

User Guide

ARCHIBUS/FM V17

PPM – Importing and Exporting PDA

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 <u>Ebisusers@ed.ac.uk</u> in the first instance. All urgent requests should be directed to the Ebisusers Support Desk on **2** 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/ebistop.cfm

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 Archibus on desktop to open Core Archibus Program.

In Project double clik on EESLIVE 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.

PPM Importing and Exporting User Guide

Importing

Make sure PDA is in docking station

Before carrying out Import or Export of PPM jobs double click on PDASyncServer on desktop to connect to pda.



From PDA Select PPM_Mgmt from App Center Screen.



Click on Sync PDA to Sync with Archibus

PDA Application	# ◀€ 8:37
Select Application:	
PPM Application	-
Sync PDA	Enter
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This will then bring up login screen where you should enter User Name and Password and select Import From Archibus to start the sync process. This will take a while.

# 5	/nc PD/	A 🛛 🗱 📢 14:44	×
PPM Application			
User	Name:	jane]
Passv	vord:	***]
			-
Import From Archibus			
Export To Archibus			
Preparing Import. Please wait			
E	кit		

Select supervisor, to date, building from and building to and trade and click on Import. In order to Import all Work Orders for the selected Supervisor you should select full building range.

Import	🟠 🍢 🛿 2:03p
Supervisor:	PETER REYNOLDS
To Date:	04/02/2009 👻
Building Ran Building: 0001 - OLD C	
Building:	
0001 - OLD CO	DLLEGE 🗸
Trade: HEATING ENG	INEER
In	port Enter
Exit	
Import	🛆 🥆 🕅 2:04p
Supervisor	
To Dohou	
Sync PD/	
Bu ? A DU ? ir bu Bu	Are you sure you want to mport data from Archibus o PDA?
00	Yes No 🚽
Trauc.	
HEATING ENG	
In	port Enter
Exit	

Click Yes

Import	🛆 ^Y x 🛿 2:09p	
Supervisor: To Date:	PETER REYNOLDS	•
Buildin Sync Buildir 0001 - Buildir 0001 -	PDA ok Import completed successfully.	•
Trade: HEATING ENG	iNEER nport Enter	•
Exit		

Click ok. PDA is now ready for Supervisor to carry out work on Jobs which have been imported to PDA.

Exporting

Once work has been completed on PDA this should then be Exported back to Archibus. To do this:

Make sure PDA is in docking station

Before carrying out Import or Export of PPM jobs double click on PDASyncServer on desktop to connect to pda.



Click on PPM_Mgmt from App Center to open Program.

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Calculator	PPM_N	/lgmt		
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New Tools				

Click on Sync PDA

PDA Application	🚓 📣 15:36
Select Application:	
PPM Application	-
Sync PDA	Enter
Exit 📟	

🏄 Sync F	DA	, 🚓 ┥× 15:3	7 🗙
	PPM Appli	cation	
User Nam	e:		
Password	:		
In	port From A	Archibus	
	Export To Ai	chibus	
Exit			

Enter Username and Password then click Export to Archibus

fter Export	🗱 ┥× 15:39
Select status:	
Completed O	nly
Export	Enter
Exit	

Click on All and Export

fi Ex	port	‡ 4 × 15:40	
Selec	t status:		
Syn	E PDA		
	Are you export Archibu	u sure you want to data from PDA to us?	
	Yes	No	
			_
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Click Yes

This could take about 10 minutes depending on amount of work orders.



Click ok then exit. Export is now complete