Estates and Buildings Information System

User Guide

ARCHIBUS/FM V17

PAT Testing PPM Housekeeping Schedule User Guide

Foreword

This User Guide document has been designed for the purpose of training relevant members of staff within Estates and Buildings.

System Support

If you require assistance please contact Ebisusers@ed.ac.uk in the first instance. All urgent requests should be directed to the Ebisusers Support Desk on ☎ 50 9683.

More information on the EBIS Project is available at:-

http://www.ebis.estates.ed.ac.uk

Logging on to EBIS Online

Login to the following url using user name and password which are supplied by Ebisusers.

https://www-live.ebis.estates.ed.ac.uk

This will open menu bar showing what access you have been set up with.

Logging on to Archibus

Double click on the Archibus-FM 17 icon on desktop to open Core Archibus Program.

In Project double clik on to open up Project

Enter User Name and Password – which are supplied by Ebisusers – then click OK

This will now open up the Archibus/FM Navigator showing all modules/groups you have access to.

Setting up Procedures and Steps

Once you have logged into Archibus first thing you require to do is set up the Procedures and Steps for the PAT Tester Procedures. Select Plan Preventive Maintenance | Schedule Preventive Maintenance | Create Procedures and Steps
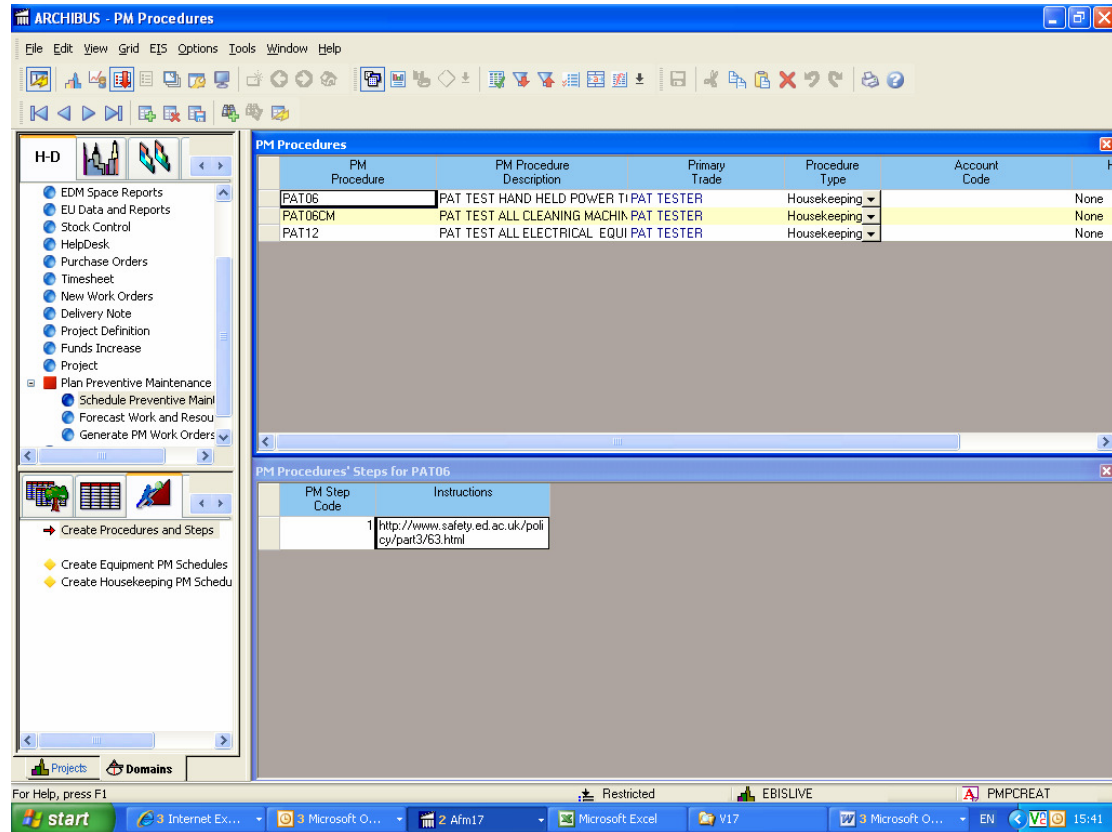
To enter a new PM Procedure click insert and enter details of new Procedure.

For PAT Testing PM Procedures should be set up as follows:-

PAT06 – PAT Test Hand Held Power Tools
PAT06CM – PAT Test all Cleaning Machines
PAT12 – PAT Test all Electrical Equipment

Primary Trade will be PAT TESTER – this can be typed directly into field or double click on field to bring back list of values and select PAT TESTER from here.

Procedure Type should be Housekeeping

For each PM Procedure set up PM Procedures Steps must be set up. PM Step Code should always be 1. To enter instructions double click on field to bring back memo editor. Enter instructions then OK

Setting up Schedules

These Procedures now require to be scheduled against relevant Buildings. Select Plan Preventive Maintenance | Schedule Preventive Maintenance | Create Housekeeping PM Schedules for Building Only
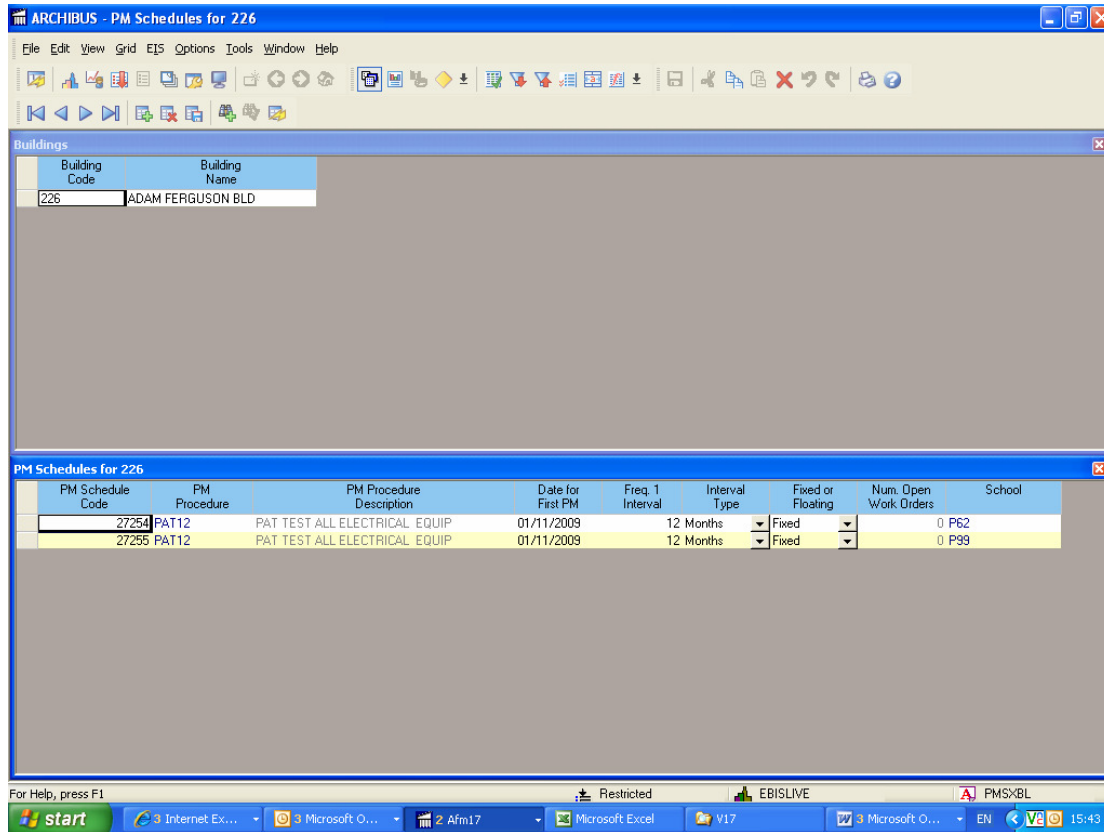
Select Building you require to set Schedules for then click on PM Schedules table at bottom. If there are already Schedules set up for this building click insert to add a new one.

PM Schedule Code and PM Procedure Description are automatically generated after Schedule is entered and committed.

Enter PM Procedure or double click on field to select from List of Values.

Date for First PM should be entered as the date you want the first Work Order to be generated.

Freq 1 Interval and Interval Type are the periods for which to want the procedure to come out ie if you want procedure to come out every 6 months the Freq 1 Interval would be 6 and the Interval Type would be months.

Fixed or Floating should always be set to Fixed.

Ignore Number Open Work Orders.

School can be typed direct into field or double click to select from List of Values. School always requires to be selected as this field is used in the billing process to decipher whether or not this work is rechargeable.

Schools within Colleges MVM and SCE are rechargeable for PAT Testing works carried out as are the normal rechargeable areas ie Accom Services, Pollock Halls etc.

Changing Date or Procedure no longer required

If a PAT Test PPM job is no longer required select Plan Preventive Maintenance | Schedule Preventive Maintenance | Create Housekeeping PM Schedules for Building Only, select building for which you wish to cancel the PAT Test PPM job and set the Freq 1 Interval to 0 – this will stop the Schedule from generating.

If the Maintenance Manager requires the job to come out in a different month change the Date of First PM and the Date Last Generated (Mass) (this field will require to be switched on) to the next date job has to be generated on.

Procedures and Steps or PM Schedules should never be deleted