Estates and Buildings Information System

User Guide

ARCHIBUS/FM V17

Fault Reporting through the Web and Obtaining Fault Reports

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

Through Internet Explorer you can go into EBIS Online through:

http://www.ebis.estates.ed.ac.uk/ this will take you to the EBIS Home Page where you should click on Fault Reporting then Log a Repair which will bring back login screen

or

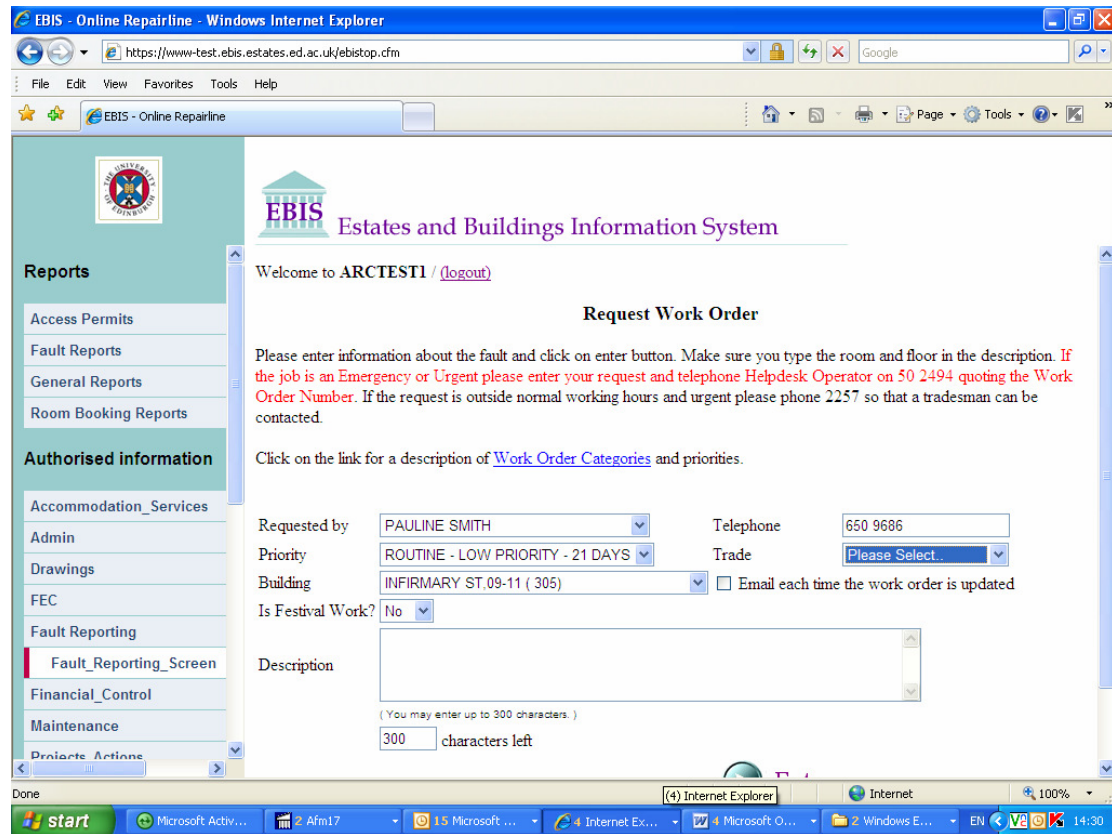https://www-live.ebis.estates.ed.ac.uk this will take you direct to the EBIS Online login screen

Add the login page to your favourites so that you do not have to keep typing in url. Page will be displayed as EBIS – Online Repairline under your favourites next time you go into Internet Explorer.

Details on how to become a Fault Reporting Representative and to obtain a User Name and Password for accessing EBIS Online can be found at the following url http://www.estates.ed.ac.uk/FaultReport/authorisation.html

How to enter a Fault Report

Once you have logged in to EBIS Online options will appear under authorised information on menu bar to left of screen. This will show all areas to which you have been granted access. To enter a Fault click on Fault Reporting then Fault Reporting :

This will bring back Request Work Order screen where you should enter the fault details. All fields require to be completed within the Request Work Order screen.

Requested By

The Requested By field should already be completed with your name from your login details
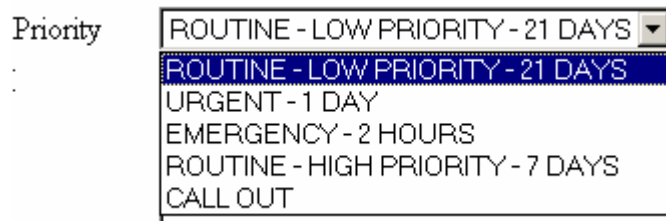

Telephone

This should automatically fill in from your login details but if EBIS do not hold this information you should enter your internal extension no so that you can be contacted in the event of any queries.

Priority

The priority currently defaults to **'Routine- Low Priority – 21 Days'** to change this click on the down arrow with your mouse to pull back a list of job priorities, select the job priority – Routine – High Priority – 7 Days, Urgent, Emergency**.**

For any jobs marked as Urgent or Emergency a Work Order No should be obtained and called through to the Helpdesk Operator on 650 2494 who will then report this to the appropriate trade. Outwith office hours Security should be contacted in the normal way who in turn will raise a Work Request through EBIS Online.
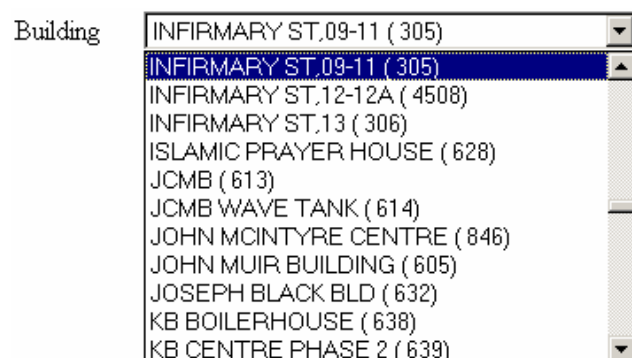

Call Out Priority should only be used by Security when reporting jobs outwith office hours.

A description of each Work Order Category and what Priority should be selected can be found through the link Work Order Categories on the Work Order Screen. This will advise on what sort of repair should be classed within each priority.
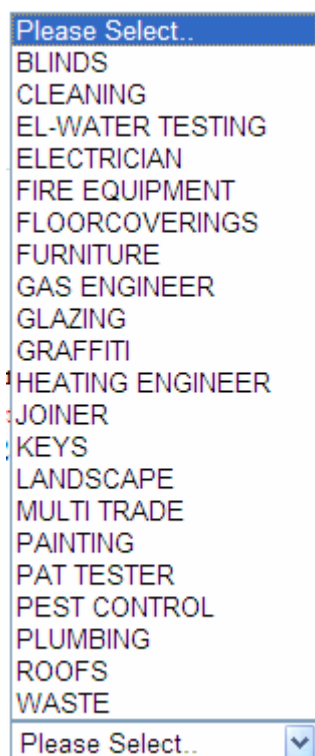
Building

Click on the down arrow to pull back all University properties listed in alphabetical order. To find the Building Name that you wish to report your defect against, press the first letter it begins with e.g. to select Infirmary Street press I then use your mouse or up and down arrows to scroll through the list. Displayed beside the Building Name you should also see the Building code in brackets. The Building currently defaults to the building which is set up against users within our employee table

Trade

The trade currently defaults to Electrician, to select a different trade, click on the down arrow to select the required trade from the list below: -

Multi Trade should only be used if user is unsure of the trade their request should go to.

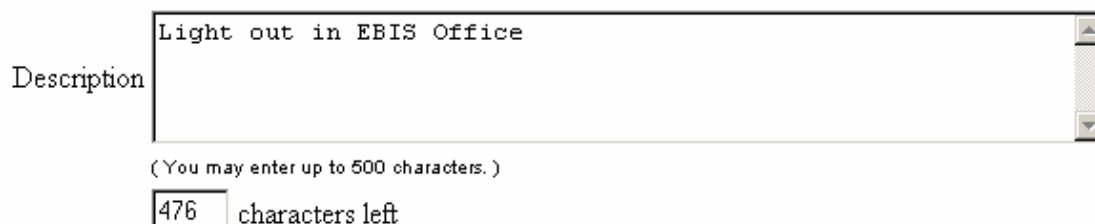**Email When Work Updated**

If you require an email to be sent to yourself any time the Work Order is updated tick box

Problem Description

Enter the fault you wish to report stating as much information as possible including the room number, floor level and if there are any access problems. Please note that the user can only enter a maximum of 500 characters in this box. A count box is under the Description field which tells you how many characters you have left to put in.

If you are happy that all the details have been against your request click on the **Enter** button to initiate the request. **Please note that once the Enter button has been clicked, no alterations can be made on line, you should contact the Helpdesk Operator on 502494 to get the details of a job amended.**

Work Order Confirmation Details

Confirmation of request details will be displayed on screen, and it is recommended that this be printed for future reference. This confirmation contains all the relevant details of your request, including a Work Order Number. This is system generated and provides a reference to the Work Order.

Welcome to **ARCTEST1** / (logout)

Work Order Number: 809998

Your request has been entered for processing with the following details:

Requested by	**PAULINE SMITH**
Telephone	**650 9686**
Priority	**ROUTINE - LOW PRIORITY - 21 DAYS**
Building	**INFIRMARY ST,09-11**
Trade	**ELECTRICIAN**
Date Created	**07/03/2012**
Problem	**Light out in EBIS Office**

Return to Previous Screen

Your request for work to be carried out within your department is now in the EBIS System and will be picked up when Work Orders are printed on a twice daily basis.

To raise another Work Order click on Return to Previous Screen which will take you back to main screen. If the Back Button is used this can sometimes generate a new Work Order No so should be avoided.

Request Work Order

Please enter information about the fault and click on enter button. Make sure you type the room and floor in the description. If the job is an Emergency or Urgent please enter your request and telephone Helpdesk Operator on 50 2494 quoting the Work Order Number. If the request is outside normal working hours and urgent please phone 2257 so that a tradesman can be contacted.

Click on the link for a description of Work Order Categories and priorities.

Requested by	PAULINE SMITH	Telephone	650 9686
Priority	ROUTINE - LOW PRIORITY - 21 DAYS	Trade	ELECTRICIAN
Building	INFIRMARY ST,09-11 (305)	☑ Email each time the work order is updated	
Is Festival Work?	No		

Description   Light out in EBIS Office

(You may enter up to 300 characters.)

276   characters left

Enter

The main screen holds your previous request details which you can now change to enter a new Work Order.

Amendments to Work Orders

Please not that changes to requests cannot be made online after they have been submitted. All changes to Work Order details should be communicated to the Helpdesk Operator on 502494 as soon as possible quoting the Work Order Number for ease of reference.

Departmental Requests for New Items

Please note that Departments' requesting 'new' items should continue the normal practice of writing to the Depute Director of Works Division. The WEB reporting facility should only be used for reporting repairs and defects.

Work Order Status

A Work Order can have the following status assigned to it: -

Issued and In Process :	WEB request has been issued to tradesman to carry out the work.
On Hold for Parts :	Materials required to carry out the request are not in stock; therefore your job has been put on hold in the meantime.
On Hold for Access :	The tradesman had a problem accessing the Room/Building to carry out the repair; therefore the job has been put on hold until he can arrange a suitable time.
Job Done :	Job has been completed by the tradesman
Rejected :	Job has been cancelled.
Assigned to Premises Team:	Trade which was originally selected cannot carry out the work requested so they have passed onto Premises Team for action
Passed to Contractor:	Contract Order has been raised to outside Contractor to carry out requested work.

Fault Reporting Reports

Work orders can be viewed by the following search criteria to check the progress of jobs reported by departmental staff.

Fault Reports
Building
Date_Range
Multiple_Criteria
Trade
WO Requestor
Work_Order

By Building

Work Orders by Building Report

Please choose a building, job status and job type. Then click on the enter button

Building: AA HOSP, ADMIN (2400)

Job status
- ◉ Incomplete
- ◯ Complete
- ◯ Any status

Job type
- ◉ Breakdown
- ◯ PPM
- ◯ All types

The User can view jobs they have reported by selecting their desired building from the drop down list. By pressing the first letter of the Building Name the User can scroll down until they find the correct building. This screen report will list jobs reported by various staff for various trades.

The Job Status defaults to 'Incomplete' and the Job Type defaults to 'Breakdown'. To change search the User can specify the Job Status and Job Type they wish to search on by clicking with the mouse on the appropriate radio buttons.

Then Click on the Enter button.

If there are records returned the number of records will be displayed. By Clicking on the Work Order number, which is highlighted in blue, the User can 'hone in' and view all the details against the Work Order.

Click on the Return To Search Screen button to take you back to the previous page.

By Date Range

Work Orders by Date Report

Please enter the date requested, job status and type of job. Then click on the enter button

From: 07/03/2012

To: 07/03/2012

Job status
- ⦿ Incomplete
- ○ Complete
- ○ Any status

Job type
- ⦿ Breakdown
- ○ PPM
- ○ All types

This option prompts the User to enter a "from date" and "to date" to locate Work Orders requested within a specific date range for all trades and all buildings within the University campus.

Dates should be entered in the format dd/mm/yyyy

The Job Status defaults to 'Incomplete' and the Job Type defaults to 'Breakdown'. To change search the User can specify the Job Status and Job Type they wish to search on by clicking with the mouse on the appropriate radio buttons.

If there are records returned the number of records will be displayed. By Clicking on the Work Order number, which is highlighted in blue, the User can 'hone in' and view all the details against the Work Order.

Click on the Return To Search Screen button to take you back to the previous page.

By Multiple Criteria

Work Orders by Multiple Criteria Search

Please enter your criteria, then click on Enter

Works Zone: ANY ZONE
Building: ANY BUILDING
College: ANY COLLEGE
School: ANY SCHOOL
Subject Area: ANY SUBJECT AREA
Trade: ANY TRADE
Supervisor: ANY SUPERVISOR
Requestor: ANYBODY
Request Mode: ANY MODE
From: 01/01/2000
To: 07/03/2012
Work Order Number:
Work Order Description:

Job Type:
- ⦿ Breakdown
- ○ PPM - Equipment
- ○ PPM - Housekeeping
- ○ All types

Job Status:
- ⦿ Incomplete
- ○ Complete
- ○ Overdue
- ○ Any status

Use Specific Status List:
- ⦿ No
- ○ Yes

Specific Status: ANY STATUS

Clear Screen   Enter

This screen gives the User the ability to specify as much information as possible thus quickening their search for jobs that they have reported.

All the fields do not have to be selected; the User can specify which fields they want to search on. When the user is happy that all the details have been selected click on the Enter button.

If there are records returned the number of records will be displayed. By Clicking on the Work Order number, which is highlighted in blue, the User can 'hone in' and view all the details against the Work Order.

Click on the Return To Search Screen button to take you back to the previous page.

By Trade

Work Orders by Trade Report

Please choose the trade, job status and type of job. Then click on the enter button

Trade: ADMINISTRATION

Job status
- Incomplete
- Complete
- Any status

Job type
- Breakdown
- PPM
- All types

This screen allows the User to select a trade from the drop down list by clicking on the down arrow with the mouse. After selecting their desired Trade a list will be displayed of all jobs for the trade selected for all buildings within the University Campus.

The Job Status defaults to 'Incomplete' and the Job Type defaults to 'Breakdown'. To change search the User can specify the Job Status and Job Type they wish to search on by clicking with the mouse on the appropriate radio buttons.

Then Click on the Enter button.

If there are records returned the number of records will be displayed. By Clicking on the Work Order number, which is highlighted in blue, the User can 'hone in' and view all the details against the Work Order.

Click on the Return To Search Screen button to take you back to the previous page.

By Requested By

Work Orders by Requestor Report

Please choose the requestor, job status and type of job. Then click on the enter button

Requested by: A GRAHAM WALKER

Job status
- Incomplete
- Complete
- Any status

Job type
- Breakdown
- PPM
- All types

This facility allows the user to look up jobs requested by an individual. This report can be used to check all jobs requested by yourself, simply select your name from the drop down list.

The Job Status defaults to 'Incomplete' and the Job Type defaults to 'Breakdown'. To change search the User can specify the Job Status and Job Type they wish to search on by clicking with the mouse on the appropriate radio buttons.

If there are records returned the number of records will be displayed. By Clicking on the Work Order number, which is highlighted in blue, the User can 'hone in' and view all the details against the Work Order.

Click on the Return To Search Screen button to take you back to the previous page.

By Work Order Number

Work Order Report

Please enter a valid work order number and then click on the enter button

Work Order Number: [   ]

Enter the Work Order Number from your confirmation print then click on the Enter button. This will then bring back details on the Work Order