



Estates and Buildings Information System

User Guide

ARCHIBUS/FM V17

Lease Module

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

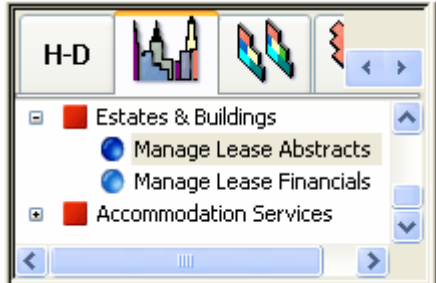
Enter User Name and Password – which are supplied by Ebisusers – then click OK

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

Accessing Lease Module

Click on Real Property and Lease Management Tab  to display Options

Double Click on Estates & Buildings Option, the following should appear

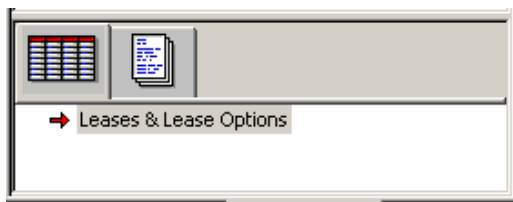


Accessing/Adding/Modifying Information on Leases

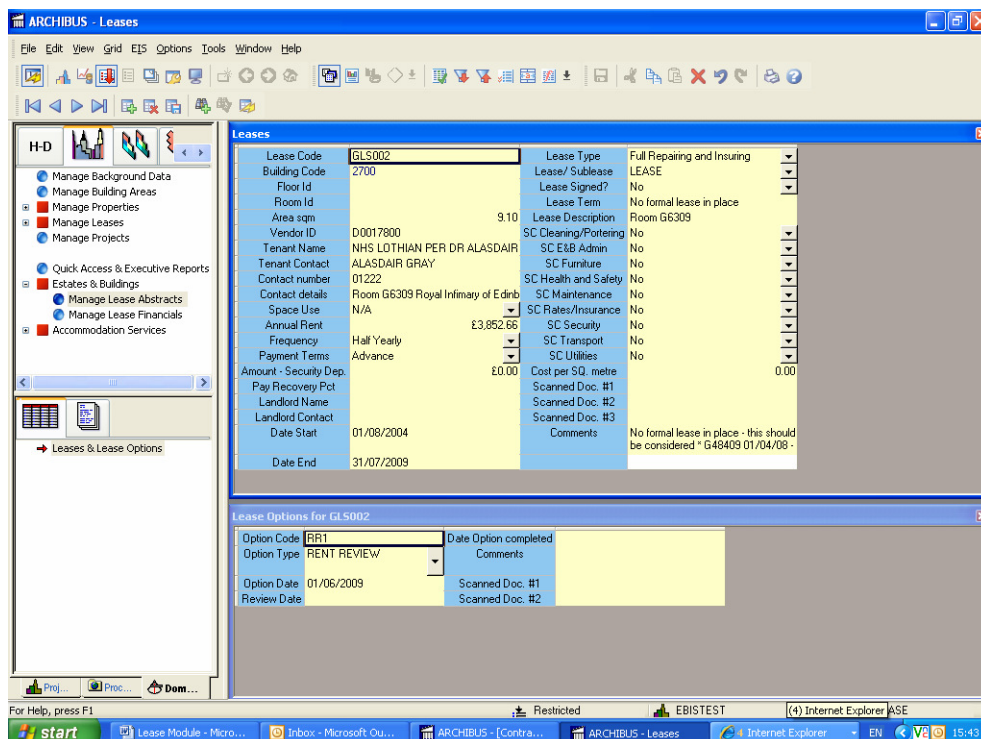
To Access/Add/Modify Information you should click on

- Manage Lease Abstracts

This will open up the following:



Click on Leases & Lease Options to Access/Add/Modify Lease Information.



The screenshot shows the ARCHIBUS - Leases application window. The main window displays lease details for lease code GLS002. The details are as follows:


Field	Value	Field	Value
Lease Code	GLS002	Lease Type	Full Repairing and Insuring
Building Code	2700	Lease/ Sublease	LEASE
Floor Id		Lease Signed?	No
Room Id		Lease Term	No formal lease in place
Area sqm	9.10	Lease Description	Room G6309
Vendor ID	D0017800	SC Cleaning/Portering	No
Tenant Name	NHS LOTHIAN PER DR ALASDAIR	SC E&B Admin	No
Tenant Contact	ALASDAIR GRAY	SC Furniture	No
Contact number	01222	SC Health and Safety	No
Contact details	Room G6309 Royal Infirmary of Edinb	SC Maintenance	No
Space Use	N/A	SC Rates/Insurance	No
Annual Rent	£3,852.66	SC Security	No
Frequency	Half Yearly	SC Transport	No
Payment Terms	Advance	SC Utilities	No
Amount - Security Dep.	£0.00	Cost per SQ. metre	0.00
Pay Recovery Pct		Scanned Doc. #1	
Landlord Name		Scanned Doc. #2	
Landlord Contact		Scanned Doc. #3	
Date Start	01/08/2004	Comments	No formal lease in place - this should be considered * G46409 01/04/08 -
Date End	31/07/2009		

Below the main lease details, there is a section for 'Lease Options for GLS002':


Option Code	Option Type	Date Option completed	Comments
RR1	RENT REVIEW		
Option Date	01/06/2009	Scanned Doc. #1	
Review Date		Scanned Doc. #2	

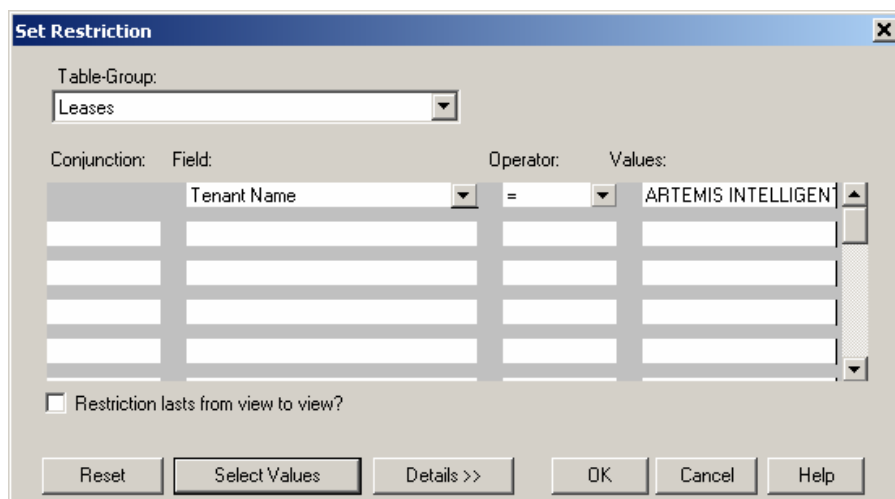
In this screen the main Lease Information is held and can be updated or new Leases added.

To Add a new Lease ensure you are in the Lease Table within the Leases & Lease Options (the Title bar for the Lease table should be highlighted in Blue when you are in that table).

Lease Codes are set up in Numerical Order i.e. GLS001, GLS002 etc. To find out the next Lease Code you will require to go to the last record within this table. To do this click on the end tab  to take you to the last page. Click Insert from your keyboard to Add a new Lease. Your Lease Code will be the next available number i.e. if last no is GLS107 next number will be GLS108. You are now ready to enter your Lease Information for this Code. Building Code, Floor ID and Room ID can be picked up by double clicking in the field and picking up from the relevant Table. Once you have picked up your Building Code only Floor IDs for that Building will show in Floor ID field and once you have picked up your Floor ID only Room IDs for that Floor will show in Room ID field. The other fields within the Lease Table are either drop down lists or free text. Once your info has been added to the Lease table you are then ready to enter your Lease Options info.

To add to the Lease Options table you should click on the Title bar for Lease Options to highlight that you are entering info in this table. Once you click on this the Lease Options will automatically update to enter Lease Option for the Lease Code you are entering details for. The Lease Option Code should relate to the Option Type ie if your Option Type is Rent Review then you should set up your Lease Option Code as RR1. You can add as many Lease Options under one Lease as you require. If you have more than one Option for any of the Option Types then your next one should be Coded with the next numerical code ie RR2.

To Modify or Check details of an existing Lease you will require to set a restriction to bring back the details of the required Lease. To do this click on the Set Restriction tab  from the top toolbar. This will bring back a screen where you can restrict on any of the fields within the Lease Table to find the Lease you require to Modify or Check.



Conjunction:	Field:	Operator:	Values:
	Tenant Name	=	ARTEMIS INTELLIGEN

Restriction lasts from view to view?

Reset Select Values Details >> OK Cancel Help

The Restriction set as above will bring back any Lease which has the Tenant Name ARTEMIS INTELLIGENT POWER. You should now be able to change details of this Lease.

Tickler Reports

Lease Option Exercise Dates

This Report will bring back any Leases where there are any Lease Options set up for the selected date range.

The screenshot shows the ARCHIBUS - Leases application. The main window displays lease details for lease code GLS002. The details include:

Lease Code	GLS002	Lease Type	Full Repairing and Insuring
Building Code	2700	Lease/ Sublease	LEASE
Floor Id		Lease Signed?	No
Room Id		Lease Term	No formal lease in place
Area sqm	9.10	Lease Description	Room G6309
Vendor ID	D0017800	SC Clearing/Potting	No
Tenant Name	NHS Lothian Per Dr Alasdair	SC E&B Admin	No
Tenant Contact	ALASDAIR GRAY	SC Furniture	No
Contact number	01222	SC Health and Safety	No
Contact details	Room G6309 Royal Infirmary of Edinb	SC Maintenance	No
Space Use	N/A	SC Rates/Insurance	No
Annual Rent	£3,852.66	SC Security	No
Frequency	Half Yearly	SC Transport	No
Payment Terms	Advance	SC Utilities	No
Amount - Security Dep.	£0.00	Cost per SQ. metre	0.00
Pay Recovery Pct		Scanned Doc. #1	
Landlord Name		Scanned Doc. #2	
Landlord Contact		Scanned Doc. #3	
Date Start	01/08/2004	Comments	No formal lease in place - this should be considered * G48409 01/04/08 -
Date End	31/07/2009		

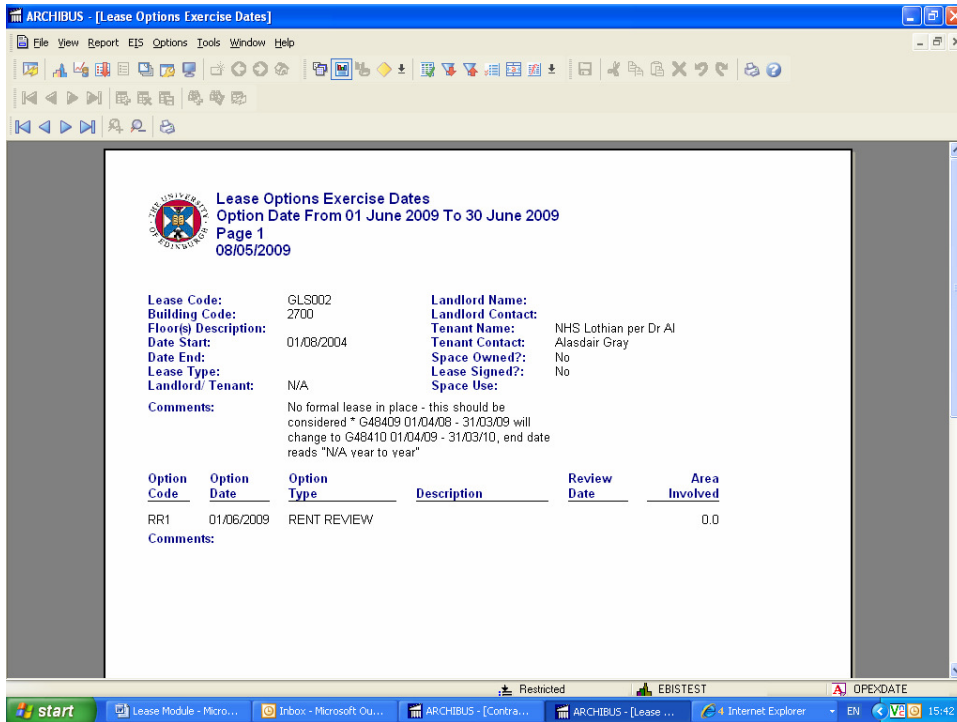
The 'Lease Options for GLS002' window shows:

Option Code	RR1	Date Option completed	
Option Type	RENT REVIEW	Comments	
Option Date	01/06/2009	Scanned Doc. #1	
Review Date		Scanned Doc. #2	

Lease GLS002 has a Lease Option Rent Review set for 01/06/2009. This report can be run for any period you select. Enter your to and from dates then ok to bring back all Leases which have an Option Date which falls within your selection. Select Reports | Tickler Reports | Lease Option Exercise Dates

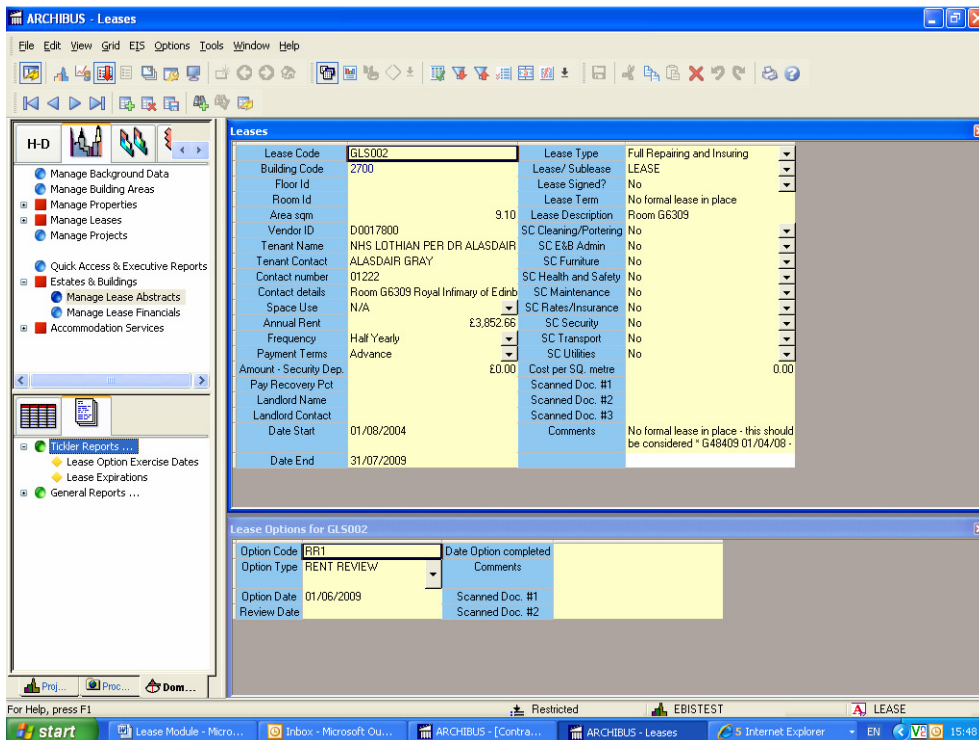
The 'Options' dialog box is shown with the following details:

- Restrict Field: Option Date
- From: 01/06/2009
- To: 30/06/2009
- Buttons: OK, Cancel, Help



Lease Expirations

This Report will bring back any Leases where there are any Leases due to expire for the selected date range.



Lease GLS002 has a Date End for Lease set for 31/07/2009. This report can be run for any period you select. Enter your to and from dates then ok to bring back all Leases which have a Date End which falls within your selection. Select Reports | Tickler Reports ... | Lease Expirations

Leases

Restrict Field: End Date

From: ...

To: ...

OK Cancel Help

ARCHIBUS - [Lease Expirations]

File View Report EIS Options Tools Window Help

Lease Expirations
End Date From 01 July 2009 To 31 July 2009
Page 1
08/05/2009

Lease Code:	GLS002	Landlord Name:	
Date End:	31/07/2009	Landlord Contact:	
Lease Type:		Tenant Name:	NHS Lothian per Dr Al
Date Move In:		Tenant Contact:	Alasdair Gray
Building Code:	2700	Lease/ Sublease:	LEASE
Floor(s) Description:		Parent Lease:	
Landlord/ Tenant:	N/A		

Comments:
No formal lease in place - this should be considered *
G48409 01/04/08 - 31/03/09 will change to G48410
01/04/09 - 31/03/10, end date reads "N/A year to year"

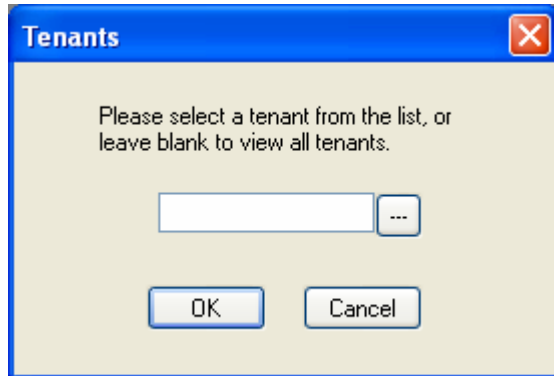
start Restricted EBISTEST LSEXP

Lease Module - Micro... Inbox - Microsoft Ou... ARCHIBUS - [Contra... ARCHIBUS - [Lease ... Internet Explorer EN 15:44

General Reports

Lease Details by Tenant

This report will bring back Lease Details for the selected Tenant



You can leave this search field blank to bring back report for all Tenants or select required Tenant Name from List of Values . Click OK to bring back Lease Details.

