



Estates and Buildings Information System

User Guide

ARCHIBUS/FM V17

Contract Order 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.

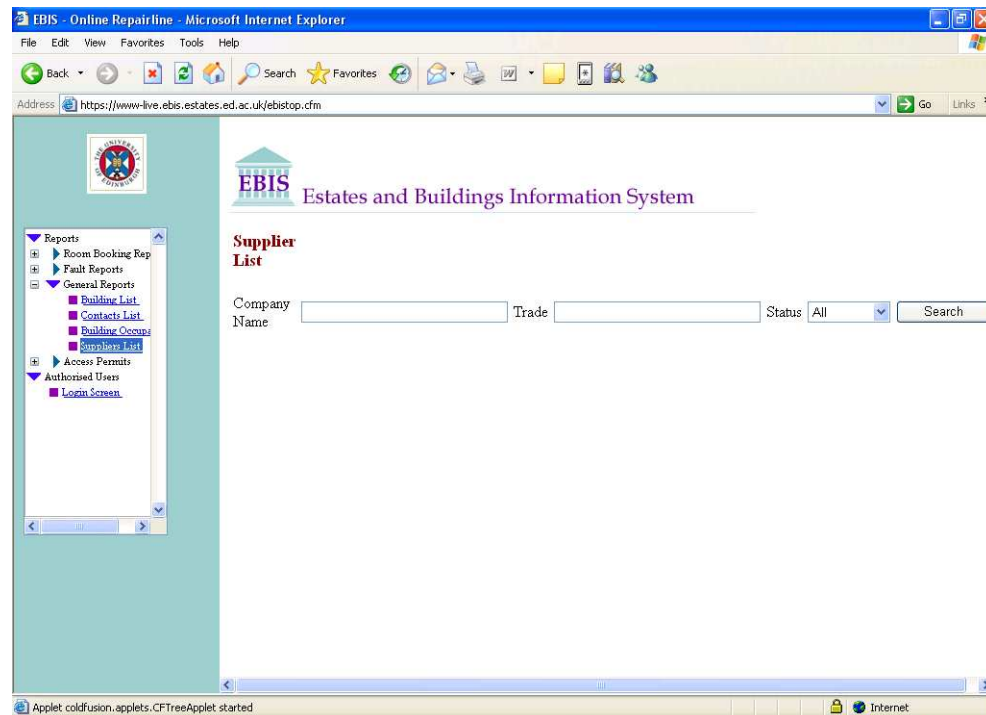
In Project double click on  to open up Project

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 New Supplier/Contractor/Consultant

If you are unsure if a Supplier/Contractor/Consultant is set up within Archibus you can check this through EBIS Online:



From this list you can search on Company you wish to add to see if they are available and to check the status of the Company. If they are Inactive you should contact Financial Control to check reason why they have been set to Inactive.

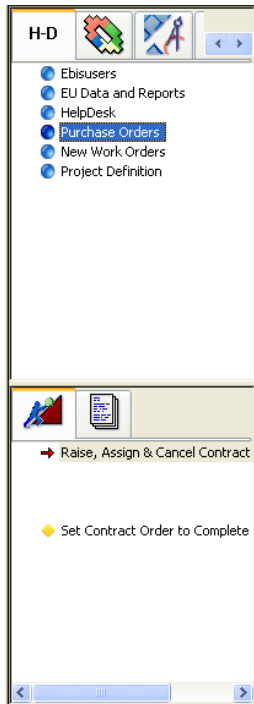
Contract Orders can only be raised to Active Vendors

If Supplier/Contractor/Consultant is not on list and therefore requires to be set up within Archibus a New Supplier/Contractor/Consultant form will require to be completed. This can be found at the following:

<http://www.ebis.estates.ed.ac.uk/admin.html> then click on Approval for New Contractor Form

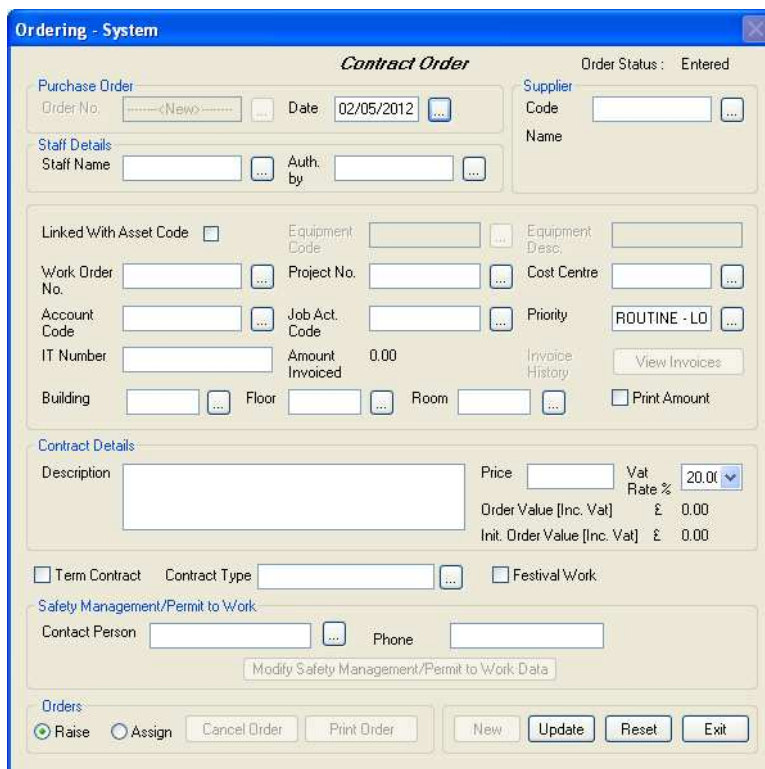
Raising Contract Order


Once you have logged into Archibus select Purchase Orders | Raise, Assign and Cancel Contract Orders



This will open up Contract Order Screen

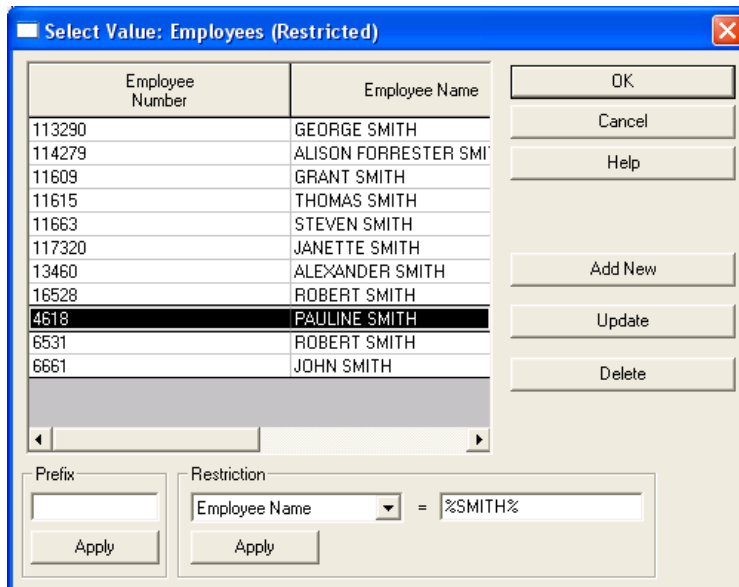
Click on New to generate a new blank Contract Order

A screenshot of the 'Contract Order' screen in the Archibus system. The window title is 'Ordering - System'. The main heading is 'Contract Order' and the 'Order Status' is 'Entered'. The screen is divided into several sections: 'Purchase Order' with fields for 'Order No.' (set to '<New>') and 'Date' (02/05/2012); 'Staff Details' with fields for 'Staff Name' and 'Auth. by'; 'Linked With Asset Code' with a checkbox; 'Equipment Code' and 'Equipment Desc.' fields; 'Work Order No.', 'Project No.', and 'Cost Centre' fields; 'Account Code', 'Job Act. Code', and 'Priority' (set to 'ROUTINE - LO') fields; 'IT Number', 'Amount Invoiced' (0.00), and 'Invoice History' fields; 'Building', 'Floor', and 'Room' fields; 'Contract Details' with a 'Description' field, 'Price' field, 'Vat Rate %' (20.00), and 'Order Value [Inc. Vat]' (£ 0.00); 'Term Contract' and 'Contract Type' fields; 'Festival Work' checkbox; 'Safety Management/Permit to Work' section with 'Contact Person' and 'Phone' fields; and a 'Modify Safety Management/Permit to Work Data' button. At the bottom, there are 'Orders' buttons: 'Raise' (selected), 'Assign', 'Cancel Order', 'Print Order', 'New', 'Update', 'Reset', and 'Exit'.

All fields with  beside have a list of values (LOVs). These fields can either be typed directly into or click on list of values for available data.

As with all LOV fields these will bring back look up boxes where you can select the value you require or search for value.

To search you can either search in Prefix field (this will search on first column) or in Restriction select the field you wish to search on and then enter partial search in blank field - % can be used as wild cards on both searches. Click Apply when you have entered your partial search to bring back all rows which match your restriction. Select value you require and click on OK. This will enter into field you are searching on.



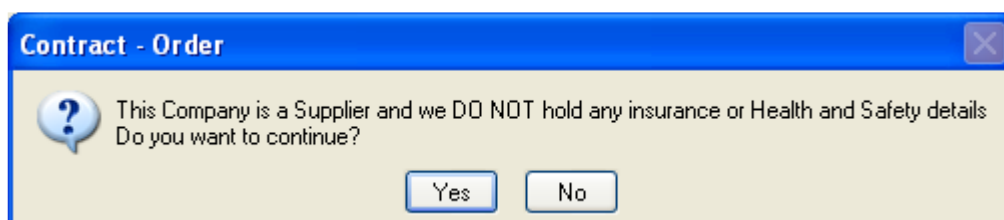
Employee Number	Employee Name
113290	GEORGE SMITH
114279	ALISON FORRESTER SMI
11609	GRANT SMITH
11615	THOMAS SMITH
11663	STEVEN SMITH
117320	JANETTE SMITH
13460	ALEXANDER SMITH
16528	ROBERT SMITH
4518	PAULINE SMITH
6531	ROBERT SMITH
6661	JOHN SMITH

Staff Name can be typed directly into box or selected from LOVs. The LOV for Staff Name restricts to only Employees within Estates & Buildings, School P62


Auth By field requires to be filled in for all work over £10K inc VAT. This should be authorised by Assistant Director, Depute Director, Building Operations Manager or Engineering Operations Manager. If order is over £10K inc VAT one of the printed copies of the order should be signed by the authoriser and kept on file for auditing purposes.

Supplier Code – this field is filled out with the Supplier ID. If you know the Supplier ID of the Company you wish to raise order to then you can type this directly in but if not then you will require to click on LOVs and search for Company Name.

If you are raising an order to a vendor set up as a Supplier within the vendor table then you will receive the following warning message:



Contract - Order

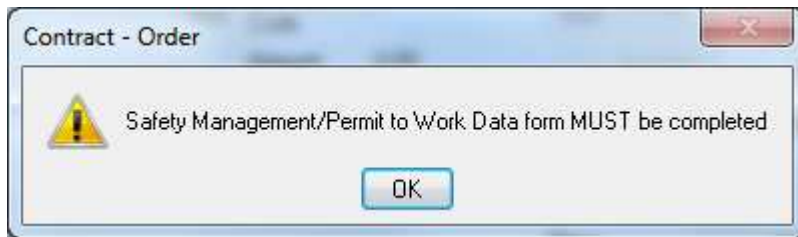
 This Company is a Supplier and we DO NOT hold any insurance or Health and Safety details
Do you want to continue?

Yes No

If the works being ordered are Contract related you should say No to this message and order will be disallowed. You should contact Financial Control in order for them to obtain the necessary Credentials..

In the case of an emergency an authorisation email from Depute Director, Assistant Director, Building Operations Manager or Engineering Operations Manager will require to be sent to Financial Control who will change the vendor type from Supplier/Consultant to Contractor to allow the order to go through and allow selection of Safety Questions. Once order has been raised Financial Control should be informed and they will change the vendor type back to Supplier/Consultant and will contact the vendor for necessary paperwork.

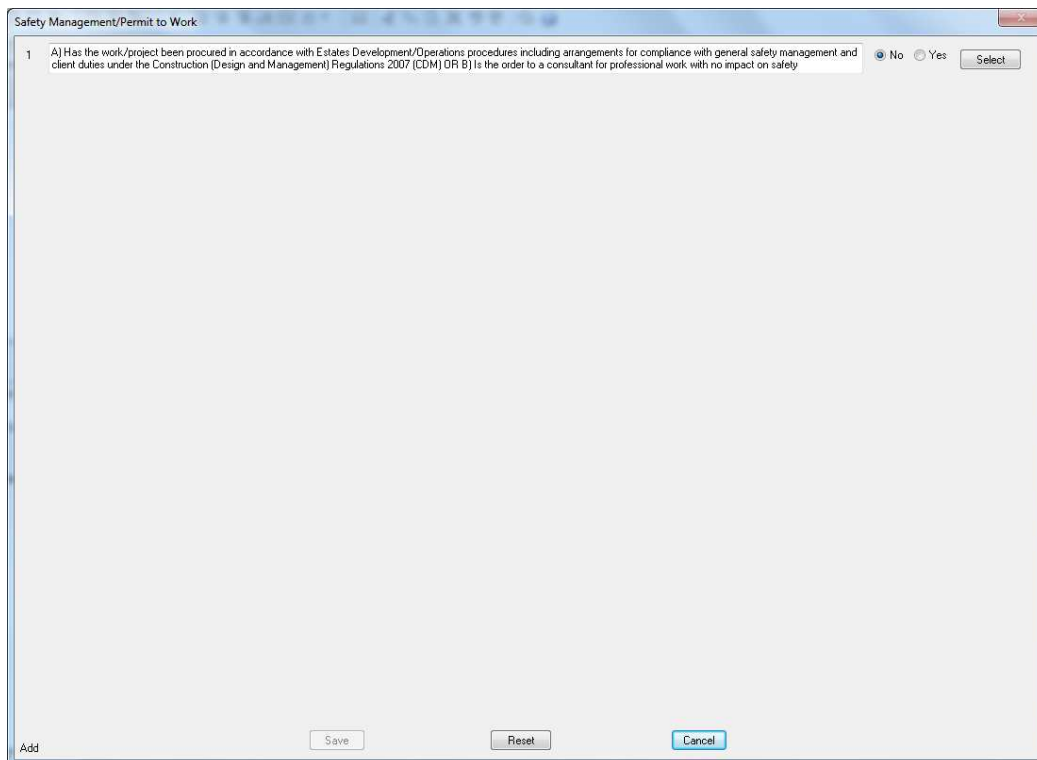
If you are raising Order to a Contractor/Consultant you will receive screen below to answer Safety Management/Permit to Work questions:



This will then allow access to the Safety Management/Permit to Work screen through the following (this requires to be completed or you will not be able to create order):



Click on this to bring back Safety Management/Permit to Work screen:



For each question you should select Yes or No and once you have completed click Save to return to Order screen. Questions are as follow:

1	A) Has the work/project been procured in accordance with Estates Development/Operations procedures including arrangements for compliance with general safety management and client duties under the Construction (Design and Management) Regulations 2007 (CDM)? OR B) Is the order to a consultant for professional work with no impact on safety?	Yes/No	If Yes no other answers required If No go to Question 2
2	Do the Construction (Design and Management) Regulations 2007 (CDM) apply, i.e. Is the work Construction Work (as defined in Regulation 2 of CDM 2007)?	Yes/No	If Yes go to Question 3 If No go to Question 6
3	Is the Project notifiable under CDM 2007?	Yes/No	If Yes go to Question 4 If No go to Question 5
4	Have arrangements been made to comply with clients duties for notifiable jobs under CDM 2007?	Yes/No	If Yes go to Question 8 If No disallow order
5	Have arrangements been made to comply with clients duties for non- notifiable jobs under CDM 2007?	YES/No	If Yes go to Question 8 If No disallow order
6	Are written suitable and sufficient risk assessment(s) and method statement(s) necessary?	Yes/No	If Yes go to Question 7 If No go to Question 8
7	Have they been received?	Yes/No	If Yes go to Question 8 If No disallow order
8	All work with the potential to alter or damage the fabric of the building or building services must be assessed with regard to the presence of Asbestos containing materials. Do you need to check the Asbestos Register?	Yes/No	Go to Question 9
9	Is an Asbestos Permit to Work (issued by the Asbestos Management Team) required?	Yes/No	Go to Question 10
10	Is a Roof Access Permit required?	Yes/No	Go to Question 11
11	Is a Laboratory Access Permit/Permit to Work (issued by the local Technical Manager/competent person) required?	Yes/No	Go to Question 12
12	Is a Hot Work Permit (issued by Premises Team) required?	Yes/No	Go to Question 13
13	Is an Electrical Limitation of Access Permit required?	Yes/No	Go to Question 14
14	Is an Electrical Permit required?	Yes/No	Go to Question 15
15	Is it necessary to sign in to this building?		

Work Order No – this field is only entered if you are raising a Contract Order against an IT. The Work Order should be filled in and this will automatically fill in the IT Number field with the Internal Transfer No from the Work Order.

Project ID – can be typed direct into field or selected from LOVs

Cost Centre – restricts to Cost Centres available against selected Project ID

Account Code – restricts to Account Codes available against selected Project ID and Cost Centre

Job Act. Code – restricts to Job Activity Codes available against selected Project ID, Cost Centre and Account Code

Priority – Call Out, Cyclic, Emergency – 2 hours, Routine – Low Priority 21 Days,

Routine – High Priority 7 Days or Urgent – 1 Day

IT Number – will automatically fill out if Work Order entered or enter IT Number directly into field

Building Code – can be typed direct into field or selected from LOVs

Print Amount – Check this box if you want the price to print on the order. Generally this is left unchecked as the price on most orders is an estimate therefore should not be printed

Description – Free text to enter description of works required. No need to press carriage return for a new line as text wraps automatically

Price – Type in amount excluding VAT

Term Contract – Check this box if Term Contract

Festival Work – Check this box if works requested relate to Festival Works

Contract Type – Select contract type from LOVs

VAT Rate – Can be set to 0%, 5%, 15%, 17.5% or 20% default is 20%

Order value (inc VAT) will automatically calculate on screen once Price is entered

Contact Person – Person who Contractor should contact if any queries re Order

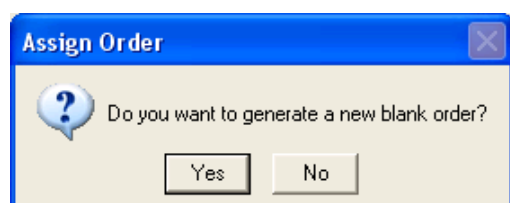
Phone – Phone number of Contact Person – this will automatically display if we hold Phone number for Contact Person within the Employee Table

Assign a Contract Order

This option is used for emergency work where there is no time to issue a full order or where a Company requests an order number before they undertake any work.

Open Purchase Orders | Raise, Assign and Cancel Contract Orders

Click on Assign at left hand bottom of Order Screen. This will give you following message:



Click on Yes, this will now allow Order to be Assigned.

The following fields can be completed:

Staff Name – should be entered

Authorised By – does not have to be entered

Supplier Name – should be entered (you will be given Safety Management/Permit to Work Questions if Vendor you select is a Contractor/Consultant)

Building – does not have to be entered

Contract Description – does not have to be entered

Click Update to generate Order No then Print to print order with calling card and permit if order is being assigned for a Contractor.

When you are ready to enter the rest of the details for the order open Raise, Assign and Cancel Contract Orders and then type Order No in Order Number field and tab. This will bring back details which have been entered and allow other fields to be completed.

Term Contracts

If you are required to raise a Term Contract order, in the Purchase Order screen select the Term Contract box then select the type from the drop down list. Once Order has been updated open EBIS Online.

When logged in select Purchase Orders from the left hand menu and then Term Contracts from the drop down list.



Enter the Order Number in the Order Id field then select the relevant e-mail address from drop down menu and click 'Send E-Mail'. The following message will appear on screen:-



Send Order Closed Emails to QS should be run on a daily basis. This will send email to QS for Orders which have had a Final Invoice entered against them since last email was sent.

The following message will appear on screen:-



This will automatically send an email to inform QS of Closed Orders.

Cancelling Term Contract Orders

If you wish to cancel a term contract order (providing no invoices have been paid yet) open up the Raise/Assign order screen then enter the PO number this will pull back all the details of the order on screen. Click on Cancel Order this will set the order status to terminated.

Terminated Term Contract Orders Report

At the end of each month a check should be run to ensure that where an order has been terminated the QS will receive a note about this.

This report looks to where an initial email has been sent to the QS and where the order status is terminated.

To run this report go to:-

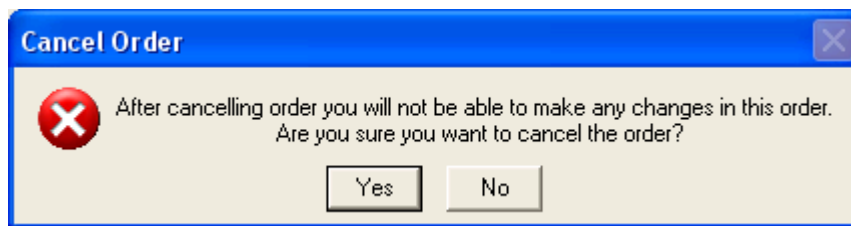
Helpdesk | Purchase Orders | Reports tab

Click on Cancelled Term Orders

Where an order has been cancelled this will appear on this report which should be relayed to the QS.

labelling="Section-Header">Cancelling Contract Orders****

If you wish to Cancel a Contract Order open up Raise, Assign and Cancel Contract Order and then type Order No in Order field and tab. This will bring back details of the order which can only be cancelled if there are no invoices against. To cancel click on Cancel Order button which will give following message:



Click Yes if you are sure you want to cancel, this will set Order Status to Terminated.

Increasing Amount on Order

When Financial Control log invoices against an Order No if there is not enough money on the order to pass the Invoices the Invoice will be rejected and Order Status will show as Invoice (H).

In order to see how much you require to increase the Order by to process the Invoice enter the Order No then click on the View Invoices button. This will bring back Invoice History screen

INVOICE ID	Invoice Date	Amount X Vat	Vat	Amount	Status	Final
160206	16/02/2006	150	26.25	176.25	Rejected	N

Credit Note Details

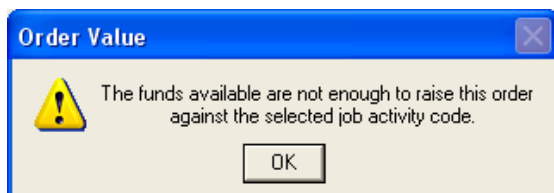
Totals

Order Amount	117.50
Invoice X Vat	150.00
Vat Amount	26.25
Invoice Total	176.25
Credits Total	0.00

Difference 58.75 Order VAT% : 17.5 Increase Order By : 50

You can then increase the price field by the Increase Order By amount from the Invoice History screen.

If there are insufficient funds against the Project to increase the order amount the following message will be displayed:

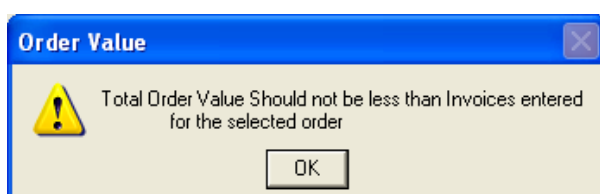


In this instance the Invoice should be passed back to the Order Originator informing them that there is not enough funds to increase their order.

Decreasing Amount on Order

If you wish to decrease the amount against a Contract Order to release funds to raise another Order against that Project open the Contract Order within Archibus and change the price field to show new value.

This can be done if the Contract Order is at any other status apart from Complete. If there are any Invoices logged against the Order the Order Value cannot be changed to less than the value of the Invoices. If you try to change the price to less than the Amount Invoiced the following message will appear:



Setting Order to Complete to Release Funds

If an Order has been completed but no Final Invoice has been entered the Order should be set to Complete using the Set Contract Order to Complete to release funds selection:



Enter the Order No and OK. This will set the Order to complete and release any unused funds back to the Project.

Order Status

A Contract Order can have 6 different Status which are:

Entered	Order has been raised but no actions against
Printed	Order has been printed but no invoices against
Confirmed	Order has an Invoice logged against it but no Final
Invoice (H)	Order has a Rejected Invoice logged i.e. there is not enough money against the order to cover the amount of the Invoice
Held	Order has been Assigned but no detail entered against it
Complete	Final Invoice has been entered and paid against order
Terminated	Order has been cancelled and can no longer be used