



Estates and Buildings Information System

# *User Guide*

*ARCHIBUS/FM V17*

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# *Invoice/Credit Note Batch Scanning*

## 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

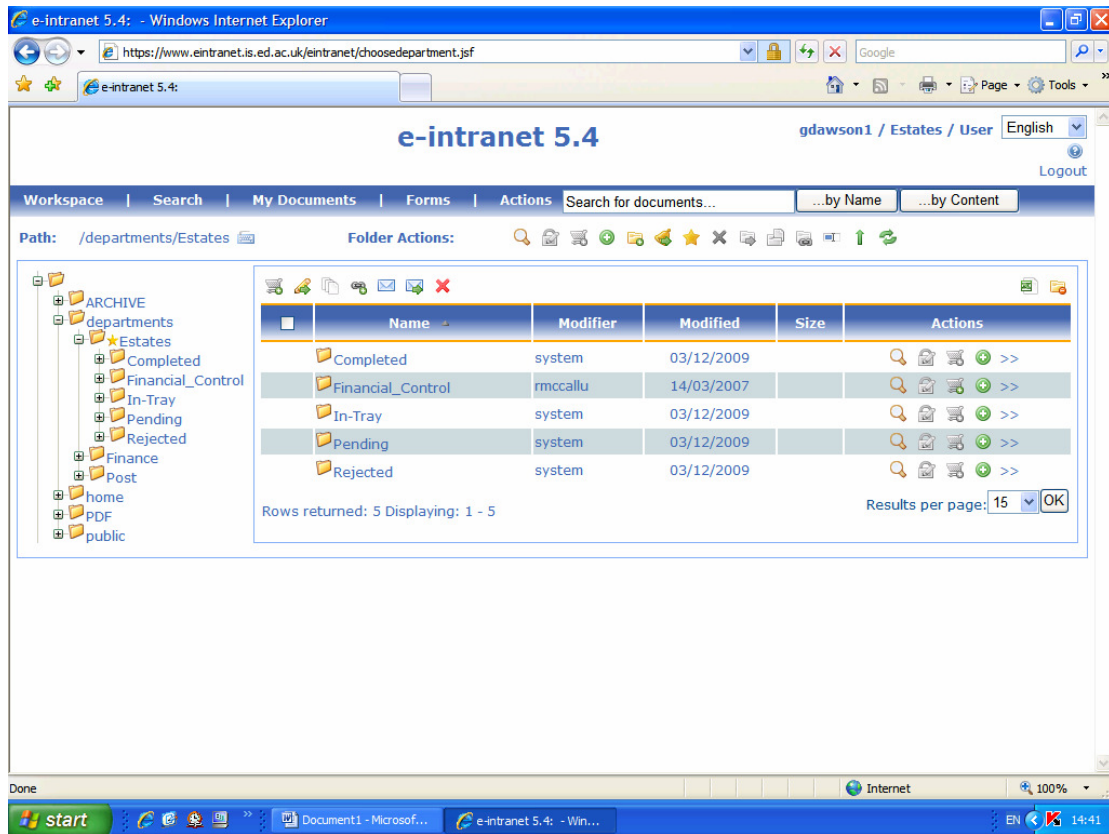
Enter User Name and Password – which are supplied by Ebisusers – then click OK

This will now open up the Archibus/FM Navigator showing all modules/groups you have access to.

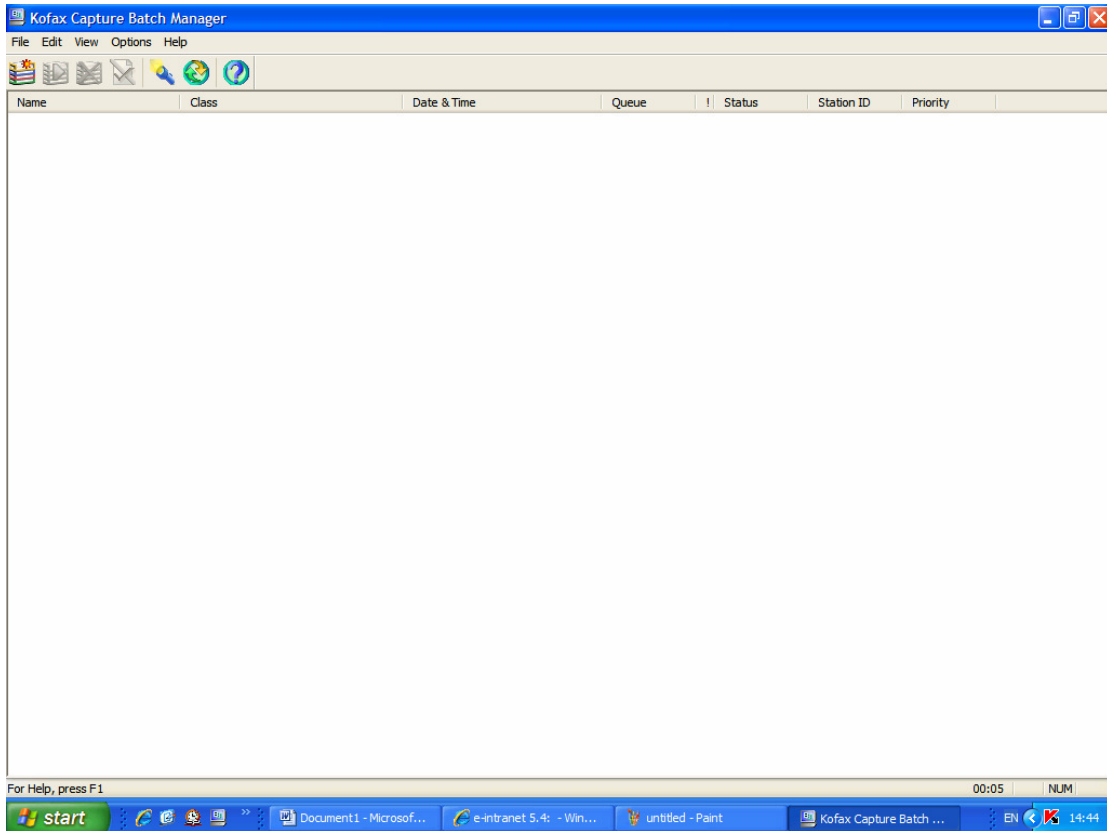
Before you start scanning process ensure that all staples etc are removed from documents as this will cause scanner to

Login to e-intranet 5.4 using MyEd user name and password

<https://www.eintranet.is.ed.ac.uk/eintranet/ssoLogin.jsf>

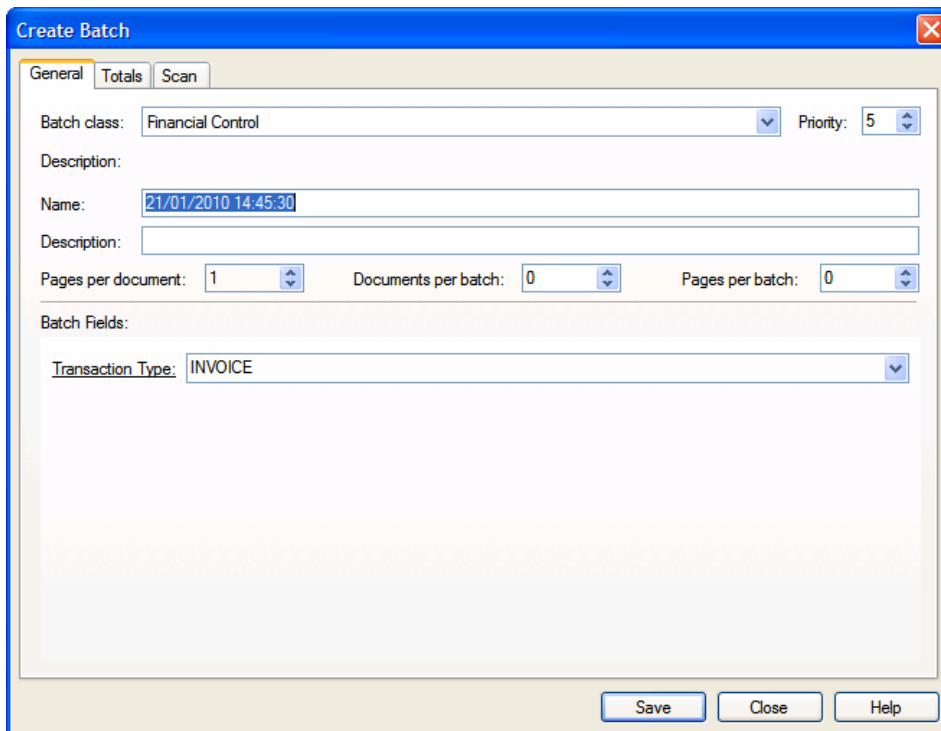


Minimize e-intranet and open Batch Manager  from screen

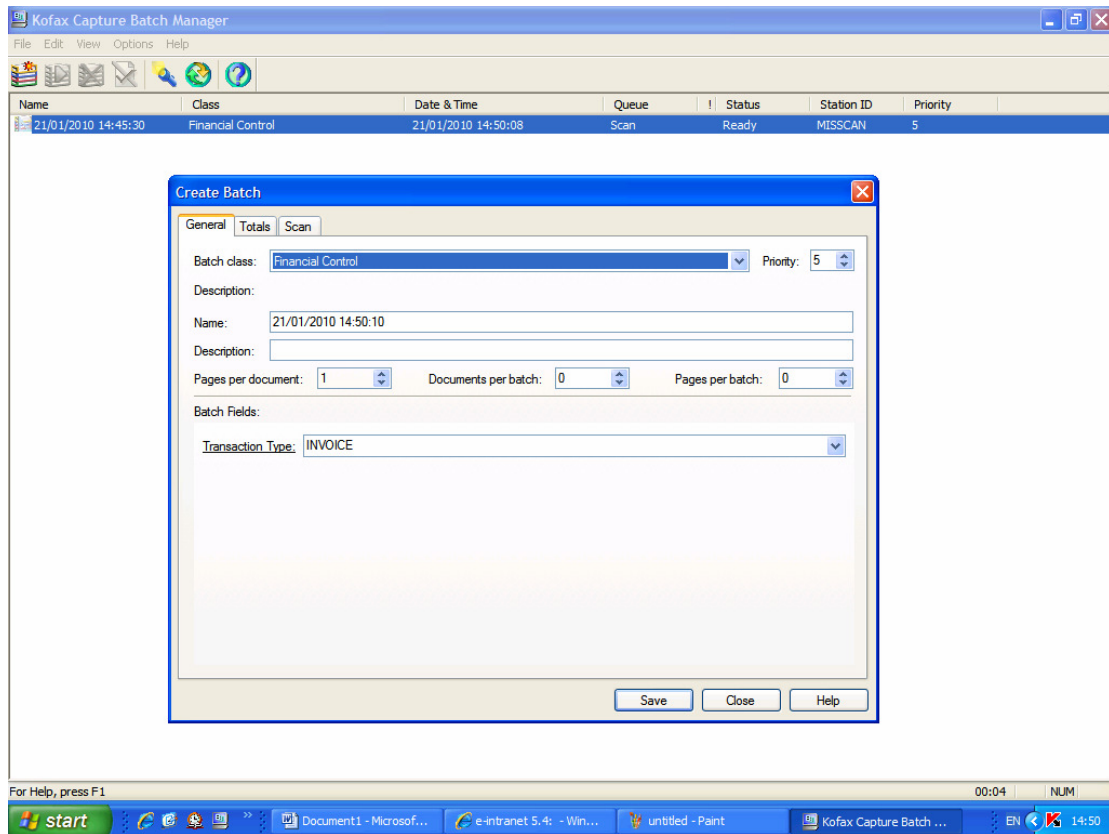


You are now ready to scan invoices/credits etc

Click File | New Batch to Create Batch

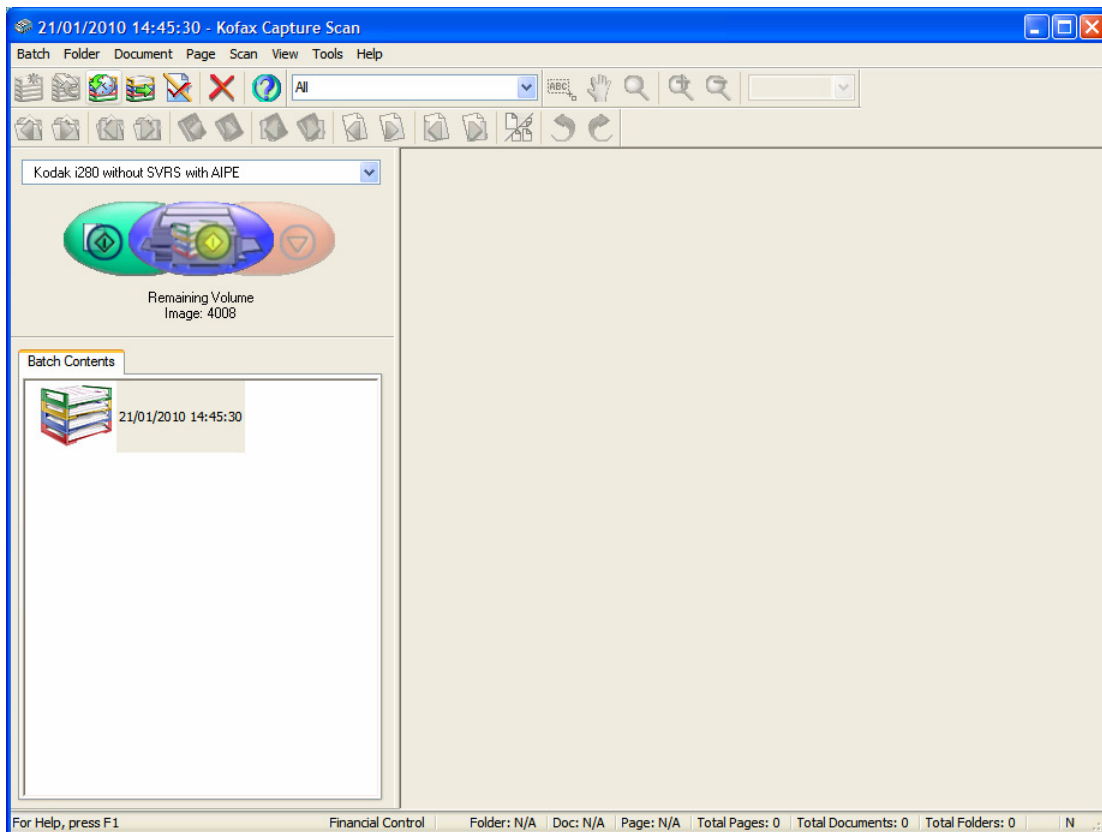


Set Pages per document to maximum number of pages on one single invoice/credit which you are scanning and set Transaction Type to INVOICE or CREDIT. Once completed click Save

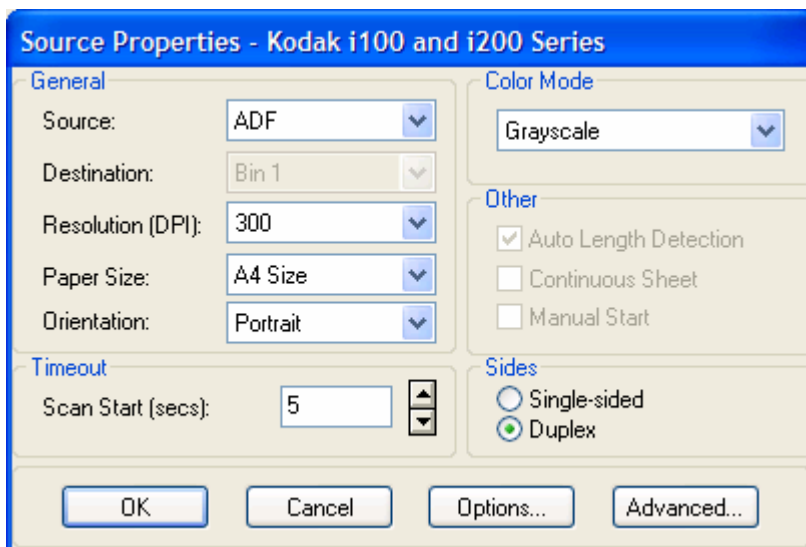


Click Close on Create Batch


Insert Invoices/Credits into scanner, on Batch Manager select File | Process Batch or click on Process Batch icon  .



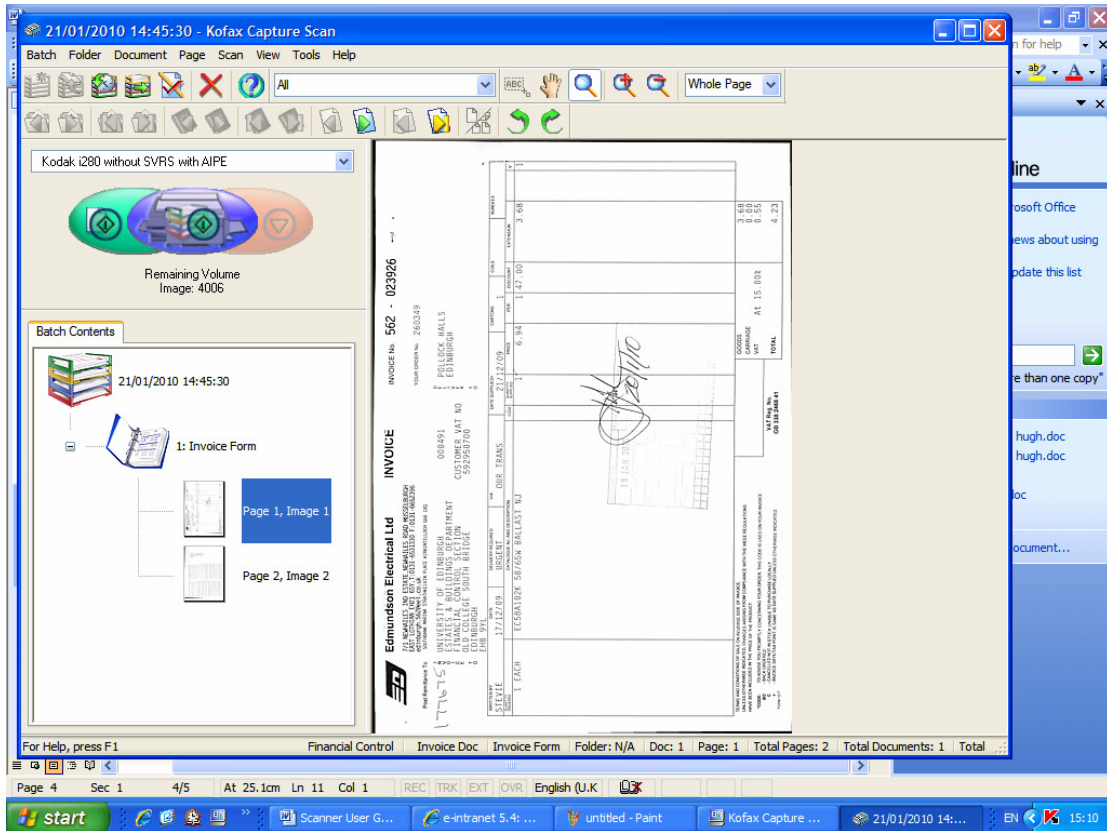
If you have any Invoices/Credits which are double sided click Scan | Properties



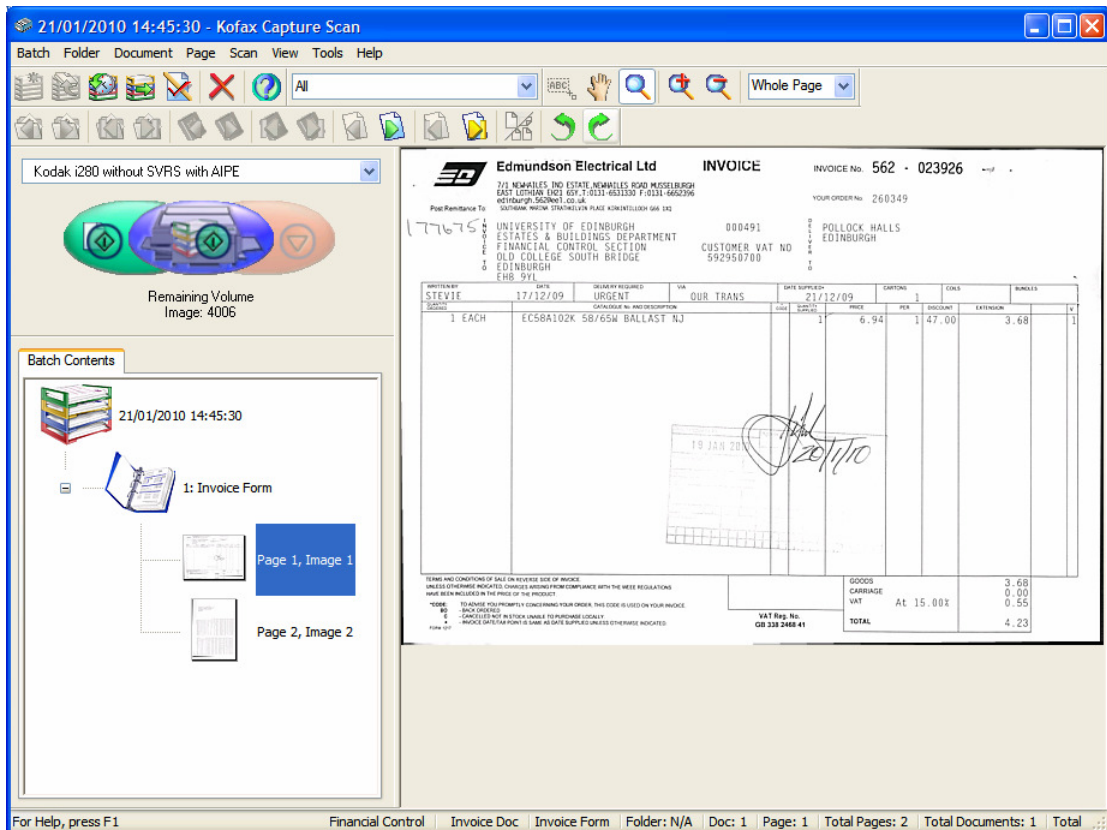
Set Sides to Duplex – this will always default to Single-sided – click OK

Click Start Scan 

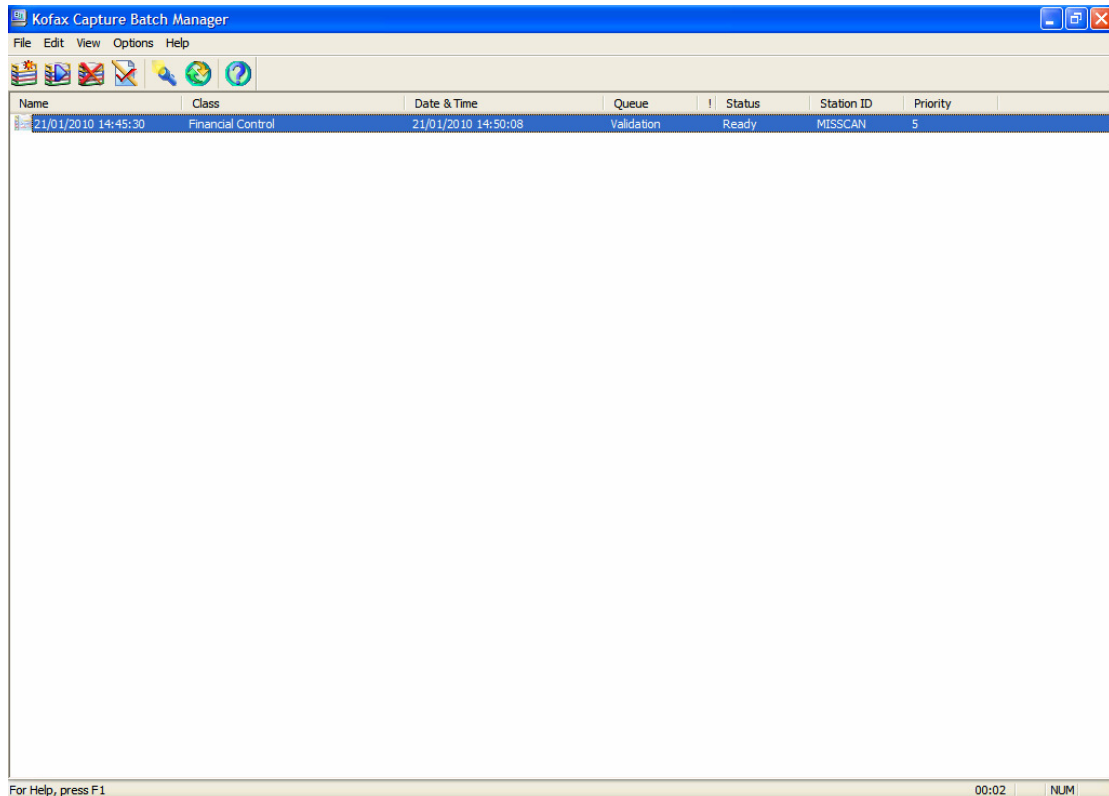
This will scan Invoice/Credit




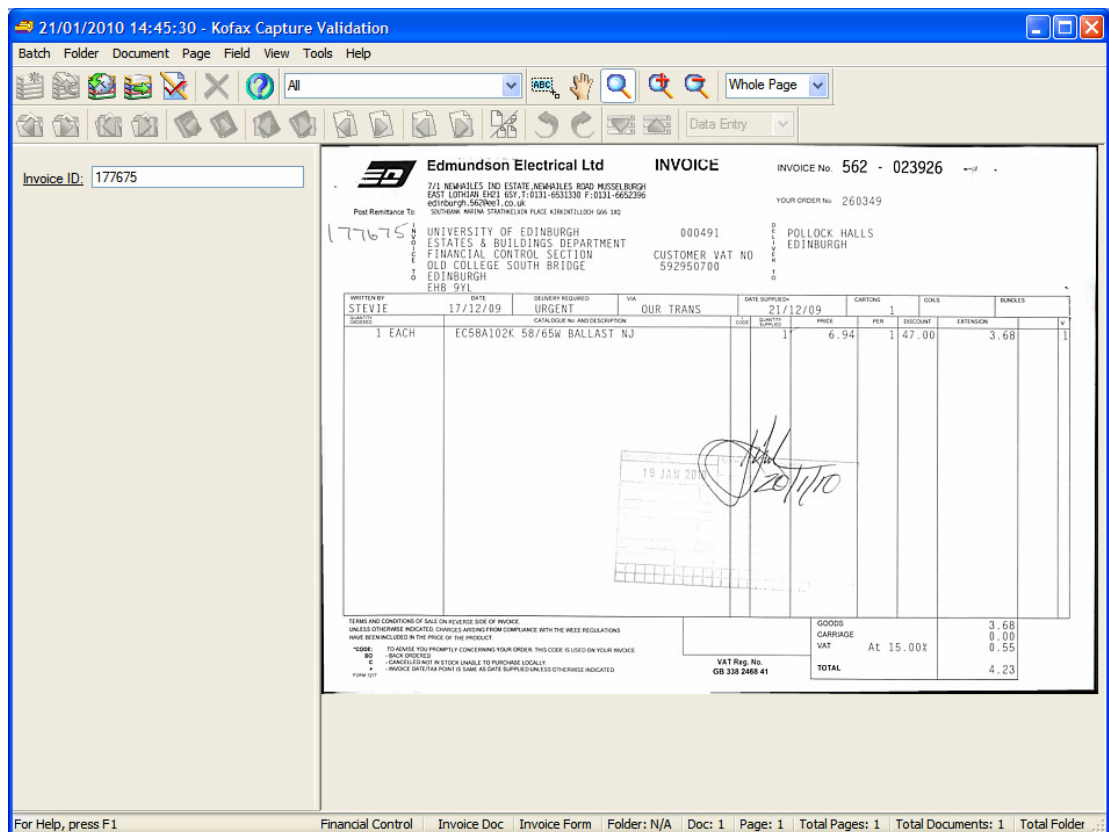
In order to view invoice/credit in a viewable format click on Rotate page 90 deg to right icon



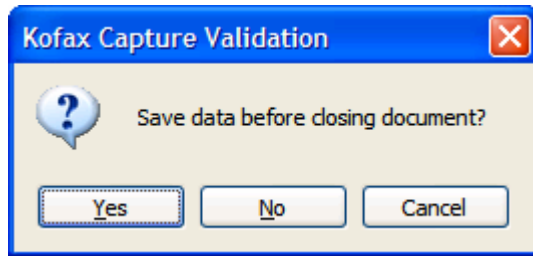
Click on Batch Close



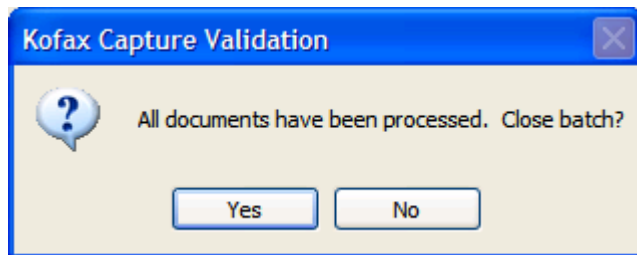
Queue status will change to Validation, click on Process Batch icon 



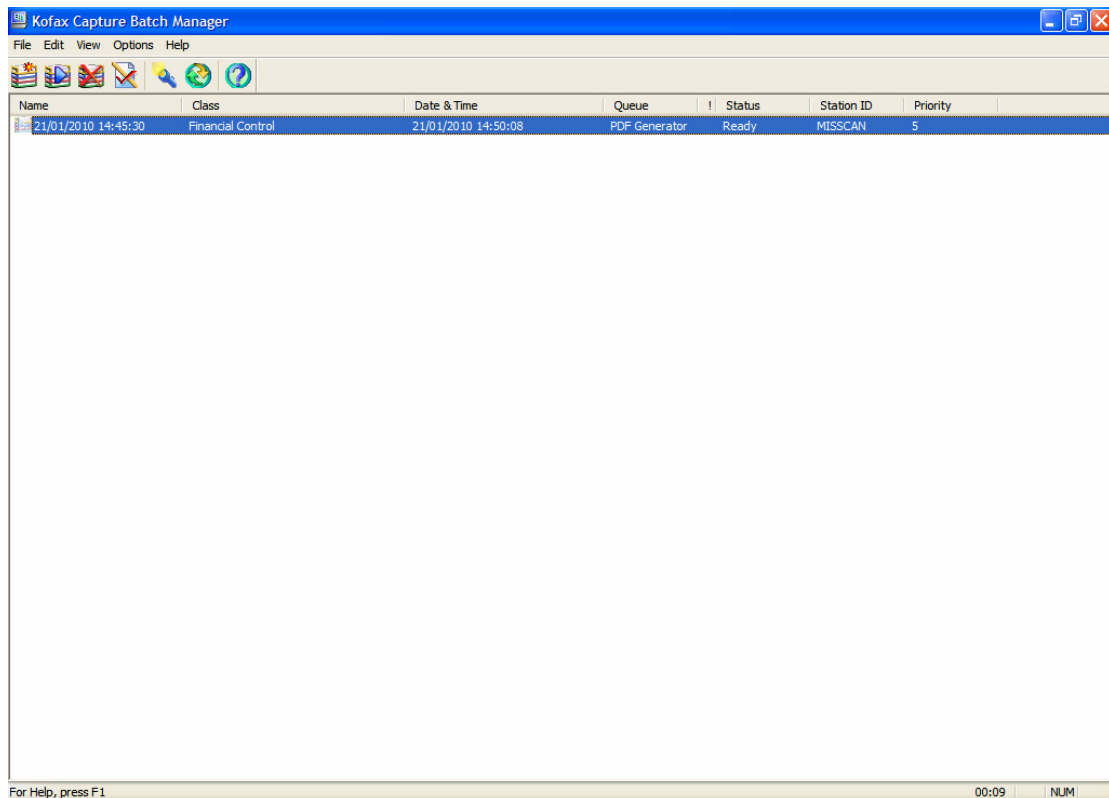
Enter Unique Invoice Id from scanned image into Invoice ID field and tab



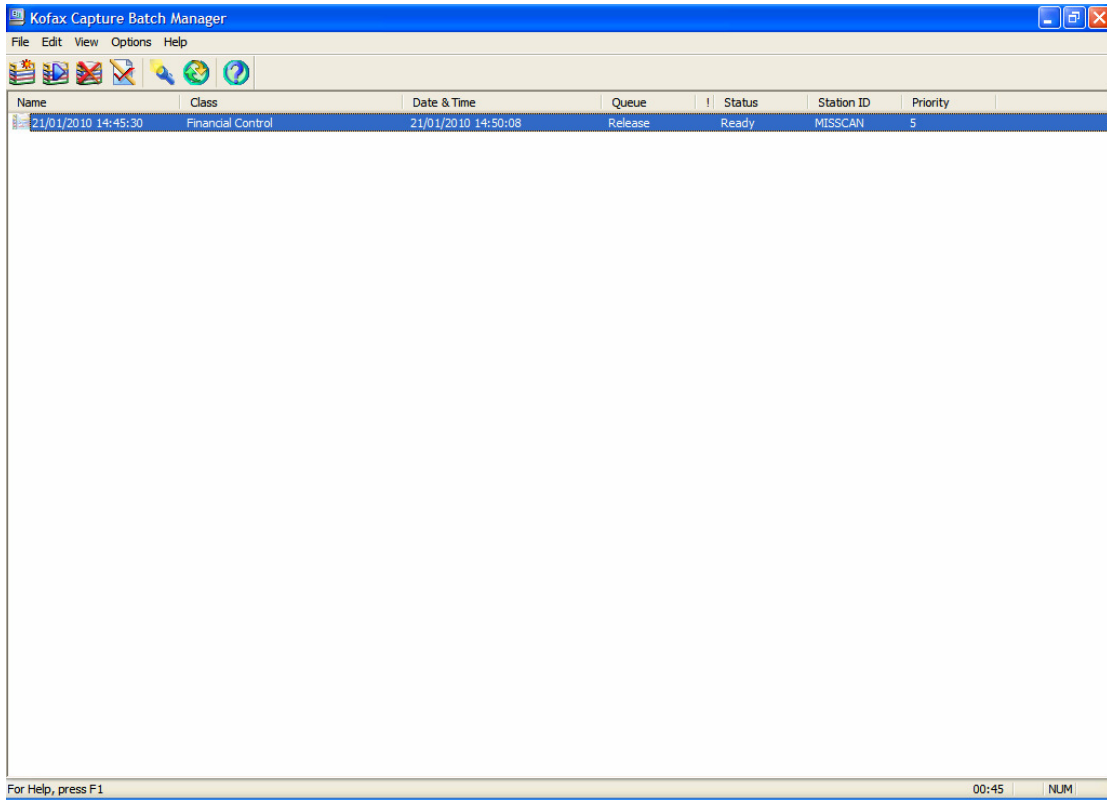
Always ensure you double check you have entered the correct unique invoice ID before saving data. If Invoice ID correct click on Yes.




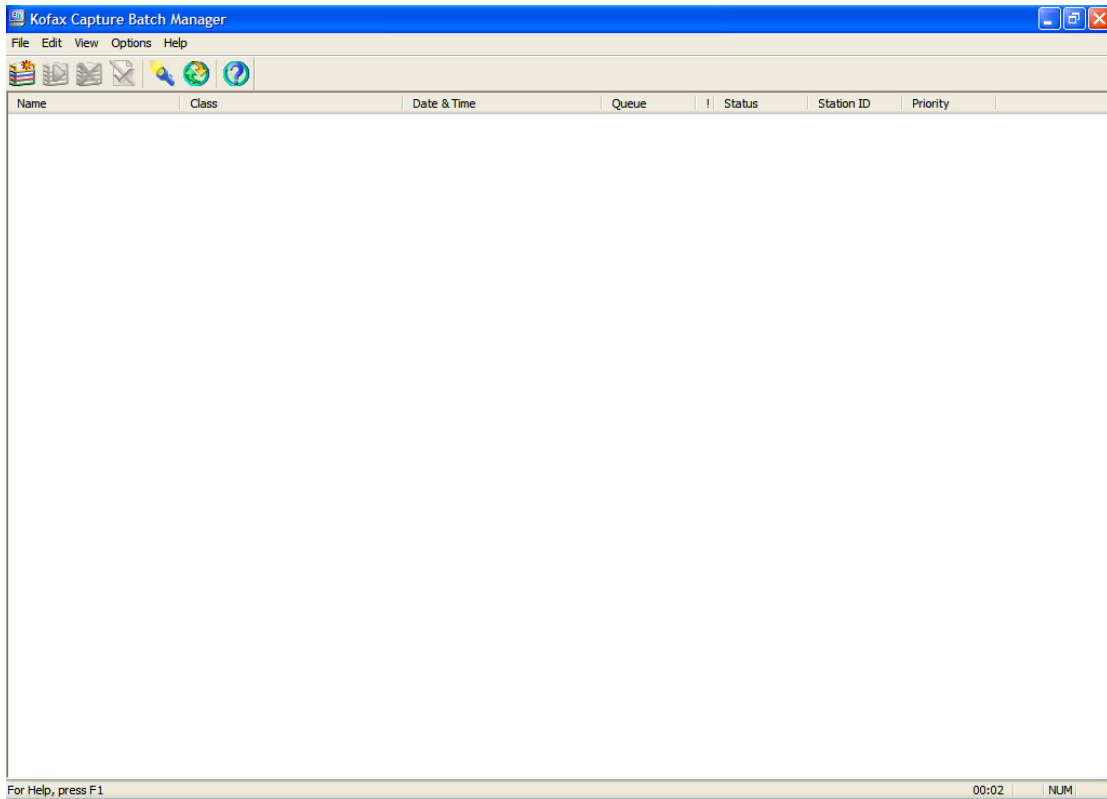
Click Yes to Close batch



Queue now showing as PDF Generator, click on Process Batch icon 



Queue now showing as Release, click on Process Batch icon .



This batch has now been removed from Batch Manager

This Invoice will now show against Order within ATSR