



Estates and Buildings Information System

# *User Guide*

*ARCHIBUS/FM V17*

---

# *Trades Work Order Process 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](mailto: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 click 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.

## Entering Works Request Management

In order to access Reactive Work Orders open Maintenance | Trade Team Work Orders within EBIS Online

### Work Requests Management

Name Steven Martin

Team ACCOM

Type Team Leader

From Building

To Building

From Date

To Date

Priority

Trade

Status

Request Type

Work Order No.

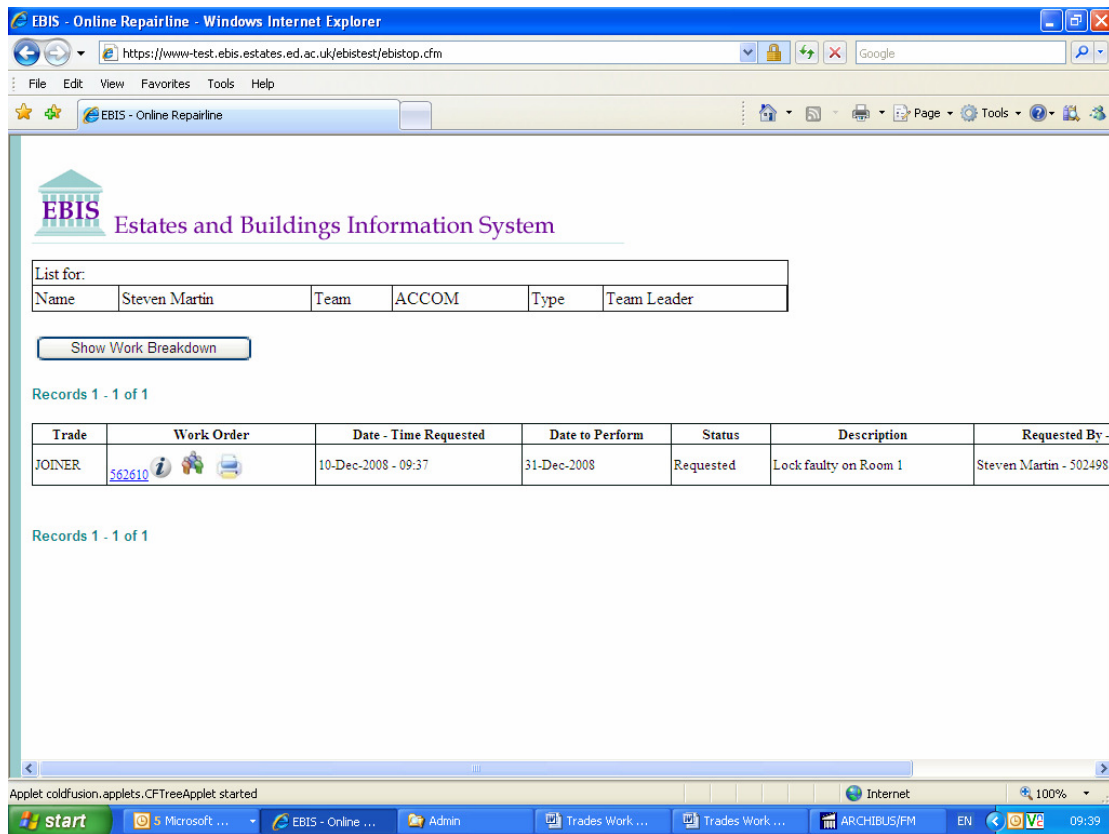
This screen will allow you to open Work Orders by selecting various criteria. In order to view new Reactive Work Orders select Trade from drop down list and click Submit – all Reactive Work Orders will come in with a Status of Requested until they are assigned to specific tradesperson.


To view PPM Housekeeping Work Orders select Trade from drop down list, change Status to Issued and In Process and Request Type to House Keeping and Submit – this will bring back all PPM Housekeeping Work Orders

Status

Request Type

Work Orders for Trades who are not designated to a specific team but who work round the whole University ie Keys, Roofs etc have all been set up under CENTRAL Zone. In order to bring back Work Orders for these Trades for entire University the Trade should be selected from the drop down. If Trade not selected Work Orders for these trades will be brought back in general search but only for buildings within the CENTRAL Zone.



If you hover over the  this will give you information on the job

**Work Request No.:** 562610  
**Requested By:** Steven Martin  
**Requested By - Tel.:** 502498  
**Building Name:** Churchill House  
**Status:** Requested  
**Requested On:** 10-Dec-2008 - 09:37  
**Date to perform:** 31-Dec-2008  
**Priority:** ROUTINE - LOW PRIORITY - 21 DAYS  
**Problem Description:** Lock faulty on Room 1

Click on the Work Order No to bring back details of the job.

WORK REQUEST NUMBER: 562610

Trade	<input type="text" value="JOINER"/>	Priority	<input type="text" value="R - Routine - Low Priority - 21 Days"/>
Status	<input type="text" value="Requested"/>	Building	<input type="text" value="801 - CHURCHILL HOUSE"/>
Job Done Date	<input type="text"/> ...	Last Date to Perform	<input type="text" value="31-Dec-2008"/> ...
PAT Tests	<input type="text" value="0"/>	IT No.	<input type="text"/>
Risk Assessment Type	<input type="text" value="Generic"/>	Risk Assessment No.	<input type="text" value="Select Risk Assessment No"/>
E & B Comments	<input type="text"/>	Description	<input type="text" value="Lock faulty on Room 1"/>
Is Festival Work?	<input type="text" value="No"/>		
<b>Permits Required</b>			
Lab Permit	<input checked="" type="checkbox"/>		
Asbestos Register	<input type="checkbox"/>		
Asbestos Permit	<input type="checkbox"/>		
Hot Work Permit	<input checked="" type="checkbox"/>		
Confined space Permit	<input type="checkbox"/>		
Roof Permit	<input type="checkbox"/>		
Working at Height	<input type="checkbox"/>		
Requested By	STEVEN MARTIN	Phone	502498
	<input type="button" value="UPDATE"/>		<input type="button" value="Back to List"/>

This screen should be used to update Work Order with Risk Assessment Type/Permits Required/Is this Festival Work?. If any specific Permits are required to carry out this work then the required permit should be ticked on this screen. The Risk Assessment defaults to Specific which will print out a Specific Risk Assessment when Work Order printed.

If Generic is selected the Risk Assessment No should be selected from the drop down. These are:


Risk Assessment No.

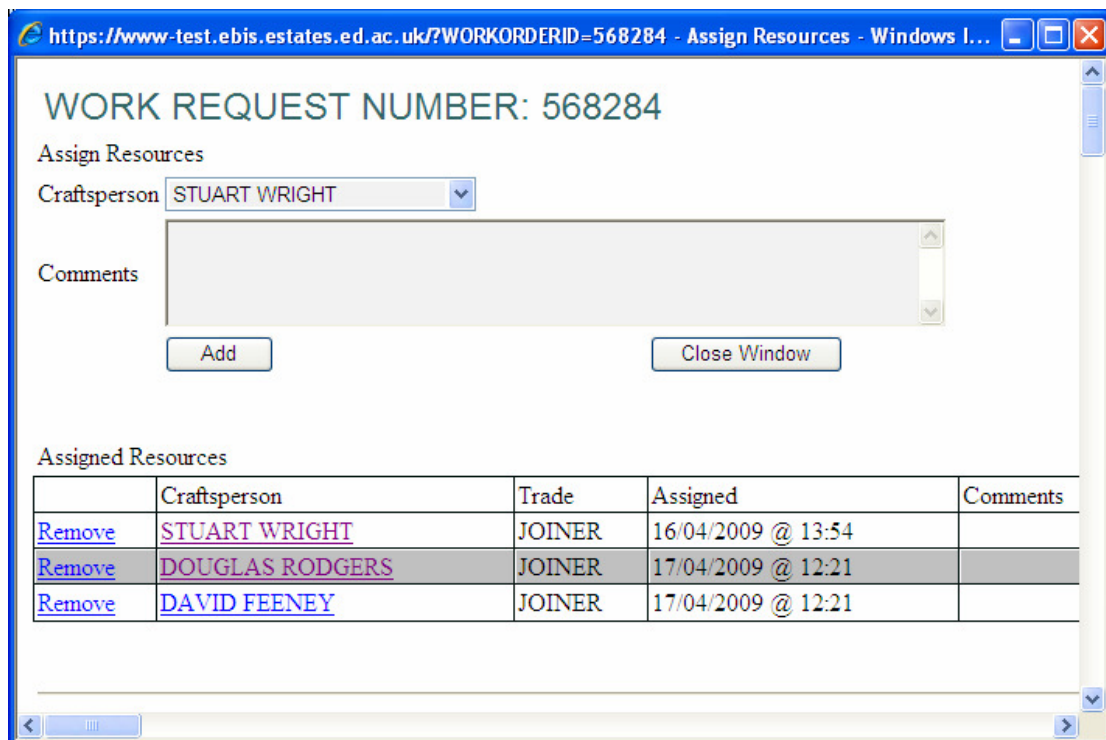
Description

- 0 - Electricians
- 1 - Heating Engineers
- 2 - Joiners
- 3 - Painters
- 4 - Plumbers
- 5 - Roofer Slater

When Work Order is print no Risk Assessment will be printed out

Once all fields have been updated on the Work Order screen click on Update - this will take you back to screen to assign resources and to print Work Order.

Click on Assign Resources icon  to assign Work Order to specific Tradesperson/s



WORK REQUEST NUMBER: 568284


Assign Resources

Craftsperson

Comments

	Craftsperson	Trade	Assigned	Comments
<a href="#">Remove</a>	<a href="#">STUART WRIGHT</a>	JOINER	16/04/2009 @ 13:54	
<a href="#">Remove</a>	<a href="#">DOUGLAS RODGERS</a>	JOINER	17/04/2009 @ 12:21	
<a href="#">Remove</a>	<a href="#">DAVID FEENEY</a>	JOINER	17/04/2009 @ 12:21	

Select the Craftsperson from the drop down list and then Add. You can add more than one Craftsperson to this Work Order. Once you have Assigned all Resources to this Work Order click on Close Window. Work Order status will set to Issued and In Process once Resources have been Assigned.

You should now print Work Order by selecting the print icon  . This will print this work order and will show all details which have been selected when Work Order was updated

<b>Work Order</b>					
Order No.	562609	Priority	P - ROUTINE - HIGH PRIORITY - 7 DAYS	Requested By	Steven Martin
Telephone No.	502498	Trade	HEATING ENGINEER	Building	Baird House - 0836
Room No.		Reported Date	02-Dec-2008	Due Date	09-Dec-2008
<b>Instructions</b>					
Test 3					
<b>Risk Assessment</b>					
Specific -					
<b>Permit to Work</b>					
<b>Work Progress</b>					
<b>Started</b>			<b>Completed</b>		
Date	Time		Date	Time	
Date	Time		Date	Time	
Date	Time		Date	Time	
Date	Time		Date	Time	
Date	Time		Date	Time	
Date	Time		Date	Time	
Date	Time		Date	Time	
Date	Time		Date	Time	

[https://www-test.ebis.estates.ed.ac.uk/ebistest/wod\\_print.cfm?WORKORDERID=56...](https://www-test.ebis.estates.ed.ac.uk/ebistest/wod_print.cfm?WORKORDERID=56...) 02/12/2008

**Specific Risk Assessment**

Is the activity covered by a model risk assessment which reflects the core hazards (things that could cause harm) and risks? (Likelihood of the harm identified actually happening) YES NO

Answering No produces a blank Risk Assessment

1. What could cause harm to you or to anyone else while the work is being done?

2. Who could be harmed?

3. What precautions/control measures are already in place that will protect you or anyone else from being injured in any way?

4. What else needs to be done to make the job safe?

**NB: the hierarchy of control**, avoid risk, evaluate anything that can't be avoided, combat at source, adapt the work to the individual, adapt to technical progress, develop a coherent overall prevention policy, give priority to collective measures and lastly give appropriate instruction to employees.

**WORK CAN ONLY PROCEED IF ALL THE CONTROL MEASURES IDENTIFIED HAVE BEEN PUT IN PLACE**

Signature of Line Manager:

Date:

Signature of Person(s) carrying out the work:

Date:

[https://www-test.ebis.estates.ed.ac.uk/ebistest//wod\\_print.cfm?WORKORDERID=56...](https://www-test.ebis.estates.ed.ac.uk/ebistest//wod_print.cfm?WORKORDERID=56...) 02/12/2008



## Entering Time for Work Orders

Once Tradesperson has completed job they should hand Work Order back to Assistant Team Leader in order for their time to be entered. Tradesperson should enter on Work Order Date and Time they started job and Date and Time they finished. A separate entry is required for each day so that hours are records correctly.

To enter time against a Work Order enter Work Order No on front screen of Trades Team Work Orders and submit:

## Work Requests Management

Name Steven Martin

Team ACCOM

Type Team Leader

From Building

To Building

From Date  ...

To Date  ...

Priority

Trade

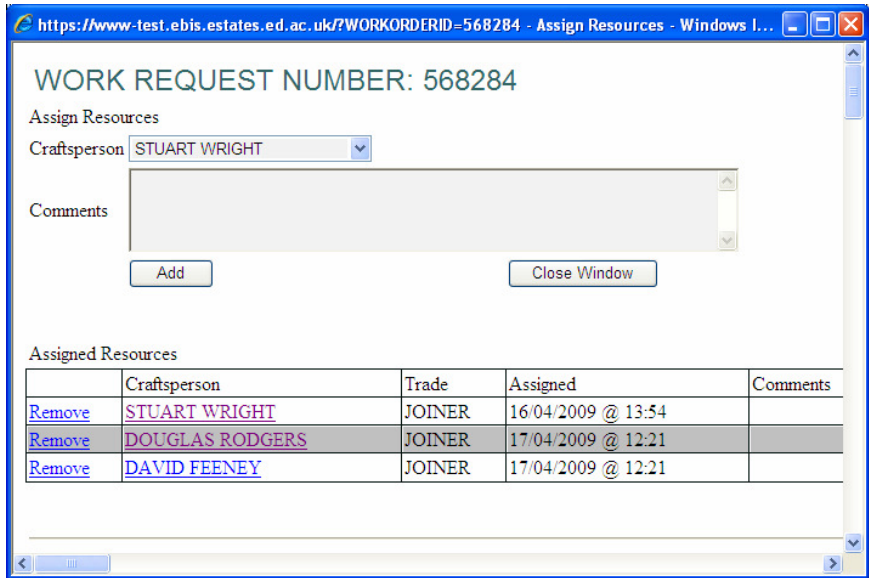
Status

Request Type

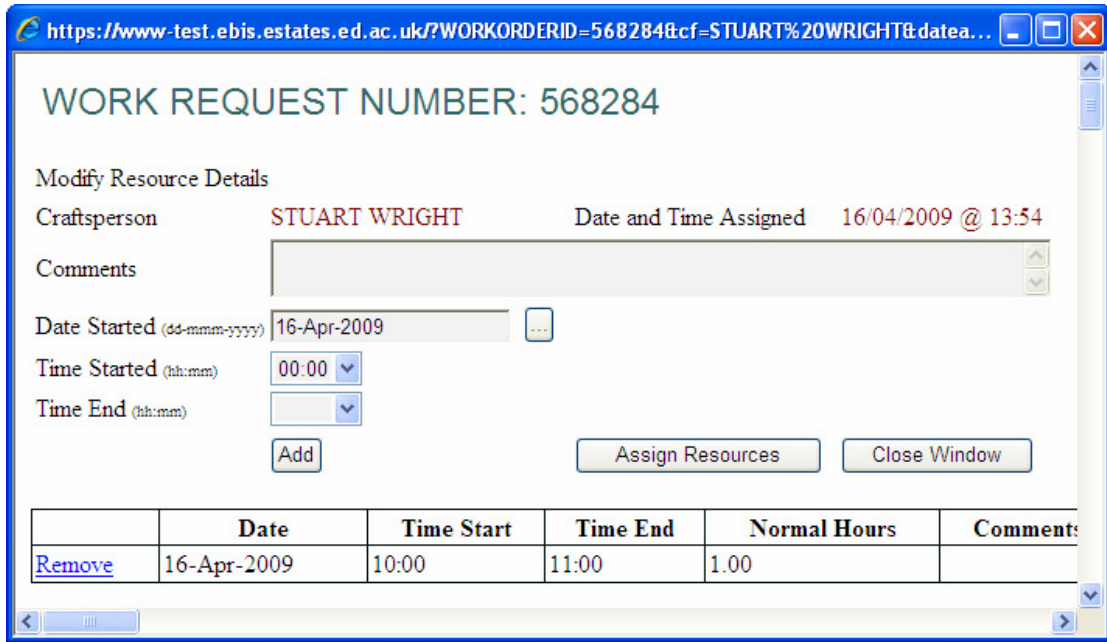
Work Order No.

Click on Assign Resources





Select Craftsperson you wish to enter time for



Enter the Date time to be entered for and the Time Started and Time End from the drop down. Click on Add. This will add in total hours worked for that day. To add time for same Work Order for different Craftsperson click on Assign Resources – this will take you back to Assign Resources screen. If no more time to be entered for Work Order click on Close Window.

All Tradespersons require to have 42.5 hours recorded against them for week. In order to check this and to submit timesheets details the Assistant Team Leaders will require to enter timesheet data into Trade Timesheet screen.

## Entering Trade Timesheet

Once all time has been entered from Work Orders Assistant Team Leaders should login to EBIS Online Timesheets to ensure that each tradesperson has the required 42.5 hours against them for that week and Commit Timesheet. This is also where time should be entered for Annual Leave, Medical Appointments etc. Time for Call Outs and Overtime should be entered through this screen.

Login to <https://www-live.ebis.estates.ed.ac.uk/ebistop.cfm> and select Timesheets | Trade Timesheets from menu bar. This will bring back the following:

### Trades Select Timesheet

Week Ending  ... Trades Person  ...



Select the Week Ending Date from the look up and the Trades Person from the look up. You can also enter part of the Trades Persons name and then click on look up box to bring back member of staff. This will open up Timesheet for selected Trades Person for committing or entering time into.

**Trades Time Sheet**

Week Ending: 07-Dec-2008 Trades Person:  ... Position: JOINER

**Time Sheet Details**

Task  Work Ord.  Trade

Day Name  Comments

**Hours**

Normal	Time & Half	Double Time	Unpaid Overtime	Time & Half	Double
<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>

	Normal	Time & Half	Double Time	Unpaid Overtime	Call Out Time & Half	Call Out Double
<b>Total for week</b>	5	0	0	0	0	0

Day	Task	Work Order No.	Hours
Wednesday	Work Order	562607	5 <a href="#">edit</a>
<b>Day Total:</b>			5

Any time which has been entered against Work Orders will show with a cumulative total for the week. If this is showing as 42.5 hours then click on Commit Timesheet to commit details for this tradesperson for the week. If the Total for week is showing less than 42.5 hours then time requires to be entered to make up to 42.5.

Select Task (if Call Out or Overtime being logged select Work Order from task list and enter Work Order Number), Day Name and then enter hours and update. Call Outs should be recorded as ???????

Once the Timesheet has been entered select Commit Timesheet. Timesheet will only Commit when correct number of hours have been entered for the Trades Persons position. If hours are incorrect this will require to be rectified before the Timesheet can be Committed. Hours should be as follows:

	All Trades
Monday	8.5
Tuesday	8.5
Wednesday	8.5
Thursday	8.5
Friday	8.5
<b>Total</b>	<b>42.5</b>

### Changing Work Order Status



In order to change Work Order Status to Job Done, On Hold for Parts etc enter the Work Order No on the Works Requests front screen and Submit.

Click on Work Order No to bring back Work Order details.



List for:					
Name	Steven Martin	Team	ACCOM	Type	Team Leader

Show Work Breakdown

Records 1 - 1 of 1

Trade	Work Order	Date - Time Requested	Date to Perform	Status	
JOINER	<a href="#">562610</a>  	10-Dec-2008 - 09:37	31-Dec-2008	Issued and in process	Lock faulty

### WORK REQUEST NUMBER: 562610

Trade	<input type="text" value="JOINER"/>	Priority	<input type="text" value="R - Routine - Low Priority - 21 Days"/>
Status	<input type="text" value="Job Done"/>	Building	<input type="text" value="801 - CHURCHILL HOUSE"/>
Job Done Date	<input type="text" value=""/> 	Last Date to Perform	<input type="text" value="31-Dec-2008"/> 
PAT Tests	<input type="text" value="0"/>	IT No.	<input type="text" value=""/>
Risk Assessment Type	<input type="text" value="Specific"/>	Description	
E & B Comments	<input type="text" value="Lock faulty on Room 1"/>		

Change Status to required status from drop down. If setting to Job Done select Job Done Date from look up to calendar.

If Status is set to On Hold for Parts, On Hold for Access etc comments should be entered in the E & B Comments field.

If job cannot be done by Trades and requires to be Passed to Premises Team the Trade should be changed on the Work Order to Premises Team and the Status changed to Assigned to Premises Team with comments entered in E & B Comments field as to why work cannot be carried out by Trades.