



Estates and Buildings Information System

User Guide

ARCHIBUS/FM V17

Setting up Equipment and PPM Equipment Schedules

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.

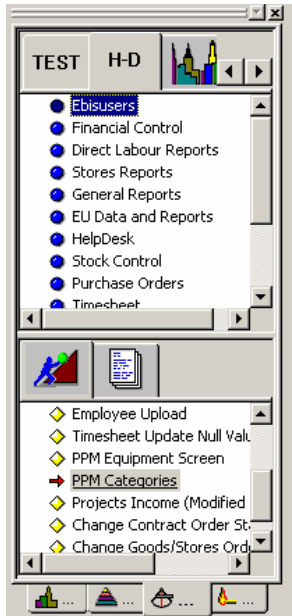
In Project double click on  to open up Project

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.

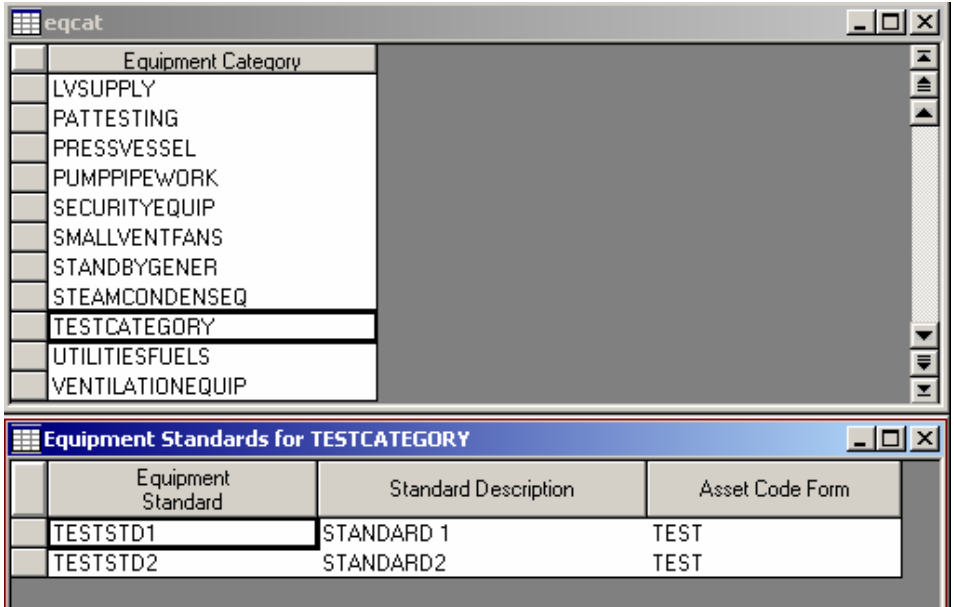
Setting up Equipment

Before setting up Equipment the first thing you need to do is ensure there is an Equipment Category set up for the Equipment you are setting up. To check the Equipment Category open PPM Categories table.

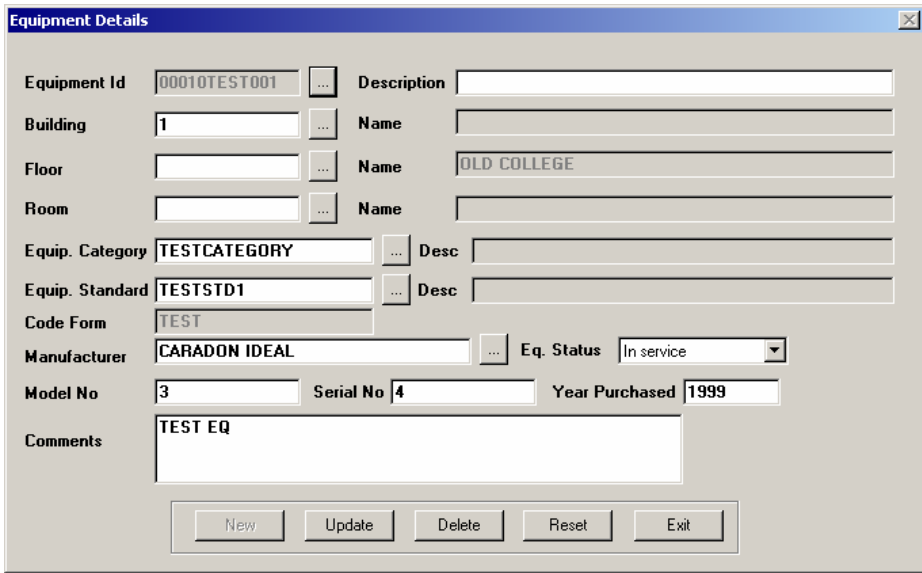


If the Equipment Category does not exist you will need to Create one. In PPM Categories ensure eqcat table is selected, click Insert and type in new Equipment Category. Right Click and Save Record.

Ensure the Equipment Category you want to set up the Equipment Standards for is selected. Click into Equipment Standard box and ensure Equipment Standard, Standard Description and Asset Code Form (up to 5 characters). To enter another Equipment Standard click Insert and enter details



Once all your Equipment Categories/Standards are set up you now want to set up your Equipment Details. Open PPM Equipment screen. Click New and enter all details for your piece of Equipment onto screen. Once all details have been entered click Update. This will automatically generate an Equipment ID which is made up of 4 digit Building Code, 5 digit Asset Code Form (if Asset Code Form was set up for less than 5 digits zeros are put in front of this to make up to 5 digits) and the next available Unique No for that Building and Equipment Standard.



Setting up PPM Equipment Schedule

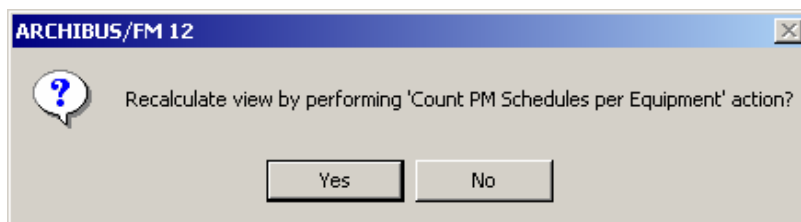
Firstly you need to Create PPM Procedure. Open Create Procedures & Steps and insert on PM Procedures Table

PM Procedures						
PM Procedure	PM Procedure Description	Primary Trade	Procedure Type	Account Code	History Log Type	
WD0001	NO LOG	ELECTRICIAN	Equipment		None	
WD0002	FUME	ELECTRICIAN	Equipment		Fume Cupboards	
WD0003	MANDATORY	ELECTRICIAN	Equipment		Mandatory Statutory Inspe	
WD0004	LEGIONELLA	ELECTRICIAN	Equipment		Legionella Tests	

PM Procedures' Steps for WD0002	
PM Step Code	Instructions
1	PLEASE REFER TO INSTRUCTIONS FOR FUME

Insert all Fields on PM Procedures table ensuring History Log Type is selected and Procedure Type is Equipment. Click on PM Procedures Steps table to select this table to work on. Enter your PM Step Code of 1 (each Procedure should only be set up with 1 Step) and then double click on Instructions field to enter your instructions into the Memo Editor.

You are now ready to Create Equipment PM Schedules for these Procedures. When you open this task from the tool bar the following message will appear to which you should always say 'No'.



Select the Equipment Code to want to set up the Schedule for.

Equipment							
Equipment Code	School	Equipment Standard	Equipment Category	Standard Description	Equipment Use	Building Code	
00080HEAT001		FANCOILUNIT	HEATEMITTER	FAN COIL UNITS (HEAT ONLY)		8	

PM Schedules for 00080HEAT001									
PM Schedule Code	PM Procedure	PM Procedure Description	Date for First PM	Current Frequency	Freq. 1 Interval	Task Priority	Interval Type	Fixed or Floating	
18509 251Q		FAN COIL UNITS - HEATING ONLY	21/04/2005	1	3		3 Months	Fixed	
18510 251B		FAN COIL UNITS - HEATING ONLY	21/04/2005	1	6		2 Months	Fixed	
18511 251A		FAN COIL UNITS - HEATING ONLY	21/04/2005	1	12		1 Months	Fixed	

In PM Schedules enter details required. The PM Schedule Code and Procedure Description will generate automatically once all details are entered. In PM Procedure enter the PM Procedure Code or double click in the field and select PM Procedure from list. The date of the First PM should be entered as the date you want the first schedule to come out – always set up for 1st of Month. Date for First PM should be the same for all procedures relating to that piece of equipment. Freq 1 Interval is how often you want the schedule to come out i.e. for monthly card Freq 1 Interval will be 1 as you want this to come out Monthly and for quarterly card Freq 1

Interval will be 3 as you want this to come out every 3 months. In order for the quarterly card to overwrite the monthly card or the annual card to overwrite the monthly and the quarterly cards the task priority should be set to show the priority you want the card to come out. Annually will be set to Task Priority 1 as you want this to generate every 12 months but the quarterly card (task priority should be set as 2) and monthly card (task priority should be set as 3) not come out at this time. The Interval Type is the period you want the schedule to come out i.e. days, weeks, months etc. **Fixed should always be selected under Fixed or Floating field.**

Note: Date Fields automatically show on table as todays date is field in clicked on. This will only hold if the field is double clicked.