



Estates and Buildings Information System

User Guide

ARCHIBUS/FM V17

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.

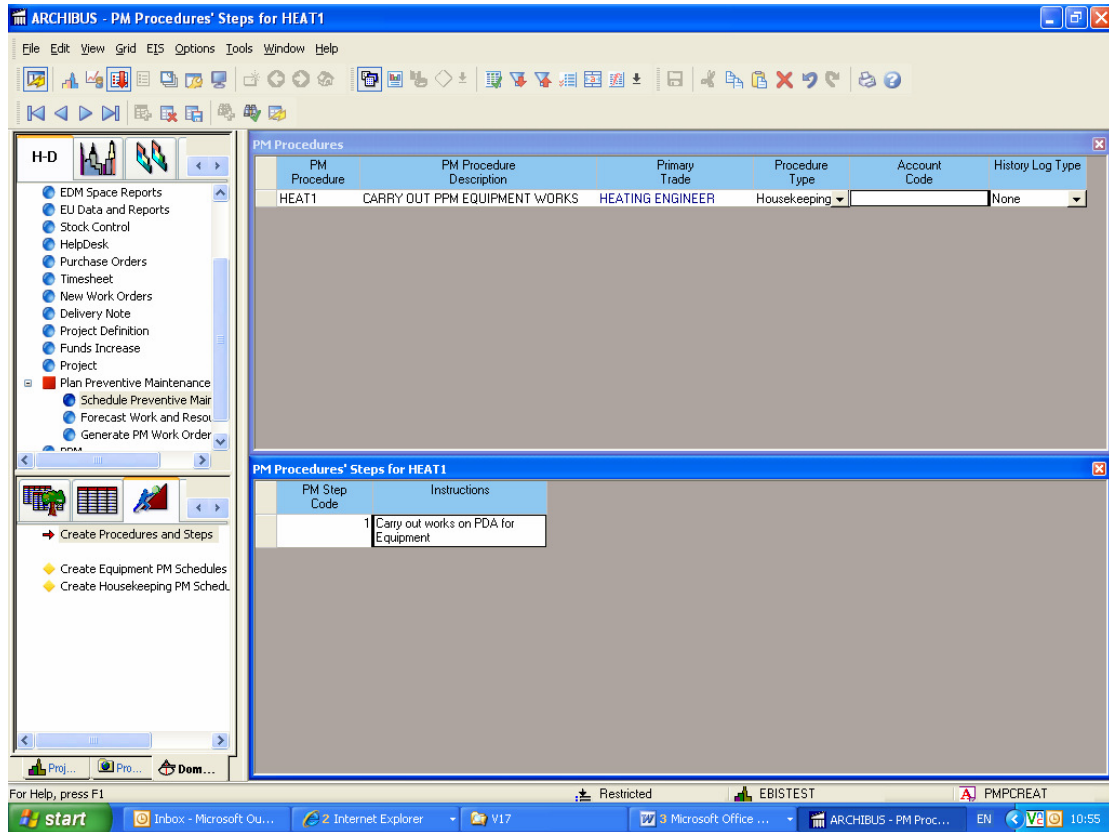
In Project double click on  to open up Project

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 Procedures and Steps

Once you have logged into Archibus first thing you require to do is set up the Procedures and Steps for the Procedure you wish to set up. 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.

Primary Trade can be typed directly into field or double click on field to bring back list of values and select trade you wish to set Procedure up for from here.

Procedure Type should be Housekeeping

For each PM Procedure set up PM Procedures Steps must be set up. Click on PM Procedures' Steps table. 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

The Procedure you have set up now requires to be scheduled against relevant Buildings. Select Plan Preventive Maintenance | Schedule Preventive Maintenance | Create Housekeeping PM Schedules for Building Only

Building Code	Building Name
1	OLD COLLEGE

PM Schedule Code	PM Procedure	PM Procedure Description	Date for First PM	Freq 1 Interval	Interval Type	Fixed or Floating	Num. Open Work Orders	School
21000	PAT12	PAT TEST ALL ELECTRICAL EQUIP	01/06/2006	12 Months	Fixed	0	S26	
21001	PAT12	PAT TEST ALL ELECTRICAL EQUIP	01/06/2006	12 Months	Fixed	0	S27	
21007	PAT12	PAT TEST ALL ELECTRICAL EQUIP	01/08/2006	12 Months	Fixed	0	S44	
21061	PAT12	PAT TEST ALL ELECTRICAL EQUIP	01/01/2007	12 Months	Fixed	0	P70	
21076	PAT12	PAT TEST ALL ELECTRICAL EQUIP	01/01/2007	12 Months	Fixed	0	P62	
21077	PAT12	PAT TEST ALL ELECTRICAL EQUIP	01/01/2007	0 Months	Fixed	0	P54	
21080	PAT12	PAT TEST ALL ELECTRICAL EQUIP	01/07/2006	12 Months	Fixed	0	P99	
24147	KBLEG18	LEGIONELLA - BUILDING GROUP 18	13/03/2007	0 Months	Fixed	0		
24246	JF167	TIDYING UP OLD COLLEGE QUAD ON SATURDAY MORNING	16/07/2007	1 Weeks	Fixed	0		
24383	PAT06CM	PAT TEST ALL CLEANING MACHINES	08/10/2008	6 Months	Fixed	0	P62	
24398	PAT12	PAT TEST ALL ELECTRICAL EQUIP	02/10/2008	12 Months	Fixed	0	P68	
25974	E1020	CHECK TRIP BATTERIES AND CHARGER UNIT	04/06/2008	4 Months	Fixed	0		
26157	HEAT1	CARRY OUT PPM EQUIPMENT WORKS	01/04/2009	6 Months	Fixed	0		

Select Building you require to set Schedules for then click on PM Schedules table at bottom. Click insert to add a new schedule in

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.

Right Click and Save Record or tab to end of row to commit record.

Changing Date or Procedure no longer required

If a Housekeeping 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 PPM job and set the Freq 1 Interval to 0 – this will stop the Schedule from generating.

If the job is required to come out on a different date 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