Quick User Guide

1. Web Browsers

RFB can be accessed on most web browsers including:

- Internet Exporer (Versions 10 and 11)
- Microsoft Edge (Windows 10)
- Google Chrome
- Mozilla Firefox
- Safari (Apple)

2. Logging In

Accessing your records, reports and logbooks is very simple. You can login to the system via any Internet-enabled PC, laptop, tablet or Smartphone using the yellow button on the homepage below.

To login, follow the instructions below:

- Type **www.RecordsForBuildings.com** into you web browser
- Click the yellow **Login button** in the top right of the homepage
- Enter you **Username** and **Password** (NB. this information is case sensitive so be sure to enter details exactly as provided)
- Click **Login** to access the newest version of the system.

3. Navigating

Once logged in, RFB is easy to navigate via a series of tabs along the blue bar across the top of the screen (see below image). To select a tab, hover over it and left click the mouse (single click).
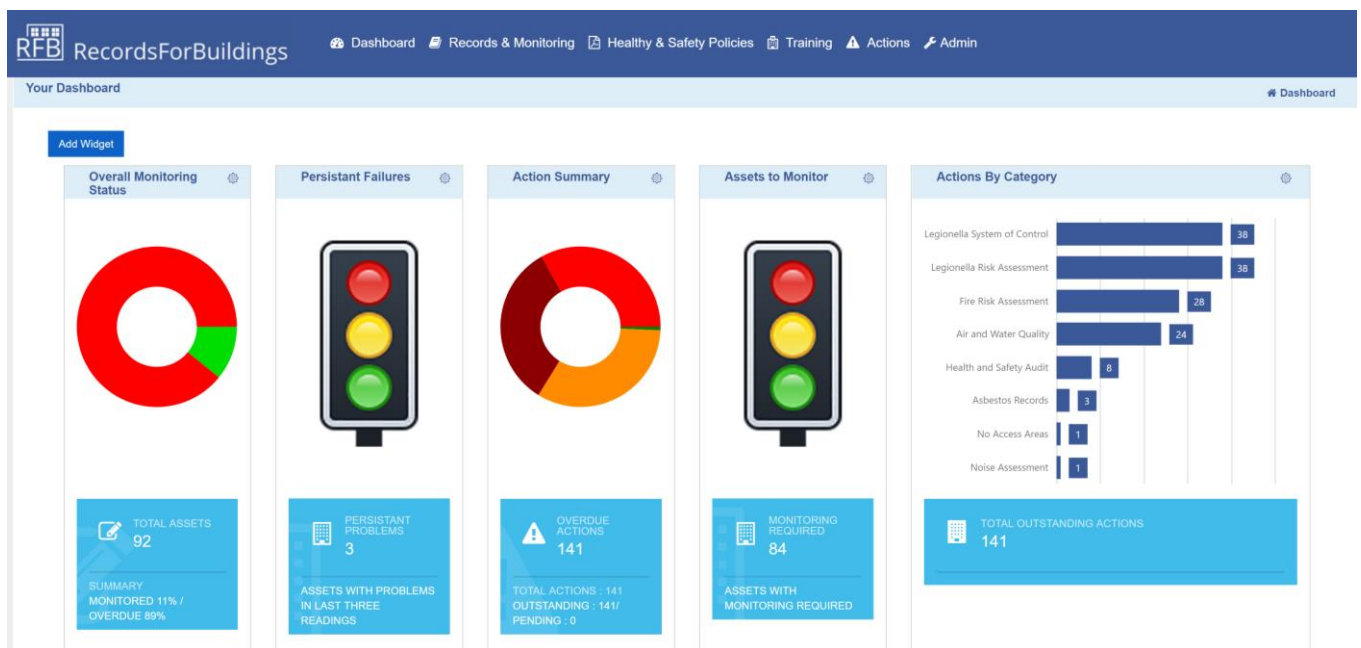

Navigation options include:

- **Dashboard** (Not visibile to **Read-Only** users)
- **Records & Monitoring**
- **Policies & Procedures** (The name of this tab can be changed if required)
- **Training** (Can be switched on or off as required)
- **Actions**
- **Admin**

Some of the tabs such as **Admin** have additional sub-menus that appear at the top of the page when you click the tab. Users with greater permissions such as **Customer Administrators** have more Admin permissions.

4. Dashboard

Once you have logged in, you are directed to the **Dashboard** screen. (**Read-Only** users are directed to the **Records & Monitoring Screen**).

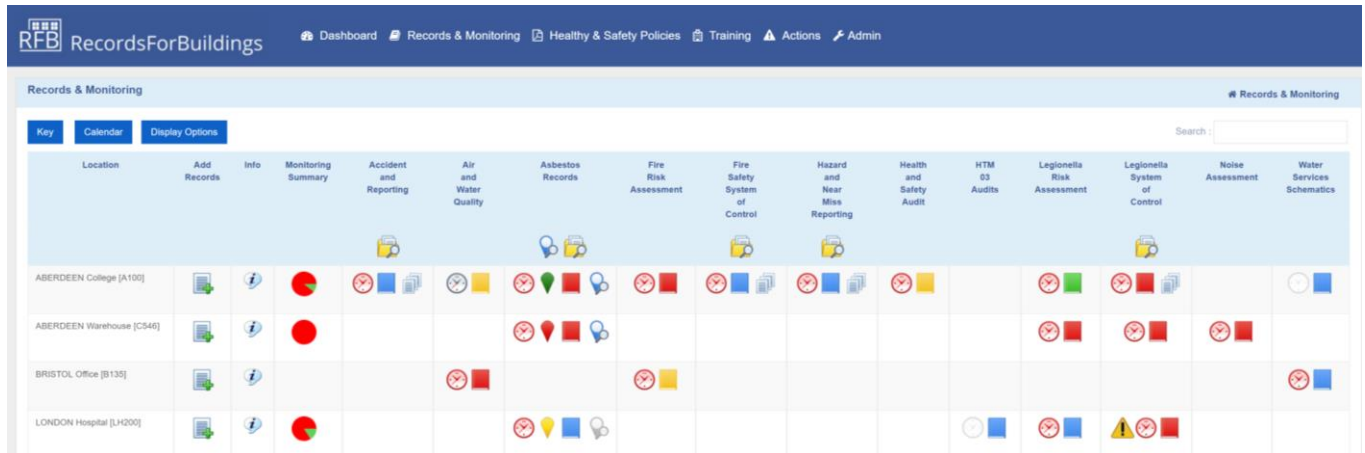The **Dashboard** details overview statistics relating to your records in the form of **Widgets.**

The interactive Widgets provide a 'live-feed' of the status of your records and link directly to your **Logbooks, Actions, Records** and **Asbestos status**.

Widgets can be re-sized and moved by 'dragging and dropping' to different parts of the screen. Periodically, we add more Widgets to the system and you can check if any others are available by clicking the **Add Widget** button at the top of the Dashboard screen.

5.   Records & Monitoring

You can access your reports and listed locations by clicking on the **Records & Monitoring** tab.

Depending on which reports are uploaded to your site, there are a number of columns or **Filing Cabinets** that may contain records or reports (i.e. Legionella Risk Assessments, Logbooks, Asbestos Records, Air Quality Surveys).

Customer Administrator level users can add and edit additional Filing Cabinets with any title you wish via the **Admin** Tab and then Selecting **Manage Records – Manage Cabinets**.

Documents are uploaded into these cabinets against the relevant location or building via the **Add Records** button (shown to the right):

6.   Viewing Documents and Records

If a **book icon with a clock** is present against a location, then there is a report or document uploaded.

The **colour of the book** relates to the priority of any actions uploaded against the records. The **clock colour** links to when the document date expires (or when the document requires review).

To view a report or document:

- Click on the book icon and you will enter a separate screen that lists any reports or documents for that location.
- Click on the **PDF** icon and the report will download as PDF file which you can then click on to open.
- You can **save** or **print** the document via your browser

7.   Legionella Systems of Control (Logbooks)

Icons present in this Filing Cabinet indicates that a logbook or monitoring system exists for this location. There are generally 3 icons in this column as seen in the icon examples below:
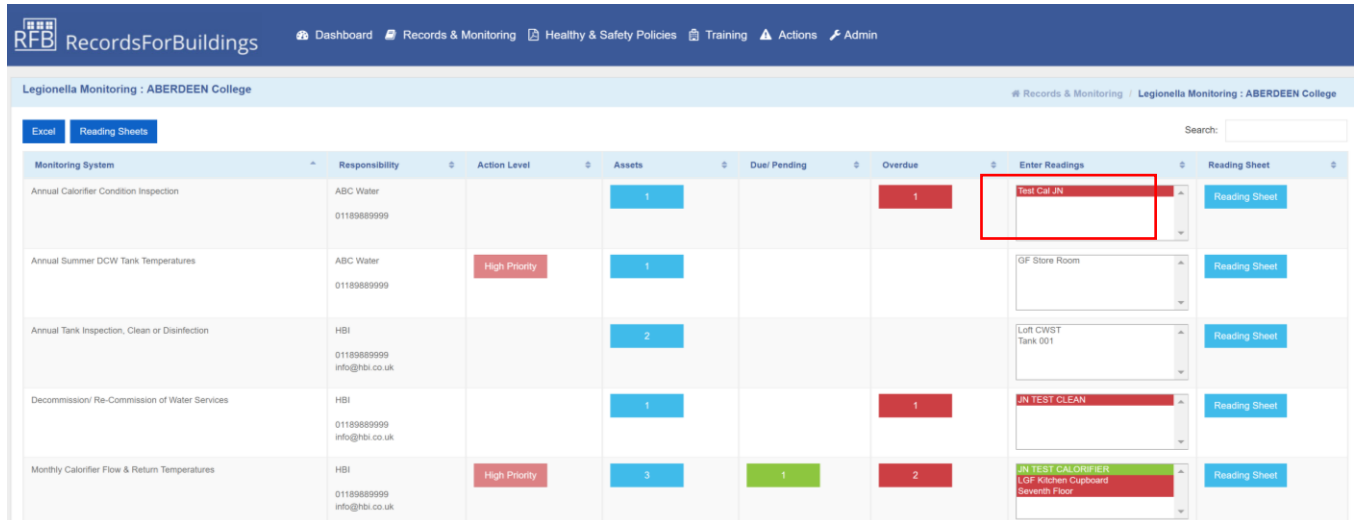

1. **Clock Icon** - Shows whether any monitoring is pending (green), due (amber) or overdue (red)
2. **Book Icon -** Click here to view monitoring records such as temperatures or flushing checks. The colour of the book relates to the priority level of actions associated with the monitoring.
3. **Papers Icon** - The Written Scheme of Control sets out how water systems should be managed, operation and maintenance procedures, as well as containing important contact information.

Adding information to the Logbook

Readings can be entered manually by entering the **logbook** for the location you require, selecting an appropriate asset(s) and filling in the records.

Preferably users will be using our free monitoring App **MyDataCollector** which links automatically with logbooks on RFB. Actions arising from out-of-parameter results will feed into the main **Actions** tabs where they can be managed.

8.   Actions

Remedial actions arising from reports and records are entered into the **Actions** section against the appropriate record.

Adding Actions

You can easily create actions for a report by clicking the **Add or Add Batch** icons on the far right of the report record (see image below).

Viewing Actions

To view actions:

- Click on the **Actions** tab at the top of the screen
- Select the action search parameters you require and click **update results.** RFB will then list any actions associated with your search parameters. You can then edit, complete or achieve the actions according to their status.
- You can also export the selected actions using the blue buttons (EXCEL, WORD, PDF).

Actions are assigned to usernames and if you amend an action, a date, time and username will be added to the action as part of the audit trail. You can edit actions using the Edit button.
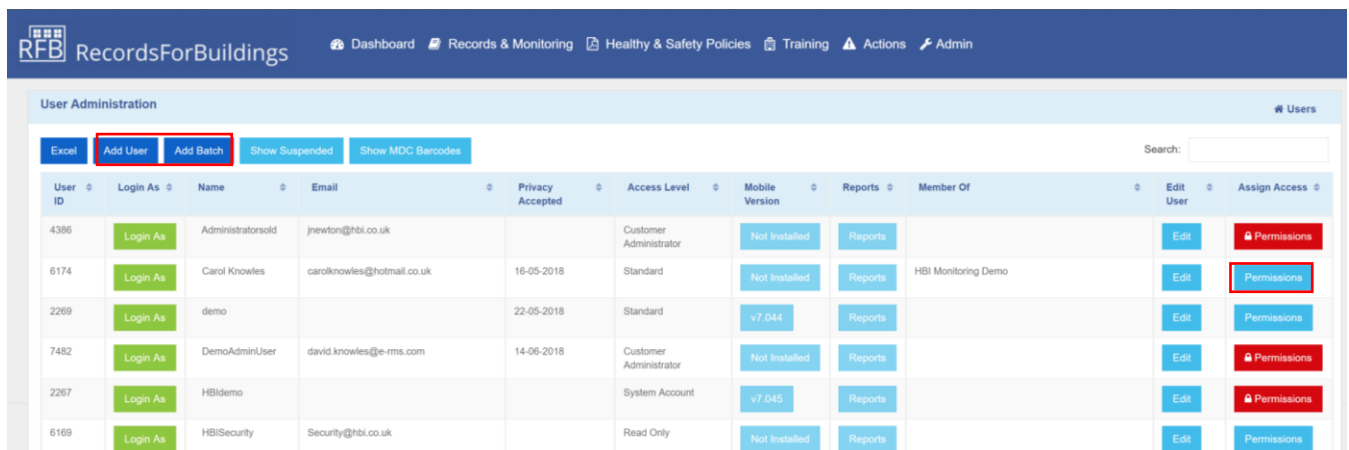
9.   User Levels

There are a number of different levels of user access on RFB that can be easily set up by Admin users. These are as follows:

Access Level	Description of Permissions
Reseller	• Full administrative access for managing multiple client accounts on the system
Customer Administrator	• Full administrative access to all locations and Filing Cabinets • Full access to all Admin Menus and Admin Buttons • Access to Dashboard
Regional Administrator	• Access only to locations or Filing Cabinets as allocated by Customer Administrator • Full access to all Admin Menus and Admin Buttons for allocated records • Access to Dashboard (Access-Specific only)
Standard	• Allocated Access to buildings or cabinets by higher-level users • Access to Dashboard (Access-Specific only)
Read-Only	• Can only view records/ locations allocated by higher level users • Can only view actions allocated to themselves • No access to Dashboard. • Logging in loads Records & Monitoring tab not dashboard

Adding Users

You can add new users on RFB by selecting the **Admin** tab, then clicking the **Add User** button (single user) or **Add Batch** (for adding multiple users) as seen in the image below:

When setting up user levels below Customer Administrator, you must assign locations and Filing Cabinets that this new user can see by clicking the **Permissions** button on the far right of the screen.

Further Help and Assistance

If you require further assistance with using RFB please email our support system support@recordsforbuildings.com.