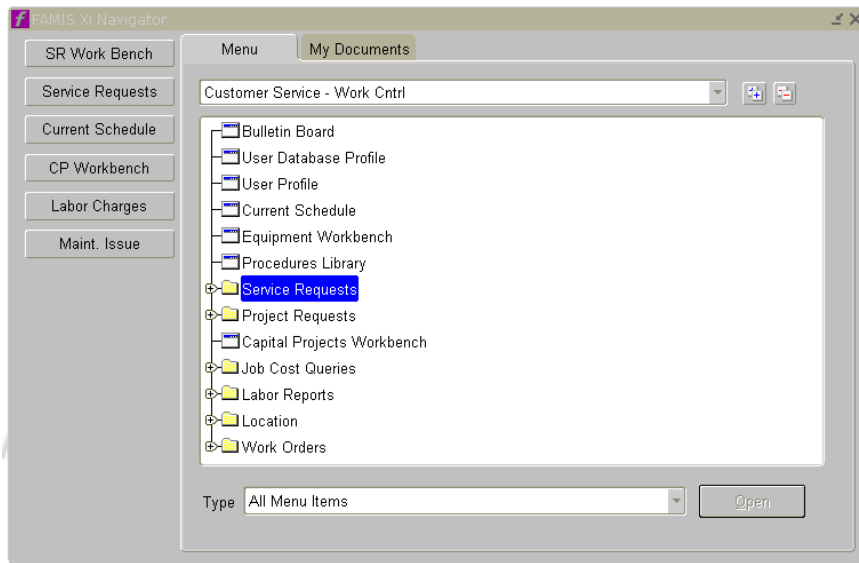


Work Orders in FAMIS

Creating, Updating, Printing, Closing

Normal Work orders in FAMIS start as Service Requests (SRs). Capital Projects and Preventive Maintenance are different but don't concern most people.

When you connect to FAMIS you will start at the FAMIS Navigator screen, which will display your default menu. Assuming that you are able to create SRs, the form should be on your menu, and may already have a QuickPick button on the left.



Locate the Service Requests form and select it.

Tab once to the top white field; ****ASSIGN**** will automatically fill in the yellow field.

Enter address and brief description of work to be done in the format shown above, building or building abbreviation, room (if applicable) description of work.

Tab and enter requestor's name – tab again and enter requestor's phone number (it will fill in automatically if they're already in the system). You can select the name from the list of values to the right of the field.

Tab to the Site field. OCAM (On Campus) is the core of campus but we may do work on WFAR (West Farm), NFAR (North Farm), MOSC (Moscow), etc. The building list will only work for buildings on the site selected, so Holm Research must be WFAR, Manis Lab NFAR, etc.

We need a location for any work whenever possible. Work must be associated with a site and should be associated with a building or land entity if possible. Land Entities are things like fields, lawns, non-building structures such as the Old Administration Bldg Steps, or groups of buildings such as South Hill Vista Apartments. They all start with an L. You can enter the building number if you know it, or an abbreviation which will fill in the number, or select the list of values button to query for the correct building.

Once that is correct, you can enter the room number which will fill in the level number, or select the floor from the level list, then look at the room list of values.

If the service request isn't room specific, enter the floor number if you know what it is. If FAMIS brings up a selection window (say you entered "402" for the room because the work order was in the one and only bathroom in the suite, but 402A, 402B, and 402C are all in the same "402" suite), you can hit **Enter** to select the currently highlighted room number, or **Arrow Key** down to the correct one if you made a mistake.

If this is for a specific vehicle or other piece of equipment, enter the equipment number. The list of values will limit it to equipment from that location. You can enter the equipment number first, and it will fill in the correct location information.

Another benefit of entering equipment is that it should enter the correct Billing information for the work.

Tab to Type and enter the correct type or select from the list.

Common ones are:

FAB –R	Fabricate, metal work, picture frames, cabinet, etc.
MNT-RESRCH	Maintenance done on Research related equipment or spaces
MNT/REP –R	Maintenance or Repair for General Ed
SAFETY – R	Safety specific work

There are several others.

Then enter 1, 2, 3 or 4 for Priority, depending upon the nature of the request -

- Priorities:
- 1: Emergency - Drop everything and do it now
 - 2: Should be done within 24 hours
 - 3: Do within a week
 - 4: Routine Repair / Planned Maintenance

Status depends on several factors. If the work is not going to be done for awhile, you can leave it in Requested status. Once you know the work will proceed soon, you can put it in Scheduled status, which will assign a work order number and put it on the crews Current Schedule list.

Crew is required. Enter the correct value or select from the list of values. It's a smart list, so you only need to type enough letters to make it unique then tab to the next field. FMEL will fill in FMELECTRIC. FMM will tell you to select from the list

If this is to be assigned to a particular person, put their employee code here (first 3 letters of their last name and first 3 letters of their first name). When a work order is assigned to an employee, FAMIS sends an email to the address on their employee record.

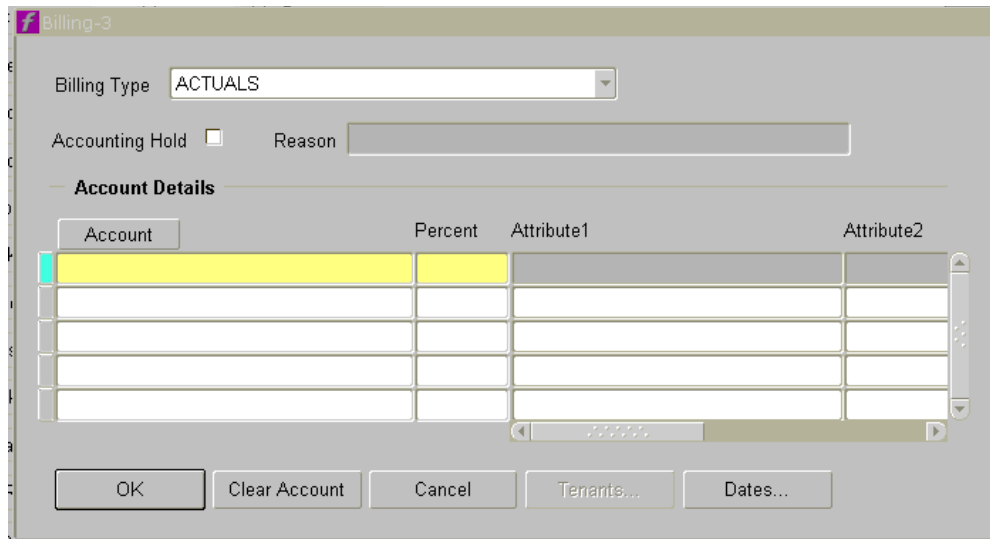
Click the **“Work Plan”** button.

Even though you may not need to enter much information, remember that other people will be looking at this months or years from now. A couple of words explaining what you are doing can save a lot of questions. DOOR HANDLE AND DOOR STOP NEED REPAIRED for a title is OK but adding details about the problem is important.

You can enter a lot of information if it's helpful. Copy and paste the body of the email or other document if useful. Everything in the Task List will be printed on the work order ticket, so you can trim what's entered.

Click the **“X”** at upper right of the Work Plan window to get out.

Click the **Billing** button on the right.



Billing-3

Billing Type: ACTUALS

Accounting Hold: Reason: _____

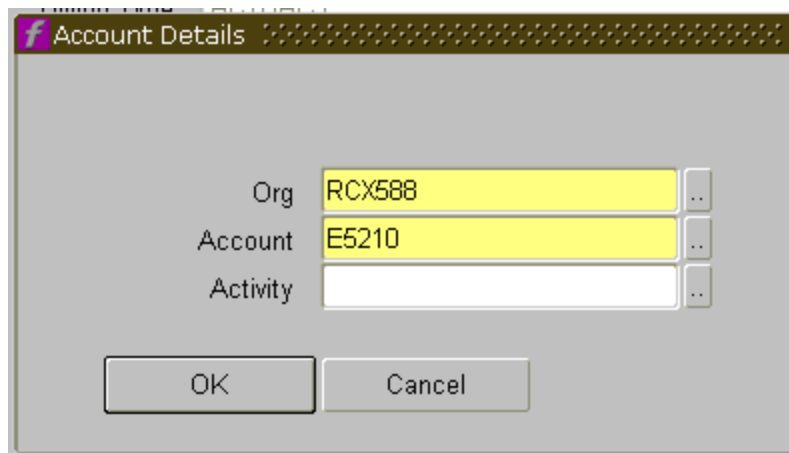
Account Details

Account	Percent	Attribute1	Attribute2

Buttons: OK, Clear Account, Cancel, Tenants..., Dates...

There are several billing types. The default is Actuals, but that only applies to work being done on departmental budgets where we are charging time and materials. For work done on Facilities maintenance budgets we should change that to No Charge. Mixed Type is used for split billing at buildings such as the Student Req Center or SUB.

Service Requests may be left in No Billing status until they are scheduled as work orders, but work orders **MUST** have another billing type and associated account information



Account Details

Org: RCX588 ..

Account: E5210 ..

Activity: ..

Buttons: OK, Cancel

Click the **Account** button.

If you have entered an equipment number, this should already be filled in. If not fill in ORG with the Budget number, tab to Account and enter E5210 unless you are told to use another. Activity codes are rarely used.

Click **OK**. If the work will be done on split budgets, enter the others the same way, then the correct percentages to total 100.

Billing Type: NO CHARGE

Accounting Hold: Reason: _____

Account Details

Account	Percent	Attribute1	Attribute2
RCX588-E5210	43.00		
RCX560-E5210			

Buttons: OK, Clear Account, Cancel, Tenants..., Dates...

Finish by clicking **OK** or hitting **Enter**.

To create the next work order, hit **F3** to clear the window for the next one, and tab once.

If you want to create more service requests, go ahead and repeat the procedure you've just been through for each one.

If you have put this request in Scheduled status to create a work order, you can print the work order ticket from the SR form. Select the Print button on the right side of the main form.

Print - WO197857

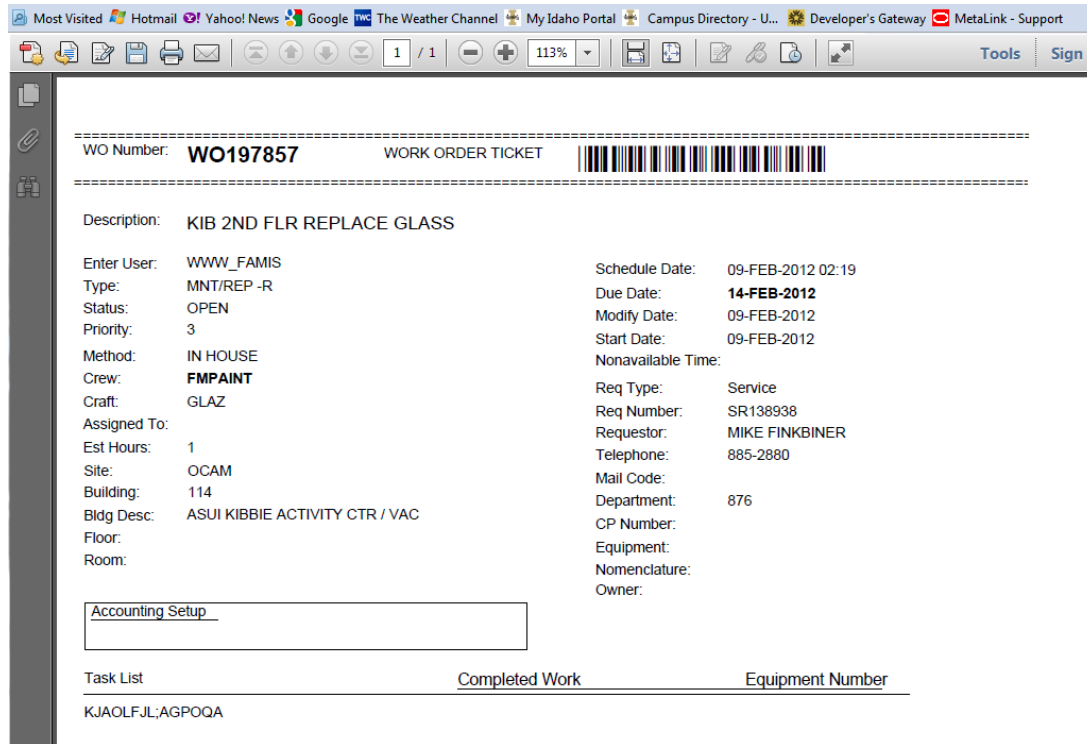
WO Number: WO197857
 All Marked To Print For Crew: ALL
 All Marked To Print For Craft: ALL
 All Marked To Print For Assigned To: ALL
 Complete Route
 Include Secondary Labor

Destination

Type: Screen
Printer: _____

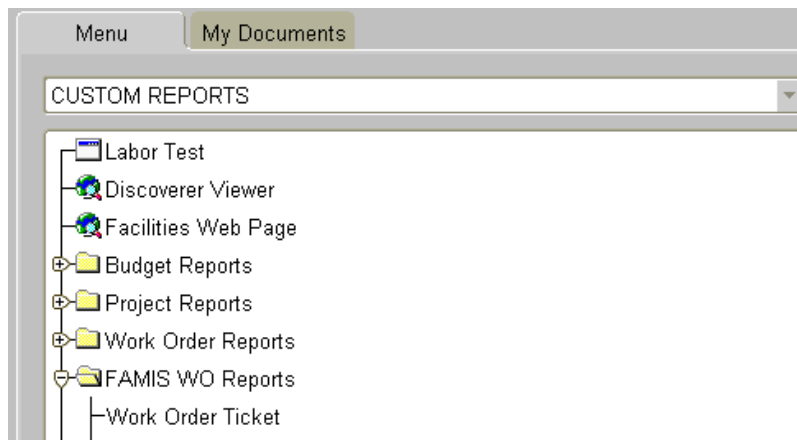
Buttons: Print, Exit

Click **OK** (or hit **Enter**) on the pop-up window that appears after clicking the **Print** button.



Click the **Printer icon** on the upper left and print as normal. If you have chosen to print multiple work orders, think about whether you want them single or double sided.

If, instead, you wish to print all of the work orders currently ready to print, you can use the Work Order Ticket report. That may already be on your menu, but if not change to the Custom Reports menu, open the FAMIS WO Reports folder and select the Work Order Ticket report. You can make a QuickPick button if you want.





Database User Authentication

User name:
 Password:
 Database:

REP-51018: Database user authentication is missing.

As you are logging into the reports server, you will need to enter your user id, password and database. It should already have the name and database entered

By default it will print all FM crew work orders. If you want to print just those for your crew, change the FM% to your crew name IN CAPS, or enough so it's unique. For example FMPLU% will give you just the Plumbing crew, but FMMA% would give you FMMACHINE, FMMAINT and FMMAIL.

Hit **Enter** (or click **Submit Query**).

Report Parameters

Destination Type ▾
 Destination Name
 Destination Format
 Number of Copies

Work Orders To Print

All WOs Marked To Print
 WO Number
 Only for Site
 Only for Crew
(FM%, UR%)
 Only for Craft
 Only for Assigned To
 Maintenance Type
 Request Type(S,P,W,T)
 Print Secondary Labor ?
(N, Y)

Print as above, remembering to consider whether you want to print work order tickets single or double sided.

If you do not print work orders yourself, they will be batch printed a couple of times a day and put in the mailboxes in the front office.

Updating Work Orders or Service Requests

If a service request has been put in Scheduled status, it will be assigned a work order number and appear on the crew's Current Schedule. Until then it can be accessed from the Service Request form or a Service Request Workbench.

If you need to update the SR or Work Order, find the record using the Current Schedule, Workbench or the correct form.

For example, from the Work Order form, you can query for any active or inactive work order. Use the drop down Query menu, the question mark icon or F7 to put the form in query mode. All of the fields you can query will turn blue.

The screenshot shows the 'Work Order' form interface. At the top, there are fields for 'WO Number' (containing '%PUMP%') and 'Parent WO'. Below these are tabs for 'Main' and 'Attributes'. The 'Asset' section includes 'Asset Class' and 'Equipment' fields. The 'General Information' section has fields for 'Type', 'Priority', 'Method', 'Assigned To', and 'Outage Class'. The 'Current Status / Dates' section includes 'Status' (set to 'OPEN'), 'Material Status', 'Start Date', 'Due Date', and 'Completed'. The 'Primary Labor' section has fields for 'Crew' (set to 'FMPL%'), 'Craft', 'Crew Size', and 'Est Hrs/Current Est Hrs'. The 'Location' section includes 'Site', 'Building', 'Floor', 'Room', and 'Zone'. On the right side, there is a vertical toolbar with buttons for 'Print', 'Library', 'Request', 'Related WO', 'Create WO', 'Billing', 'Estimates', 'Dates', and 'Audit...'. There are also 'Tracking 1', 'Tracking 2', 'Non-Available', and 'Travel Time' fields. A checkbox at the bottom right is labeled 'Print Ticket On Next Batch Run'.

You can enter search criteria in one or more fields. In the example above you are searching for any work order that has PUMP in the title. The % are wild cards, so it would return any record which had the letters PUMP anywhere in the description. You could use %PUMP if you knew it ended with PUMP.

The query is also restricted to work orders where the status is OPEN and the crew starts with FMPL.

Select the green light icon, use the drop down Query menu or F8 to execute the query.

The screenshot shows the 'Work Order' form in the FAMIS system. At the top, the 'WO Number' is 'WO199124' and the description is 'SWEET AVENUE FOUNTAINS, REPLACE MAIN CIRCULATING PUMPS'. Below this is a 'Parent WO' field. A navigation bar includes tabs for 'Main', 'Attributes', 'Tasks', 'Crews', 'Parts', 'Tools', 'PO's', 'Routing', 'Readings', and 'Closing'. The 'Asset' section contains 'Asset Class' and 'Equipment' (FOUNTAINS-684 SWEET AVENUE FOUNTAINS). The 'General Information' section includes 'Type' (MNT/REP -R), 'Priority' (3), 'Method' (IN HOUSE), 'Assigned To', and 'Outage Class'. The 'Current Status / Dates' section shows 'Status' (OPEN), 'Material Status', 'Start Date' (24-FEB-2012), 'Due Date' (29-FEB-2012), and 'Completed'. The 'Primary Labor' section includes 'Crew' (FMPLUMB), 'Craft', 'Crew Size', 'Est Hrs', and 'Current Est Hrs'. The 'Location' section includes 'Site' (OCAM), 'Building' (684), 'Floor' (1), 'Room', and 'Zone'. On the right side, there are buttons for 'Print', 'Library', 'Request', 'Related WO', 'Create WO', 'Billing', 'Estimates', 'Dates', and 'Audit...'. There are also input fields for 'Tracking 1', 'Tracking 2', 'Non-Available', and 'Travel Time', along with a checkbox for 'Print Ticket On Next Batch Run'.

Use the Down Arrow to page through the work orders the query returns. You can also navigate through the stack with the arrow keys in the icons.

If you find the correct record, you can make any changes you need. If the query didn't return it, or returned too many records to search through, you can change or add to the query criteria. In the Query drop down there is a choice for Last Criteria, so you can call up the criteria you used and modify them.

Complex queries can also be done with dates and other factors.

The better the detail on the original setup, the easier it is to find the record later, so keep that in mind while setting up service requests.

Make whatever changes you wish to make. Add to the task list, change the crew, attach a note or other document, assign it to an individual, or anything else. Click the **Save icon**, then click the "X" in the upper right (**NOT** the red X for the whole FAMIS program). Or, if you wish to modify other work orders, you can hit **F7** or the Query icon for the next one and repeat the above procedure – click **YES** when it asks if you wish to save the first one.

Completing/Closing/Canceling Work Orders

A work order can be closed by putting it in one of several inactive statuses. We would like to use COMPLETE, but if the work has not been done it should be marked CANCELLED.

Other statuses could be DUPLICATE, where two or more work orders were created for the same job and this one was not used, or SUPERSEDED, where the work was done, but on a different work order.

An important status is FINAL, which means the work order cannot be re-opened for additional charges.

Work orders can be selected for closing in several ways. A useful method is to create a Current Schedule workbench showing all of the work orders in Work Done status. WOs are put in that status when employees use the Work Done checkbox on the timecard form.

Whether using a Current Schedule workbench just for that status, or a more general Current Schedule workbench, locate the work order, put the cursor in the WO number field and right click to bring up the Mouse Menu. One of the choices will be Close.

Select that and the work order will appear in the WO Closing form.

You can use the mouse menu on most forms which have the work order number. You can also open the Work Order Closing form directly and query work orders from there.

From there you can update the task list, check if the material and labor charges are correct, enter the correct status, and if the Completed date isn't correct, update it.

Be careful when you update the task list.

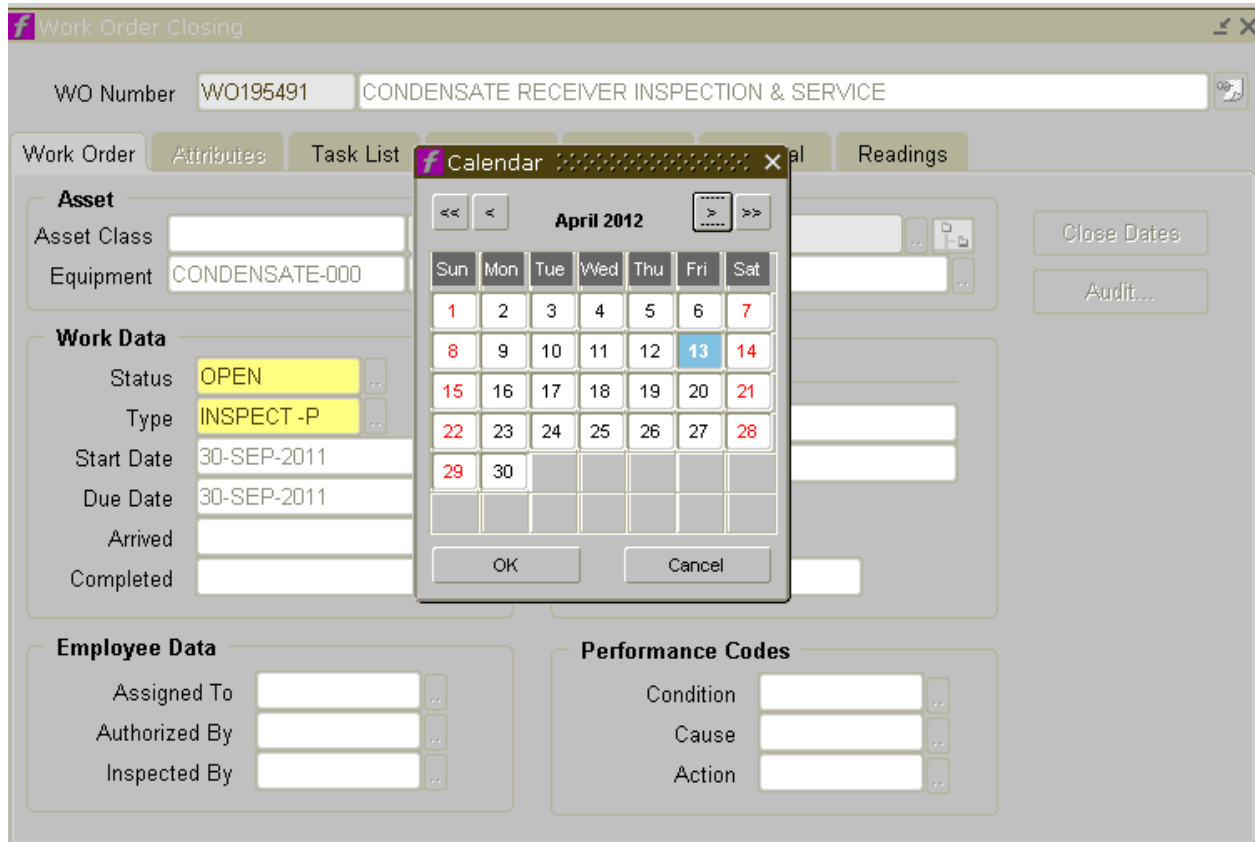
FAMIS highlights entire fields when you tab to them. The next keystroke will delete everything unless you click in the field first to un-highlight it.

If you DO accidentally delete, you can recover by going to the Clear icon or selecting Clear from the Record drop down menu.

That will clear the form and NOT save the changes, so you can re-query and try again.

Modify Status appropriately – COMPLETE if work order was finished, CANCELLED or one of the other statuses discussed above if appropriate.

For the Completed date, you can enter manually or select the list of values button to the right of the date field. That will bring up the calendar



Find the day on which the work order was actually completed by the work crew, and double-click it. This will change the Completed date to that day, as well as making the time 12:00AM.

Click the **Save icon** on upper left, or, if you have more work orders to close, hit **F7** to query the next work order number. FAMIS will ask if you want to save the changes – click **Yes** (or hit **Enter**). The blue Query window will now appear for your next work order to close. Key in the next work order number and hit **F8**...

Change History

Date	Description	Changed By
3 June, 2010	Created Document	Joy Stotz
30 March, 2012	Added UI Template	Tim Haight
13 Apr, 2012	Updated for FM crews, removed UR specific references	Mike F