

Documents of various types can be attached to many objects in FAMIS, such as work orders, purchase requests, buildings, rooms or equipment.

Equipment Parent	CHILLERS-749	CHILLERS	3				
sset Class		J					
Equipment	Specifications	PMs	BOMs	Acquisition	Readings	Alias	
Manufactu	rer —		Location			Acco	unts
Mfr No.				Site UCA	M	WO H	istory
Mfr Part No.				Eloor		Vehicle	Details
Model				Room		Veniore	o o tanto
Serial No.				Zone		Dat	es
						Auc	dit
<ul> <li>Description</li> </ul>	ı ———		General I	nformation —		Attrib	
Kevwor	4		Assess	ment Date		Lifec	
Typ	MAINTAINED		Ser	vice Guide		,	
Asset No			Diatus /	ontal Type		/	
Equip Grou	o [		Rental / Mil	entar Type			_
PM Grou	o [		Replace	ment Cost	'		-
Criticalit	۲ 📃		Ove	rall Rating			

Open the form and query the selected object.

Select the note icon on the right of the icon bar at the top -

hπ	hments <u>W</u> indow <u>H</u> elp													
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😼 Equipm	ent Attachmen	ts - CHILLEI		
Notes	Documents	Mail	Options	
Title				
Text				
New	N	/iew		

Which opens the Attachments window.

From there you can attach documents, create notes or send email, all of which remain connected to the object in the database.

**Attaching Documents** 

E			nts - CHILLE	ERS-749	
	Notes	Documents	Mail	Options	
S	Docum	ent (Filename, U	JRL, etc.)		
N					
-					
_	Vi	ew	New	Edit	

To attach a document, select the Document tab and the New button

Then select a Type from the list. Options include pdf files, web pages, images and others.

	f New Docume	nt 000000000000000000000000000000000000	×
i			
	Туре	PDF (ACROBAT READER FILES)	
	Description		
	Document	Browse	
	<u> </u>	<u>Cancel</u>	

All Microsoft Office documents, Word, Excel etc. use the MSWORD type.

Like all FAMIS forms, all yellow fields are required. Enter a Description, then use the Browse button to select the document

<b>f</b> New Docume	nt ×
- Type Description	PDF (ACROBAT READER FILES)
Document	
	Look İn:       Documents       Image: Construction of the
View	File Name:         Files of Type:         All Files (*.*)         ▼         Open         Cancel

You can use the Files of Type selection to filter the choices. Select the file, then the Open button.

The document name <u>should not</u> <u>be too long</u>, 30 characters or less.

Names with Spaces may not work. Best to re-name and eliminate any spaces.

## University of Idaho

## **Attaching Documents**

f New Docume	nt 000000000000000000000000000000000000	: ×
Туре	PDF (ACROBAT READER FILES)	
Description	CHILLER PLANT MECHANICAL SCHEDULE, PUMPS, MOTORS, ETC	
Document	C:\Users\Mikef\Documents\SCCP_MechSchedule.pdf	
<u>o</u> k	Cancel	

Next the OK button, and after a brief delay, the Documents menu will appear.

2	Equipme	ent Attachmen	its - CHILLE	RS-749		
	Notes	Documents	Mail	Options		
	Document (Filename, URL, etc.) Source					
	CHILLE	R PLANT MECI	HANICAL SC	HEDULE, PU	MPS, MOTORS, ETC	EQUIP

To confirm that the document was saved correctly, select it and then the View button on the bottom of the form.

Once that has been done, the original can be saved or moved. The attached document has been copied to the application server with a unique number attached to ensure there will be no duplicate titles, like this -

```
https://appweb.uidaho.edu:7782/attachdoc/SCCP_MechSchedule-1608.pdf
```

There is not currently a way of printing documents automatically on the work order ticket. You can create a note that will print automatically, referring users to existing documents or anything else.

Use the Print on Work Order	🗗 Edit Note					
Ticket check box	Title					
	LOCATION AND PARTS					
	Text					
	LOCATED CEILING ROOM 30. 1:16">	LOCATED CEILING ROOM 30. 1:16"X20"X2" ENVO FILTER.				
	Print on Work Order Ticket	Note Date	3-SEP-1996 10:22AM			
	Private Note	User	PAULB			
		Source	EQUIP			
	<u> </u>					

## University of Idaho Facilities Services

## Change History

Date	Description	Changed By
16 May 12	Document Created	MikeF
1 Jun 12	Update Document Name info	MikeF