

## Archibus V25.3 Webinar FAQs

**Q1. If we define different checklist against different PM Procedure, can we control using single SLA or we need to define different SLA for each PMP?**

A1. If each PM Procedure needs a different checklist, then it would require a different SLA for each of those PM Procedures.

**Q2. Can you attach a compliance questionnaire?**

A2. Yes, this is correct. In Define SLA > "Add Checklist" popup, you have a choice to link "Compliance Questionnaire" or "Maintenance Checklist". If you created new or have some existing compliance questionnaires, you can choose the "Compliance Questionnaires" option, then link the questionnaire to the SLA.

**Q3. Can the user defined field be used in the floor table?**

A3. Yes. You can add user define fields for Buildings (bl table), Floors (fl table), Rooms (rm table) and Employees (em table). Additionally, you can promote any existing fields from these tables that does not exist already in the Define form and enter data on them or report on them.

**Q4. In the back-to-work features, can the user define distance 6' 4' or 8'?**

A4. Yes. For 25.3 you can enter up to 1 decimal. Just remember that the Safe Distance Target in Archibus means the radius of the circle around a desk. So, if you need to maintain 8ft distance between 2 desks, enter 4 as the Safe Distance Target. 4ft from one desk + 4 ft from the neighboring desk = 8 ft.

**Q5. In the back-to-work features, reservations require additional modules?**

A5. We added back-to-work enhancements to Hoteling, which allows booking workspaces. We did not add any back-to-work enhancements to Meeting Reservations. If you just want to be able to restrict rooms to be booked by their status (ex. do not allow to book rooms that requires cleaning) then that is the Hoteling module. If you also want to take advantage of the automated service requests to clean the floor at the end of the day (if it had bookings) then you would also need the Corrective Maintenance module. The changes that we made are not dependent on any other modules and are part of the out of the 25.3 release.

**Q6. In the back-to-work features, which module is the cleaning of rooms scheduling available?**

A6. Hoteling + Corrective Maintenance. Hoteling allows booking the workspaces based on their status (ex. available/require cleaning), while the Corrective Maintenance module tackles the actual service request for cleaning the floor. See also my response to question 14.

**Q7. How soon can we expect the BIM integration be implemented?**

A7. We don't yet have a firm timeframe for Forge integration to be product-ready. Currently it's a proof-of-concept, and we will continue to work on it into 2021.

**Q8. Can you control who can book hoteling space by the department they belong to and department the space belongs to?**

A8. In Archibus WebCentral, in the Create Booking view, the user is able to search hotelable rooms by Division and Department. In the Workplace web application, the user can highlight hotelable rooms by Department. However, the user is not prevented to book a desk in a room that belongs to a different department. This is very good idea and please add it to UserVoice, so it gets votes and we can build on it.

**Q9. When adding user defined fields, do we need to be concerned with data type or normalization?**

A9. No. We have taken many steps to simplify how user defined fields are defined so that users only take minimal decisions. For example, for data type this is determined by Archibus based on field type you are trying to define. Another example, is that for date fields no decision is needed, except whether you want to have the



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Current Date as default value or not. Here is a [detailed topic](#) on these options and the decision that you may need to take.

**Q10. In the Demo, all answers were Yes/ passed. however, can you show answer of NO with comment?**

A10. Yes, you can, as long as you add a follow-up option to prompt for comment if the answer is "No" when you define the question. We did not have time to demo during webinar for the "failed" or "no" answers but in survey report we showed, you can see that Fire Door 12 has some "failed" answers.

**Q11. How granular can a user get with the available workspace reservation, can the user schedule usage in minutes or hour intervals?**

A11. Available time slots / day parts are: Full Day, Morning or Afternoon. System Administrators can setup the time intervals for Morning and Afternoon.

**Q12. Is this limited to the bl, em, rm table?**

A12. You can add user define fields for Buildings (bl table), Floors (fl table), Rooms (rm table) and Employees (em table). Additionally, you can promote any existing fields from these tables that does not exist already in the Define form and enter data on them or report on them.

**Q13. Can newly created user defined fields be translated into another language?**

A13. Yes. System Administrators can use the view titled "View Archibus Translation Dictionary" to enter translations for user defined fields and for any fields.

**Q14. Are custom fields available in the RE/Lease module?**

A14. For Buildings and Floors they are available here: Real Property/Portfolio/Background Data/Define Locations. This is because the Define Locations view is available in many Archibus modules. I recommend that in the Navigator, you search by 'Define Rooms' or 'Define Locations' or 'Define Employees' to get to the views that support user defined fields.

**Q15. Are checklists available in RE/Lease module?**

A15. Not yet. We would like to hear the business cases for RE/Lease module. Would you please create a UserVoice idea?

**Q16. Is there a PM scheduler?**

A16. Yes, we call it PM Planner, you can access it from Maintenance/Preventive Maintenance/Maintenance Manager/PM Planner

**Q17. Are the user defined fields only for bl, fl, rm and em?**

A17. Yes in 25.3. For 25.4 we are planning to add User Defined Fields for Equipment and Equipment Standard.

**Q18. Is the maintenance checklist accessible from Web Central?**

A18. Not yet for 25.3. We are working on this use case for 25.4, to support maintenance checklists from Web for supervisors and craftsperson.

**Q19. Are the new user defined fields available to use right away or do you need to restart tomcat?**

A19. In single server deployments and these are most of the deployments, no need to restart the application server. You will just need to refresh the Define Locations or Define Rooms view to see the new field. The only case we found that may require application restart is for clustered-cloud deployments, one of the instances had the new fields, but others did not.

**Q20. Do you need a BIM360docs license to make use of the Forge integration?**

A20. Forge integration does require specific licensing, but it's not a BIM360docs license. Rather, there's a subscription fee and Cloud Credits that give access to the APIs.



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[Q21. In order to have a checklist based on equipment, would you need to have a different SLA based on equipment? Or could you have a survey attached to an equipment?](#)

A21. Backing up from your question, I would ask, is this checklist only for one particular equipment, or for an equipment standard? Often times, all equipment from the same equipment standard shares the same checklist(s). But if your checklist is "for this one equipment only", then yes, you will need a SLA for that equipment, this way you can make sure that the checklist only linked with the work that are specific to this equipment.

[Q22. Can we control, by role, who can edit the new fields vs. existing fields? For instance, an facilities engineer might update the pressure, but NOT the room type.](#)

A22. System Administrator can do this by using the Archibus Data or Field Dictionaries. They can specify the allowed security group for a field. Access to creating all user-defined fields is controlled by a security group.

[Q23. How do we gain access to the Serraview Space IQ forum for idea voting?](#)

A23. Those forums are available to Serraview and SiQ users, respectively.

[Q24. With the checklist, can it be used across multiple equipment, to make it faster for the technician to go through Preventative Maintenance, once they return to the office and a shared computer.](#)

A24. Multiple equipment can link to the same checklist; however, each equipment will have its own survey. This is because technician might give different answers to different equipment for the same questions in the survey. Another reason is that we want to enforce the workflow that technician goes through survey questions for each equipment. Another possible way to handle this is to define a general checklist for a building or floor, and then that checklist can apply to all equipment on that floor if you so choose.

[Q25. On Return to office, does it allow for 2 weeks in office, 2 weeks work at home?](#)

A25. Please use the field 'Return to Work Info', either alone or together with the 'Days In Office' field. For example, you could use Return to Work Info only, and define two cohorts: "in office first half of month" and "in office second half of month" to distinguish between these two cohorts.

[Q26. With the BIM modeling, is the data housed in Archibus or just links to the data?](#)

A26. Both. Data from the model and data from the Archibus database can be shown.

[Q27. Can Team Space be used with Hoteling Module? In other words, can space be set up as Team Space, and employees will use hoteling to book the space.](#)

A27. No. Team Space is typically used for groups of people who can hotdesk within a certain area of the floor. I believe the need identified here is to define a team space within which a person can book space, but only with the user's defined team space. This is a good idea but not yet implemented that way.

[Q28. Is there a report which shows that the Equipment QR code was scanned using the mobile App doing a work request? This is a requirement for clients who want to make sure that the craftsperson has visited the site of problem before closing the request.](#)

A28. This is a good use case. We do not support "bar code scan" field in checklist yet in 25.3. Please submit a User Voice idea.

[Q29. Will there be a change in price for the licenses?](#)

A29. Please contact your Archibus Provider.

[Q30. Can you view booked rooms that aren't clean?](#)

A30. Yes. You can search for rooms of the status "Requires Cleaning" from the Bookings for a Date Range report.

[Q31. When the cleaning requests are generated, can the questionnaires in maintenance apply to the desk booker? I.e. a checklist that the desk booker did cleaning tasks.](#)

A31. Not yet, but we will be considering it. Please add this idea to User Voice.

**Q32. In what tables/fields are the hoteling reservations stored?**

A32. They are stored in the `mpct` and `activity_log` tables

**Q33. Will this function be available in what modules? On Demand?**

A33. It is available through the Maintenance Module - Both Corrective and Preventive Maintenance.

**Q34. Is the back-to-work feature in the Space Management Module?**

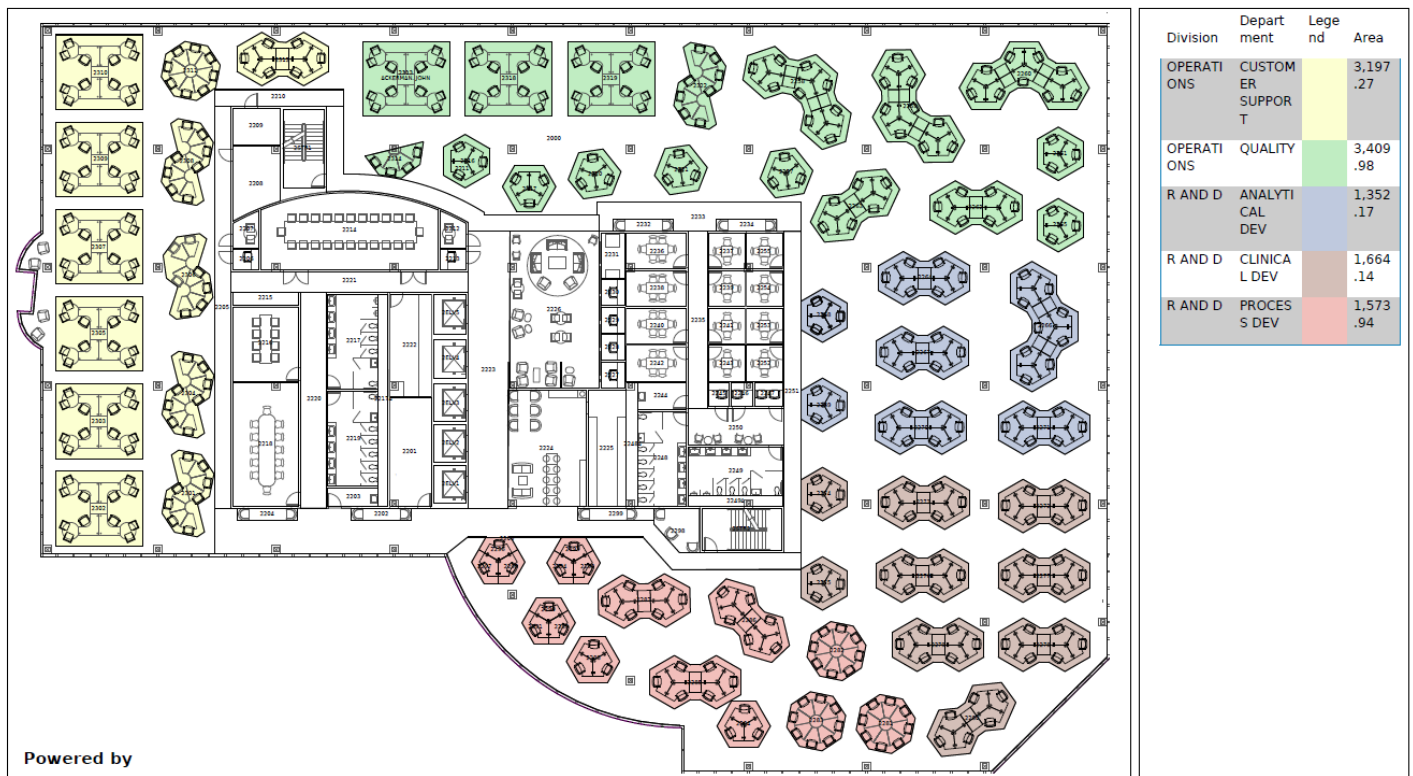
A34. Back-to-Work includes multiple features that span across Space, Hoteling and On Demand modules. There is also a Dynamic Workplace home page with related metrics.

**Q35. How far away is V25.4 from being deployed?**

A35. We are working on a quarterly release cadence, so we aim to release 25.4 early in the new year.

**Q36. Can the entire floor plan that is shown in the Space Console be exported into a Word/PDF, what does that look like?**

A36. Yes, several ways you can do this. For example, you can export the entire floor plan with highlight/legend to PDF using Space Console's Ad Hoc Export action. Please see the example below.



DEPARTMENT OF FACILITIES		PROJECT NO: DATE: 11/11/20 DRAWN: AFM CHECKED: SCALE: (SCALE)	NC05 - Second Floor  SPACE ACCOUNTING FLOORPLAN	NC05.02
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**Q37. Will the new fields be portable to version upgrades?**

A37. Yes. They are regular database fields.

**Q38. Can I restrict by the work request that a survey was carried out for? I did not see it as a field to select from in the report.**

A38. Yes, we added "WR" field to the survey report in 25.3. You can filter on the `wr_id` field, or use mini-console to filter in the survey report.



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**Q39. Are these out-of-the-box Archibus V.25.3 options or add-ons?**

A39. All features presented are available out-of-the-box in V.25.3, up to the section on "Discovery". The items in Discovery and beyond that are not in V.25.3.

**Q40. Will the User defined fields be rolled into the Assets/equipment and Planned Maintenance modules and when will this be achieved?**

A40. For 25.4 we are working on adding User Defined Fields for Equipment and Equipment Standard under Assets module.

**Q41. Can a check question trigger another function such as a Service Request and can you default information (such as location data) into that Service request?**

A41. Yes, when define your question, you can add a "follow-up action" to answer(s) as "Create Service Request" action, which will display a "Create Service Request" button on mobile when craftperson gives this answer. This action will invoke a form for you to input detailed information such as location data.

**Q42. Does the User defined field require a server restart?**

A42. In single server deployments and these are most of the deployments, no need to restart the application server. You will just need to refresh the Define Locations or Define Rooms view to see the new field. The only case we found that may require application restart is for clustered-cloud deployments, one of the instances had the new fields, but others did not.

**Q43. Are the checklists out-of-the-box or a module that has to be added?**

A43. Checklists are available out of the box in V.25.3 for Corrective and Preventive Maintenance applications.

**Q44. Can these checklists be used to do condition assessment during a Survey or more importantly after a PM or repair and send the results to BUILDER to update/maintain overall Facility Condition Assessment in BUILDER?**

A44. Not at this time. Condition Assessment still uses the older questionnaires framework.

**Q45. Can these be used effectively to completely replace PM procedures?**

A45. I assume what you meant is to eliminate PM Procedure steps that some customers created for similar purpose of having craftsperson go through each checklist step in previous versions? If so, you will still need to have a PM Procedure and one PM Procedure step, then link checklist to this PM Procedure. You no longer need to add many steps for the PMP anymore.

**Q46. How can staff data such as name and building and floor and room be loaded into Archibus database from active directory, with active directory on prem or cloud based, for ongoing data sync from AD to Archibus. I work for government department in Ottawa.**

A46. Please contact your Archibus Provider about these types of integrations.