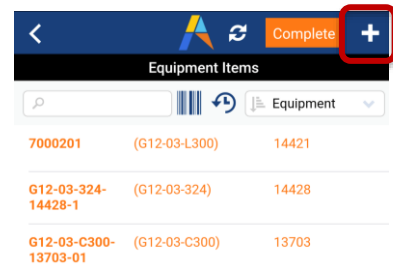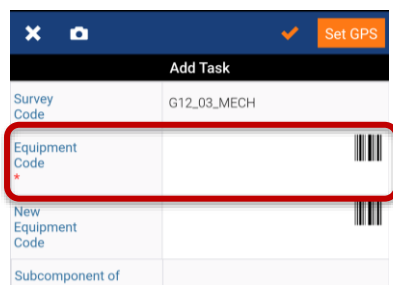
11. Select **Yes** to proceed, or **No** to return and continue to **update equipment items**, or **add new equipment items**.

Note: Ensure you only complete the Asset Survey once all assets in the space have been reviewed and have confirmed there are no additions required.
If your Survey is incorrect or missing information, it may be returned at the verification stage.
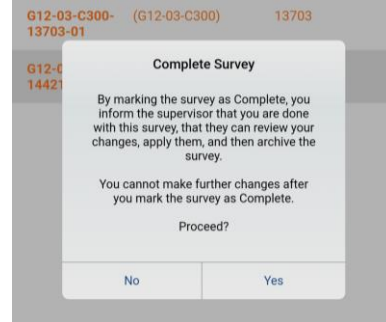
8.4. Add New Equipment Items
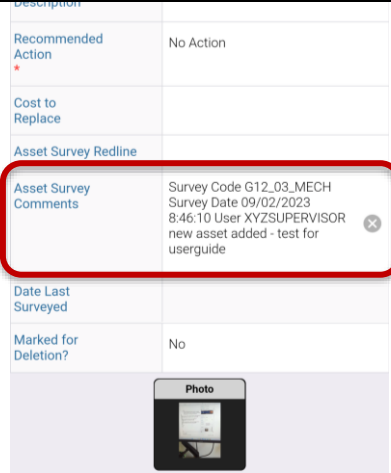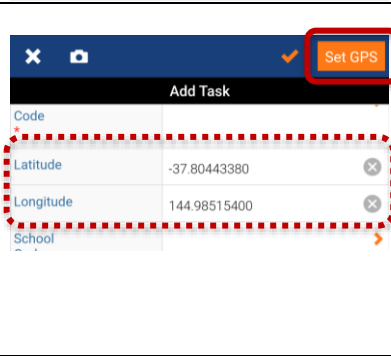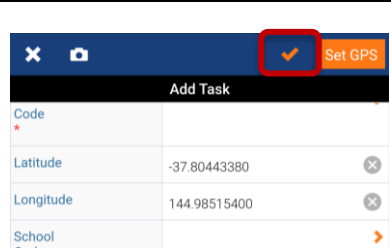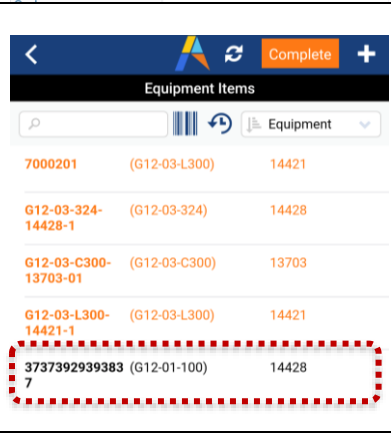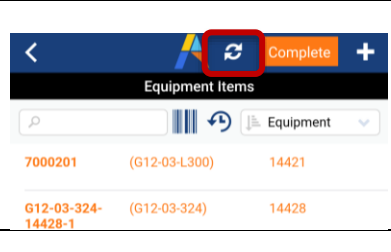
Follow these steps to add an Equipment Item into an Asset Survey for an asset found onsite that wasn't originally in the survey.

Step	Image
1. Launch the Archibus Mobile App. 2. Enter the **Asset & Equipment Survey** module.	
3. Follow the steps outlined in **section 8.1** or **section 8.2** to select an appropriate survey and to search for your Equipment Item.	
4. To add a new Equipment Item into the Asset Survey, select the **+** symbol at the top right of screen. **Note**: Ensure that you have searched the survey for the Equipment Item before adding a new Equipment Item. It is not acceptable to have duplicate assets entered into the Archibus system. **Note**: Ensure that you are working within the correct Asset Survey before adding new Equipment Items.	
5. Use the barcode scanner to record the barcode located on the asset.	

6. Manually enter all data fields for this new Equipment Item. **Note**: There are a total of 25 fields that you can update for each Equipment Item. Be sure to scroll down so as not to miss out on any. **Note**: Section **2.2 Terminology** of this document contains a definition for each field contained in the survey. **Note**: Please refer to the **Asset Management Master Asset Data Capture Form** for definitions and further guidance on how to correctly assess assets and what fields are most important to update.	
7. Attach photographs of the asset by using the Camera button to take and attach a supporting Photograph to each Equipment Item. **Note**: A preview of the attached photo at the bottom of screen confirms that a photo has been attached. **Note**: It is possible to attach up to 4 different photographs to each Equipment Item. **Note**: It is **not** possible to add a new Equipment Item without attaching at least one photograph.	

8. Use the comments section to add any further information about this asset.	
9. Select **Set GPS** at the top of screen to record the latitude and longitude coordinates of the asset. **Note**: You must **enable Location Services** on your device for this function to work. **Note**: Only do this when you are physically close to the asset.	
10. Select Tick button to save this information and to create a new Equipment Item in the Asset Survey.	
11. Navigate back to the Survey, you will see that the new Equipment Item has been created and added to the survey. **Note**: You may need to search for the new Equipment Item depending on how many assets are already in the Asset Survey.	
12. Synchronise the app to ensure that data is refreshed to the server.	

13. Repeat this process as you discover any assets that are not captured in the Asset Survey or complete the survey if there are no other items to add.	
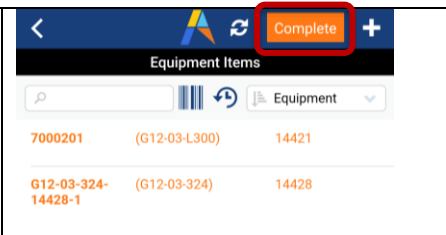
8.5. Returned Surveys

Where either a Contractor Supervisor or COS Tech FM has determined that one or more Equipment Items in a survey require more information, then they may return the survey to you to be redone.
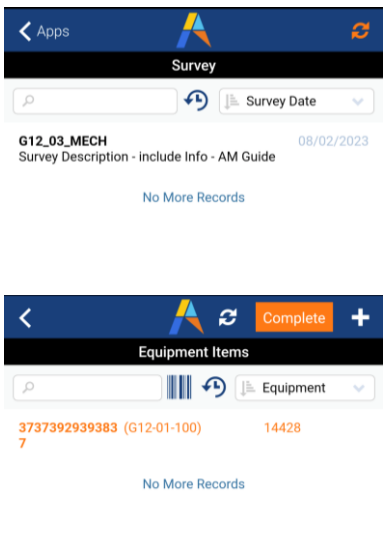
Note: In this situation you will only see the individual Equipment Items that need to be redone, all of the Equipment Items that you had previously updated and have been accepted will not be visible to you. This is to avoid a situation where you redo the survey on items unnecessarily.

To determine why you are required to redo the survey of these Equipment Items, check the Equipment Comments field for each Equipment Item for comments from either the Contractor Supervisor and/or the COS Tech FM. Make changes to the Equipment Item as per the instructions provided in section **8.3 Update Equipment Items** of this document.
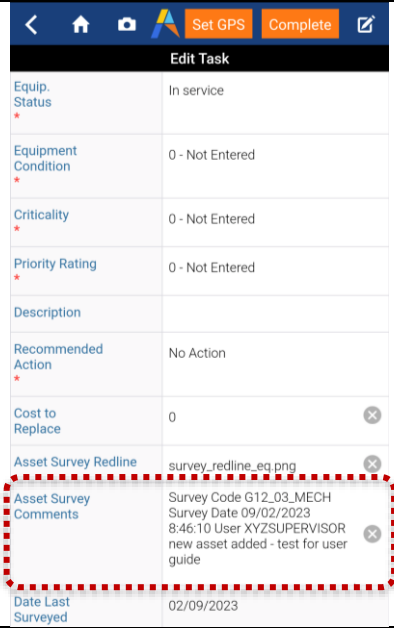
A returned Asset Survey looks like this in the Web Client:
Note: There are some items which have been verified and only 4 items that have been Un-Verified.

Step	Image
In the Mobile App, the returned Asset Survey will display, listing each of the returned items. **Note** there is only 1 Equipment Items included in this returned survey out of the original four items.	
Each Equipment Item includes comments explaining why it needs to be re-done:	

Follow steps in section **8.3 Update Equipment Items** to revise and complete the returned survey item. Repeat this step for all items that have been returned.	
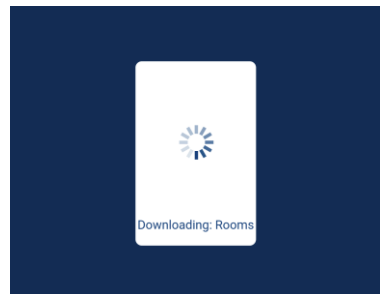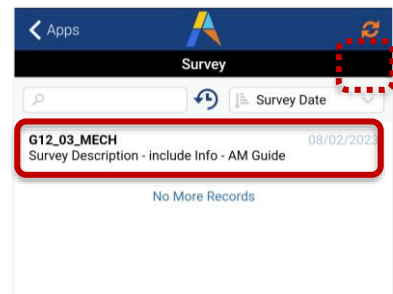
8.6. Redlines

Follow these steps to mark-up floor plans and save those mark ups against a specific Equipment Item.
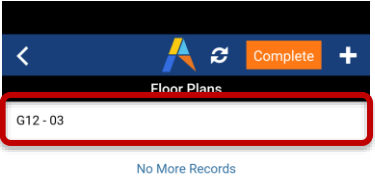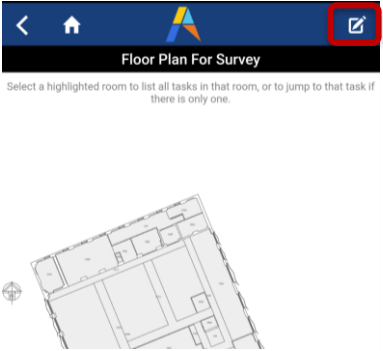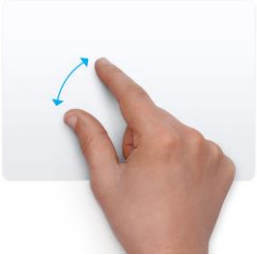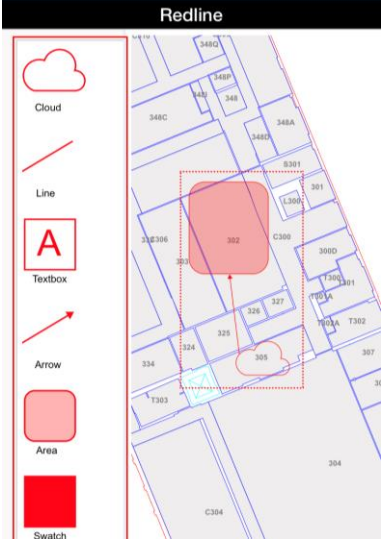
This is a useful feature that can be used to illustrate the position of an asset in a physical space.

In this process you will access a standard floor plan from within the Asset Survey. Marking Up this floor plan will result in a copy of the floor plan being attached to the Equipment Item of your choosing.

Note: Before starting the Mark Up process, take note of the Equipment Code so that you can save the marked-up floor plan against the correct Equipment Item.

Step	Image
1. Launch the Archibus Mobile App. 2. Enter the **Asset & Equipment Survey** module.	
3. Wait for the app to download data.	
4. Sync to ensure that all survey data is refreshed to your device. 5. Select the Survey you want to work on. **Note**: that Survey Code and Description will tell you the equipment type (Mech) that the survey relates to and the location of the survey (C01G, Basement).	

6. Select the **Floor Plans** option located at the bottom of screen.	List / Floor Plan
7. Select the Level for the floor plan you want to see.	Floor Plans G12 - 03 No More Records
8. Select the **Mark Up** icon in the top right of screen	Floor Plan For Survey Select a highlighted room to list all tasks in that room, or to jump to that task if there is only one.
9. Drag and drop the **Mark Up Tools** onto the floor plan and resize as required. **Note:** Zoom in on the floor plan to make positioning and resizing of the mark-up symbols easier. 	Redline Cloud / Line / Textbox / Arrow / Area / Swatch

Scroll to the bottom on the Mark Up pane on the left of screen. 10. Select **Save Image** to keep the changes that you have made.	
You must save the changes to the floor plan against a specific Equipment Item It is not possible to override the actual floor plan, you are making a copy that includes your mark ups. 11. Select the **Equipment Item** from the list in the Asset Survey.	
12. Use the **Back Navigation Button** to exit the floor plan view.	
You can check that the marked-up floor plan has been saved.	
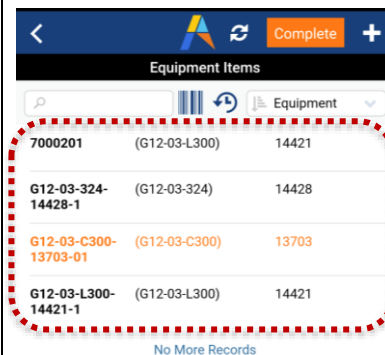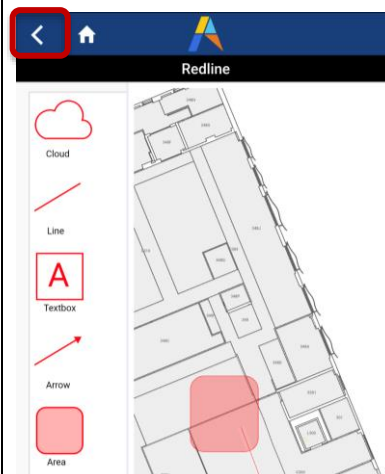
13. Select the **Equipment Item** from the **List View** in the Asset Survey.	
14. At the bottom of screen, select the **Documents** button.	
An image of your mark ups on the floor plan will have been saved into this Equipment Item. **Note:** Any attached photographs will also display here.	
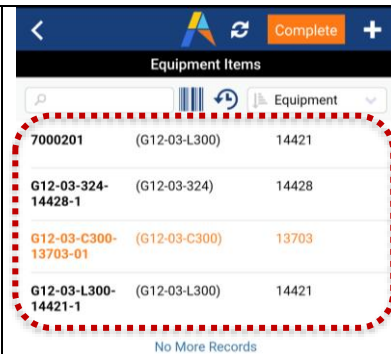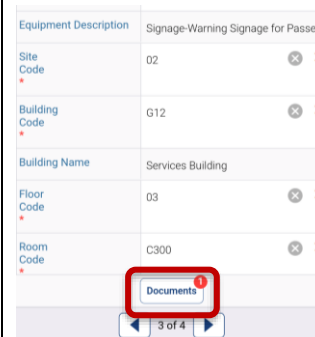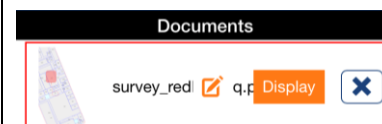
8.7. Duplicate Assets

There will be situations where duplicate assets are found on site. This section provides guidance on what to do when this occurs.

Example:

You enter a space looking at equipment and you find one equipment, but the survey shows 2 equipment items with identical information except for the equipment code.

- One survey item has a bar code in the equipment code (e.g., e.g. 2030122), this is the **master record.**
- The other survey item has the spatial data in the equipment code (e.g., D17-B4-B3015P-11361-01), this is the **duplicate record.**

This is what you should do for the **Master Equipment Item:**

- **Comments** to the master record noting that a duplicate record exists.
- Attach a photo of the Equipment Item

This is what you should do with the **Duplicate Equipment Item** with:

- **Comments** including the bar code of the Master Record survey.
- Update the equipment status to **Duplicate.**
- Attach a photo of the Master Equipment Item

Synchronise the App to record these changes.

9. Step 4 – Audit Verified (by Contract Supervisor)

Objective	Verify the updates made by the onsite Craftsperson
Role	Contractor Supervisor (Web Client)
Overview	Using the Web Client, the Contractor Supervisor will review and verify all updates made by the onsite Craftsperson. Verification occurs individually at the Equipment Item level, and then collectively at the Asset Survey level.
Next Step	Tech FM will review changes. If accepted, they will be copied to the EQ Table and the Asset Survey closed. Or; If Equipment Items are not all verified, the Asset Survey can be returned to the onsite Craftsperson to redo those Equipment Items.

9.1. Identify changes made by the onsite Craftsperson

This action occurs after the onsite Craftsperson has updated each individual Equipment Item and subsequently changed the status of the Asset Survey to Completed status.

Step 1 – Use the available Filters to locate the completed Asset Survey:

				Survey Code	Survey Status	Survey Date	Description
☑	Edit	Close	Print	G12_03_MECH	Audit Completed	8/2/2023	Survey Description - include Info - AM Guide
☐	Edit	Close	Print	TEST-TTS	Issued to Auditor	27/1/2023	
☐	Edit	Close	Print	TEST-TIME	Issued to Auditor	27/1/2023	

Step 2 – Select the survey in the Equipment Surveys pane. Putting a tick in the check box for this survey will display all the Equipment Items in the Survey Items pane.
Note: Ensure that only the 1 survey is selected otherwise you will see Equipment Items for multiple surveys.

Step 3 – Identify which Equipment Items have been updated by the onsite Craftsperson. Do this by adding in the following fields into your current view:

- **Changed by Mobile User** (indicates that at least 1 field has been changed by the Craftsperson.
- **Survey Photo** (survey cannot be completed by Craftsperson unless every Equipment Item has 1 phot attached)

These fields will allow you to confirm that each Equipment Item has been reviewed and updated by the onsite Craftsperson.

Note: If the status of the survey has been changed to Completed by the Craftsperson, it would be fair to assume that each individual Equipment Item has been reviewed by that Craftsperson.

Step 4 – Select **Edit** for the Equipment Item
Note: this pop-up displays 2 panes side by side so that you can compare the original data for the Equipment Item and the new data for the Equipment Item.

Step 5 – Review the changes made by the Craftsperson.
Note: Where there have been changes to any of the equipment fields, these will be highlighted in red for ease of comparison.

Step 6 - You can override any changes yourself. Select **Save** to record any changes that you have made before closing this window.

Next is the verification of changes made to an Equipment Item. The different ways this can be achieved is covered in section **9.2 Verification of Equipment Items.**

9.2. Verification of Equipment Items

After the changes made by the onsite Craftsperson have been reviewed, then a decision needs to be made as to whether or not each individual Equipment Item is to be Verified.

Verification can be done individually or in bulk.

To determine which Equipment Items have already been verified, add these fields to your current view:
- **Verified** – indicates whether an Equipment Item has been verified or not (yes/no field)
- **Verified By** – shows who verified the Equipment Item
- **Verify Date** – the date that the Equipment Item was verified

Individual Verification – Method 1
Step 1 – Select **Edit** on an Equipment Item in the Survey Items field.

Step 2 – Select the **Verify** button at the bottom of the pop-up window.
Note: The advantage of this method is that you can review any changes made in the Edit pane before deciding to Verify those changes.

Step 3 – You can see that the Equipment Item has been verified as the Verify button is now disabled. Also, the Verify fields have been populated:

Individual Verification – Method 2
Step 1 – Select the **Verify** button for an individual Equipment Item
Note: There is no option to review changes with this method. It is expected that you had previously satisfied yourself of the accuracy of the information contained in the Equipment Details prior to Verifying.

Step 2 – You can see that the Equipment Item has been verified as the Verify button is now disabled. Also, the Verify fields have been populated:

Bulk Verification

Step 1 – Select one or more Equipment Items by putting ticks into the **Check Boxes** at the left of the Survey Items pane.

Step 2 – Select the **Verify** button located in the header bar of the Survey Items pane. This will perform the Verification action for all selected Equipment Items.

Note: If there are multiple pages of Survey Items, the bulk verification will only apply to the selected Equipment Items on the current page.

Step 3 – **Confirm** the action when prompted:

Note: There is no option to review changes with this method. It is expected that you had previously satisfied yourself of the accuracy of the information contained in the Equipment Details prior to Verifying.

Confirm ✕

❓ This action will verify the selected survey items. Proceed?

[Yes] [No]

Step 4 – You can see that the Equipment Item has been verified as the Verify button is now disabled. Also, the Verify fields have been populated:

			Verified? ⇕		Survey Code ⇕	Equipment Code ⇕	New Equipment Code ⇕
☐	Edit	Verify	Un-Verify	Yes	Copy To Equipment	G12_03_MECH	37373929393837	
☐	Edit	Verify	Un-Verify	Yes	Copy To Equipment	G12_03_MECH	7000201	
☐	Edit	Verify	Un-Verify	Yes	Copy To Equipment	G12_03_MECH	G12-03-324-14428-1	
☐	Edit	Verify	Un-Verify	Yes	Copy To Equipment	G12_03_MECH	G12-03-C300-13703-01	

Note: You have the option to Un-Verify any items that have been previously verified up to the point where the survey status is changed to Audit Verified. This action is covered in section **9.3 Un-Verified Equipment** Items of this document.

9.3. Un-Verified Equipment Items

Where Equipment Items are not able to be verified, there is an option to Un-Verify these Equipment Items.

The intention is that Equipment Items that are Un-Verified are to be returned to the onsite Craftsperson to re-do.

Where an Asset Survey has Un-Verified items and the survey status is changed from Audit Completed back to Issued to Auditor, then the onsite Craftsperson will only see the Equipment Items that are not Un-Verified. To avoid confusion, they will not see any Verified Equipment Items.

To Un-Verify an Equipment Item, follow these steps:

Step 1 – S elect **Edit** on the Un-Verified Equipment Item in the Survey Items field.

Step 2 – Add a **Comment** into the Asset Survey Comments field.
Note: it is important that you communicate to the Craftsperson why this Equipment Item needs to be redone.

Step 3 – Select **Save** to record the changes and close this pop-up window.

Note: Any Verified Equipment Items will automatically become Un-Verified **after you make changes and select save.** Ensure you are adding any general changes or commentary to the items **before verifying** if you do not intend to un-verify the item.

Step 4 – You can see that the Equipment Item has been Un-Verified as the Un-Verify button is now disabled and the Verify fields have been reset.

Note: It is also possible to Un-Verify a previously Verified Equipment Item, provided that the survey status has not been changed from Audit Completed.

			Verified?			Survey Code	Equipment Code	New Equipment Code
☐	Edit	Verify	Un-Verify	No	Copy To Equipment	G12_03_MECH	37373929393837	
☐	Edit	Verify	Un-Verify	Yes	Copy To Equipment	G12_03_MECH	7000201	

Equipment Code: 3¹ 7¹ G³ All⁵

9.4. Verification of Asset Survey

The Asset Survey status should not be changed to Verified until after all Equipment Items have been individually verified.

To determine which Equipment Items have already been verified, add these fields to your current view:

- **Verified** – indicates whether an Equipment Item has been verified or not (yes/no field)
- **Verified By** – shows who verified the Equipment Item
- **Verify Date** – the date that the Equipment Item was verified

Step 1 – Select **Edit** on the Asset Survey in the Equipment Surveys pane.

Step 2 – Change the status of the Asset Survey to **Audit Verified.**

Note: If there are Equipment Items that have been Un-Verified, then you should change the status of the survey to **Issued to Auditor**, this will return the survey to the onsite Craftsperson so they can re-do those un-verified Equipment Items.

Step 3 – Select the **Save** button to affect the status change.

The survey will now be reviewed by the **COS Tech FM.** If they accept all of your verified changes then the new data will be copied across to the **Archibus EQ Table.** This will update the asset information in the database.

9.5. Return Asset Survey to Craftsperson

Where you have reviewed individual Equipment Items and decided that they require more work, as per the steps identified in section **9.3 Un-Verified Equipment Items** of this document. You are able to return the Asset Survey to the Onsite Craftsperson so that those Equipment Items may be updated prior to moving the Asset Survey on to the Tech FM for their review and further action.

Step 1 – Use the available Filters to locate the completed survey.
Note: The Asset Survey will still be in the Audit Completed status.

Step 2 – Select **Edit** in the Equipment Survey pane.

Step 3 – Change the Asset Survey status to **Issued to Auditor**:
Note: This change in status ensures that the Asset Survey will be visible to the Craftsperson in the Mobile App.

Step 4 – (If Required) Update the **Performed By** to reflect the actual **Craftsperson** who is to do the work.

Note: If no change is made to this field, it will retain the Craftsperson assigned to the Asset Survey originally.

Step 5 – Select **Save** to effect these changes.
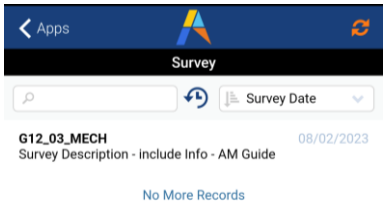
Note: The onsite Craftsperson will only see the individual Equipment Items that have been Un-Verified. They will not see any of the Equipment Items that were previously verified.
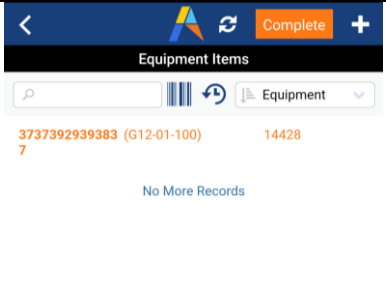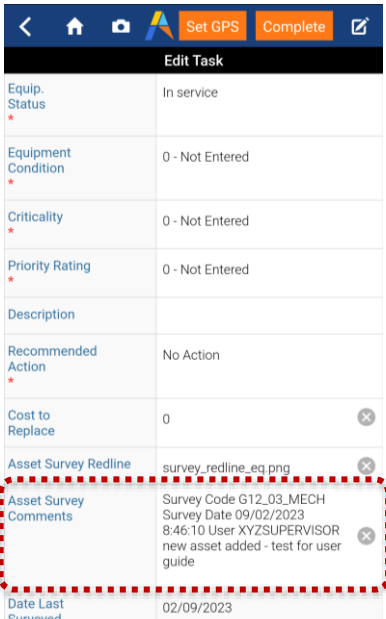
A returned Asset Survey looks like this in the Web Client:
Note: There are some items which have been verified and only 1 item that has been Un-Verified.

Step	Image
In the Mobile App, this same Asset Survey will display like this: Note that there is only 1 Equipment Item included:	

Each Equipment Item includes comments explaining why it needs to be re-done:	

9.6. Survey Returned from Tech FM

There will be occasions where the Asset Survey that you as the Contractor Supervisor have Verified, will be returned for further action by the COS Tech FM.

After you change the status of an Asset Survey to Audit Verified, the Asset Survey is reviewed by a COS Tech FM who can determine the following actions for each individual Equipment Item:

Copy to EQ Table – This is where the changes as made by the onsite Craftsperson and reviewed by the Contractor Supervisor are accepted and updated into the Archibus database – thereby overwriting any previous information. Or,

Un-Verify – Which is where the Tech FM wants you to take another look and fix up any missing or inaccurate information.

Where there are any Equipment Items that are Un-Verified by the Tech FM, they will revert the status of the asset survey to the **Issued to Auditor** status. The Contractor Supervisor will then need to re-assign the Asset Survey to an onsite Craftsperson who will revisit and redo.

Note: There will be a note in the Asset Comments section of each Equipment Item providing details as to why that Equipment Item needs to be redone.

Note: The Asset Survey that the onsite Craftsperson receives in the Mobile App will only include the Equipment Items that are Un-Verified.

Step 1 – Use the available **Filters** to locate the returned survey.
Note: The Asset Survey will again be in the **Issued to Auditor** status.

Step 2 – Identify the survey that does not have a Craftsperson assigned in the **Performed By** field. You may need to scroll across the pane to see this column:

Note: The Survey may have previously been assigned to a Craftsperson but will have been unassigned when returned from the Tech FM. <u>See section 10.3 for more context</u>.

Step 3 – Assign a Craftsperson to this survey by selecting the **Edit** button in the Equipment Surveys pane:

				Survey Code	Survey Status	Survey Date	Description
☐							
					Issued to Auc ▾		
☑	Edit	Close	Print	G12_03_MECH	Issued to Auditor	8/2/2023	Survey Description - include Info - AM
☐	Edit	Close	Print	TEST-TTS	Issued to Auditor	27/1/2023	
☐	Edit	Close	Print	TEST-TIME	Issued to Auditor	27/1/2023	
☐	Edit	Close	Print	TEST-TT-TIME	Issued to Auditor	27/1/2023	

Step 4 – Use the **Performed By** look up field to find and look-up an appropriate Craftsperson:

Edit Survey and its Status ⤢ ✕

Survey Information

Survey Code   G12_03_MECH

Survey Date*   8/2/2023

Description   Survey Description - include Info -

Performed By*   [   ]

Work Team Code*   XYZ MECHANICAL

Survey Status   Issued to Auditor ▾

Step 5 – Select the required Craftsperson from the list:

Select Value - Employee ⤢ ✕

Occupant Name	Authentication Email Address
XYZSUPERVISOR	xyzsupervisor@sydney.edu.au
STEPHEN ANTHONY LISICA	stephen.lisica@sydney.edu.au
OMER MOHAMAD	omer.mohamad@sydney.edu.au
MATTHEW VELLA	matthew.vella@sydney.edu.au
MATTHEW GRENFELL	matthew.grenfell@sydney.edu.au
MARTIN AYRES	martin.ayres@sydney.edu.au
KATRINA ERIN MILLINER	katrina.milliner@sydney.edu.au

Step 6 – Select **Save** to continue.

Step 7 – Each Equipment Item that was returned will need to be re-verified before the Asset Survey can be progressed. Ensure you check all notes against each item to understand the review or actions required.

Follow the steps in section **9.2 Verification of Equipment Items** to complete the verification of these items. Repeat the steps for each returned item in the survey.

Once complete, the Asset Survey can then be re-verified, see section **9.4 Verification of Asset Survey** to complete this step.

10. Step 5 – Changes Copied to EQ Table (by Tech FM)

Objective

Review the updates verified by the Contractor Supervisor.

Role

Tech FM (Web Client)

Overview

Using the Web Client, the COS Tech FM will review all updates made by the onsite Craftsperson, and subsequently verified by the Contractor Supervisor. Upon successful review, changes can be copied to the EQ Table (Archibus Database).

If there are items that cannot be copied to the EQ table, then the survey can be returned to the contractor where those non-copied items are to be redone.

Next Step

Close the Asset Survey

10.1.   Review Changes

This action occurs after the Contractor Supervisor has verified each individual Equipment Item and subsequently changed the status of the Asset Survey to Audit Verified status.

Step 1 – Use the available Filters to locate the completed survey.

Step 2 – Select the survey in the Equipment Surveys pane. Putting a tick in the **Check Box** for this survey will display all the Equipment Items in the Survey Items pane.

Note: Ensure that only the 1 survey is selected otherwise you will see Equipment Items for multiple surveys.

Step 3 – Identify which Equipment Items have been updated and verified by the contractor. Do this by adding in the following fields into your current view:

- **Verified?** – indicates whether an Equipment Item has been verified or not (yes/no field)
- **Verified By** – shows who verified the Equipment Item
- **Verify Date** – the date that the Equipment Item was verified
- **Copied By** – Who copied the changes to the EQ Table
- **Copied Date** – When changes were copied to the EQ Table

These fields will allow you to confirm that each Equipment Item has been reviewed and verified by the Contractor Supervisor.

Note: If the status of the survey has been changed to Verified by the Contract Supervisor, it is not accurate to assume that each individual Equipment Item has been reviewed and verified by that person. It is possible to change the status of the Asset Survey to Audit Verified without individually verifying each individual Equipment Item.

Step 4 - Use the Edit feature to review any changes made and verified by the contractor roles. **Note**: this pop-up displays 2 panes side by side so that you can compare the original data for the Equipment Item and the new data for the Equipment Item. Where there have been changes to any of the equipment fields, these will be highlighted in red for ease of comparison.

Step 5 – Override any changes (if required) and select **Save** to record any changes that you have made before closing this window.

Next is the updating of the **Archibus EQ Table** with any changes made to an Equipment Item. The different ways this can be achieved is covered in section **10.2 Copy to EQ Table**.

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10.2.   Copy to EQ Table

Caution: When you copy data to the EQ Table, you are **overwriting any existing data** with the new, or changed data as provided by the contractor. This process is irreversible.

Prior to copying asset data to the EQ Table, it is very important that you are aware of what has changed. Some assets will have a lot of significant change recorded through the Asset Survey process; others will have very little data changed. To assist with identifying which assets have been changed, the individual Equipment Items in the Survey Items pane will be highlighted if there is a change recorded against any of the asset fields.

To review and assess the changes in asset data, follow the steps noted in section **10.1 Review Changes** of this document.

Copying to EQ Table can be done individually or in bulk.

Individual Copy – Method 1
Step 1 – Select **Edit** on an Equipment Item in the Survey Items field.

				Verified? ⇕	Verified by ⇕	Verify Date ⇕	Copied by ⇕	Copy Date ⇕	Copied To Equipment? ⇕
☐				⌄					
☐	**Edit**	Verify	Un-Verify	Yes	NATASHA YEE	9/2/2023			No
☐	Edit	Verify	Un-Verify	Yes	NATASHA YEE	9/2/2023			No

Step 2 – Select **Copy to EQ Table** at the bottom of the pop-up window.
Note: The advantage of this method is that you can review any changes made in the Edit pane before deciding to Copy those changes to the EQ Table.

Step 3 – Select **Yes** to confirm the action when prompted, or select No to cancel:

Confirm ✕

❓ This action will update the Equipment table with the results of this survey. Proceed?

[Yes] [No]

Note – Action successful notification:

campusassist-uat.sydney.edu.au says

Copy to Equipment successfully completed.

[OK]

Step 5 – The completed action is recorded in the Survey Items pane:
Note: the **Copied By** and **Copied Date** fields are now populated.
Note: Copy to Equipment is disabled for that Equipment Item. No further changes can be made to this Equipment Item.

				Verified? ⇕	Verified by ⇕	Verify Date ⇕	Copied by ⇕	Copy Date ⇕	Copied To Equipment?
☐				⌄					
☐	Edit	Verify	Un-Verify	Yes	NATASHA YEE	9/2/2023	NATASHA YEE	9/2/2023	Yes
☐	Edit	Verify	Un-Verify	Yes	NATASHA YEE	9/2/2023			No
☐	Edit	Verify	Un-Verify	Yes	NATASHA YEE	9/2/2023			No

Individual Copy – Method 2
Step 1 – Select **Copy to Equipment** for an individual Equipment Item

Note: There is no option to review changes with this method. It is expected that you had previously satisfied yourself of the accuracy of the information contained in the Equipment Details prior to proceeding with the Copy to Equipment Table.

				Verified? ⇕	Verified by ⇕	Verify Date ⇕	Copied by ⇕	Copy Date ⇕	Copied To Equipment? ⇕	
☐				⌄						
☐	Edit	Verify	Un-Verify	Yes	NATASHA YEE	9/2/2023	NATASHA YEE	9/2/2023	Yes	Copy To Equipment
☐	Edit	Verify	Un-Verify	Yes	NATASHA YEE	9/2/2023			No	Copy To Equipment
☐	Edit	Verify	Un-Verify	Yes	NATASHA YEE	9/2/2023			No	Copy To Equipment
☐	Edit	Verify	Un-Verify	Yes	NATASHA YEE	9/2/2023			No	Copy To Equipment
☐	Edit	Verify	Un-Verify	Yes	NATASHA YEE	9/2/2023			No	Copy To Equipment

Step 2 – Select **Yes** to confirm the action when prompted, or select No to cancel:

Confirm ✕

❓ This action will update the Equipment table with the results of this survey. Proceed?

[Yes] [No]

Step 3 – Confirm that the completed action is recorded in the Survey Items pane:

Note: The **Copied By** and **Copied Date** fields are now populated.
Note: Copy to Equipment is disabled for that Equipment Item. No further changes can be made to this Equipment Item.

Verified?	Verified by	Verify Date	Copied by	Copy Date
Yes	NATASHA YEE	9/2/2023	NATASHA YEE	9/2/2023
Yes	NATASHA YEE	9/2/2023	NATASHA YEE	9/2/2023
Yes	NATASHA YEE	9/2/2023		
Yes	NATASHA YEE	9/2/2023		
Yes	NATASHA YEE	9/2/2023		

Bulk Copy
Step 1 – Select one or more Equipment Items by putting ticks into the **Check Boxes** at the left of the Survey Items pane.

					Survey Code	Equipment Code	New Equipment Code
☐							
☐	Edit	Verify	Un-Verify	Copy To Equipment	G12_03_MECH	37373929393837	
☐	Edit	Verify	Un-Verify	Copy To Equipment	G12_03_MECH	7000201	
☑	Edit	Verify	Un-Verify	Copy To Equipment	G12_03_MECH	G12-03-324-14428-1	
☑	Edit	Verify	Un-Verify	Copy To Equipment	G12_03_MECH	G12-03-C300-13703-01	
☑	Edit	Verify	Un-Verify	Copy To Equipment	G12_03_MECH	G12-03-L300-14421-1	

Step 2 – Select the **Copy to Equipment** button located in the header bar of the Survey Items pane. This will perform the Copy to EQ Table action for all selected Equipment Items.

Survey Items ⚙ | Add New | XLS | Verify | **Copy to Equipment** | Photo/Comment Filter On
Equipment Code: 3¹ 7¹ G³ All⁵

Step 3 – **Confirm** the action when prompted:

Confirm ✕
? This action will update the Equipment table with the results of this survey. Proceed?
[Yes] [No]

Note– Action successful notification will appear:

campusassist-uat.sydney.edu.au says

Copy to Equipment successfully completed.

OK

Step 5 – The completed action is recorded in the Survey Items pane:
Note: The **Copied By** and **Copied Date** fields are now populated.
Note: Copy to Equipment is disabled for Equipment Items. No further changes can be made to the Equipment Items.

				Verified?	Verified by	Verify Date	Copied by	Copy Date
☐				⌄				
☐	Edit	Verify	Un-Verify	Yes	NATASHA YEE	9/2/2023	NATASHA YEE	9/2/2023
☐	Edit	Verify	Un-Verify	Yes	NATASHA YEE	9/2/2023	NATASHA YEE	9/2/2023
☐	Edit	Verify	Un-Verify	Yes	NATASHA YEE	9/2/2023	NATASHA YEE	9/2/2023
☐	Edit	Verify	Un-Verify	Yes	NATASHA YEE	9/2/2023	NATASHA YEE	9/2/2023
☐	Edit	Verify	Un-Verify	Yes	NATASHA YEE	9/2/2023	NATASHA YEE	9/2/2023

Note: There is no option to review changes with this method. It is expected that you had previously satisfied yourself of the accuracy of the information contained in the Equipment Details prior to proceeding with the Copy to Equipment Table.

Note: Bulk Copy is not recommended as it does not encourage the accurate review of changes made to Equipment Items prior to effecting the permanent overwriting of data in the Archibus EQ Table. You might also experience slower performance with Bulk Copy.

Note: You have the option to Un-Verify any items that you are not satisfied with. **You cannot Un-Verify after the data has been Copied to the EQ Table**. Un-verified equipment items can be returned to the contractor to redo, this action is covered in section **10.3 Return Survey to Contractor** of this document.

10.3. Return Survey to Contractor

Where there are individual Equipment Items in the Asset Survey that cannot be copied to the EQ Table, or contain incorrect information, it is possible to return these Equipment Items to the contractor to be re-surveyed.

The steps laid out in this section facilitate the returning of the Asset Survey to the onsite Craftsperson so that they can redo any Equipment Items requiring further action.
Note: Not all Equipment Items from the original Asset Survey will be returned to the onsite Craftsperson. They will only see Equipment Items that you, as the Tech FM, have indicated as Un-Verified.

It is assumed that you have already reviewed the changes to Equipment Items as per the steps noted in section **10.1 Review Changes** of this document. For any Equipment Items that are correct and are to be copied to the Archibus EQ Table, follow the steps as noted in section **10.2 Copy to EQ Table** of this document.

Step 1 – Use the available **Filters** to locate the Verified survey.

Step 2 – Select the survey in the Equipment Surveys pane. Putting a tick in the **Check Box** for this survey will display all the Equipment Items in the Survey Items pane.
Note: Ensure that only the 1 survey is selected otherwise you will see Equipment Items for multiple surveys.

Step 3 – Select **Edit** for an Equipment Item in the Survey Items field.

Step 4 – Add a comment into the Asset Survey Comments field.
Note: it is important that you communicate to the Craftsperson why this Equipment Item needs to be redone.

Step 5 – Select **Save** to record the changes and close this pop-up window.

Note: The Equipment Item will automatically revert to Un-Verified once you edit and save any changes to the item.

Step 6 – Return the Asset Survey to the Contractor Supervisor. Do this by selecting Edit in the Equipment Survey Pane:

Note: the status of the Asset Survey is currently in Audit Verified status.

Step 8 – Change the status of the Asset Survey from Audit Verified to **Issued to Auditor**.

Step 9 – Ensure that the **Performed By** field is **empty.**

Step 10 – Select **Save** to complete the process and return the survey.

Note: You may wish to notify the relevant Contractor Supervisor so that they are aware that the Asset Survey has been returned to them and that they need to action it further.

Note: There is no further action required from the Tech FM for this Asset Survey until it is returned to the **Audit Verified** status by the Contractor Supervisor. At such time, the Tech FM can re-review the changes and either Copy to the EQ table or return Equipment Items to the contractor again.

11. Step 6 – Audit Closed (by Asset Manager or Tech FM)

Objective	Close the Asset Survey preventing any further changes.
Role	Tech FM (Web Client)
Overview	This is the final step in the Asset Survey process. All changes made and verified by the contractor have been accepted by the COS Tech FM and copied to the EQ Table (Archibus Database). The status of the Asset Survey is to be changed to Audit Closed thereby preventing any further changes from being made.
Next Step	None, end of process.

11.1. Close Audit

The final step in the process for any Asset Survey is for the status to be changed to Audit Closed. This action should occur if the survey meets the following criteria:

1. There are no individual Equipment Items that need to be returned to the contractor to be re-surveyed. And;
2. All individual Equipment Items that had been changed and required updating in the Archibus EQ Table have been copied to the EQ Table.

If both of these conditions have been met, then the status of the Asset Survey should be changed to Audit Closed.

Step 1 – Use the available **Filters** to locate the Verified survey.

Step 2 – Select **Edit** for the Asset Survey in the Equipment Surveys pane.

Step 3 – Change the status of the Asset Survey to **Audit Closed**.

Step 3 – Select **Save** to affect the status change.

Note: It is possible to update the status of the Asset Survey to Audit Closed without copying all Equipment Items to the Archibus EQ Table.

Caution: Once the survey status has been changed to Audit Closed, the survey will be locked, and no further changes can be made.

12. Support

Technical Support
Any questions relating to Campus Assist should be directed through to the **Shared Service Centre**.

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

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

Operational Support
For operational support please contact your COS Tech FM, or other COS representative