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Overview of Service Request – Work Order Workflow in FAMIS

Figure 1 Work Order Workflow
Logging into FAMIS

1. Double Click on Internet Explorer
2. Click on the address bar
3. Enter https://accessuh.uh.edu
4. Press Enter to go to AccessUH
5. Log in using your CougarNet credentials.
6. Click on FAMIS icon
7. Click on the “Maintenance” tab
If there is a Security Warning pops up:

1. Check on **I accept the risk and want to run this application**
2. Click **Run** button
3. Do it again if it continues to ask. Depending on the specific configuration, Internet Explorer may ask to check this box up to 3 times.

If you have problem with getting FAMIS to display correctly, **please contact FAMIS Support at:** famissup@central.uh.edu

---

Select a Tab

After successfully logging-in, there will be **TABS** located at the top of the window.
Depending on the user’s role in FAMIS, you will have the specific tabs such as Maintenance, Key Control, Inventory, Reports, Visual Map, etc.

**Click on one of the tabs to go to FAMIS Home Screen:**
FAMIS Home Screen:

FAMIS Home Screen can be identified by “FAMIS Xi Home” right under the tabs.

FAMIS Home Screen includes 3 main parts:

1. Role selection
2. Content window
3. Shortcut buttons
Role Selection:

Depending on what type of user you are, you will see different roles such as Crew Technician, Project Manager, Maintenance Mgmt Supervisor, Warehouse Coordinator, Business Admin, etc.

If you are assigned more than one role in FAMIS, you will see different roles when clicking on the role selection. For each role you choose, the contents in the content window below will be changed.
Content Window:

Content Window includes 3 main parts:

Folder

A folder’s icon is represented by this symbol 🗂️. Each folder can be expanded when you click on the “plus sign” on the left of the yellow icon. Each folder has forms and reports that relate to the folder name. For example, the Work Order folder will include Work Order form, Work Order reports, etc.

Forms

A form’s icon is represented by this symbol 📄. Each form serves a specific purpose and shows different information. For example, the Work Order form help users track and change WO information, task list, crew, job assignment, statuses, etc. Double click to the icon to open the form.

Reports

A report’s icon is represented by this symbol 📊. Each report will show information related to the name of the report. Double click to the report to open the report.
Shortcut buttons

Depending on the user’s role, the shortcut buttons will appear on the left side. For example, Maintenance Mgmt Supervisor will have shortcut buttons to WO Backlog, Labor Approval, Labor Charges, Work Orders, Work Order Closing, etc. Shortcut buttons help user quickly go to the forms and reports instead of finding them in the content window.

Click on a button to go to that form.
Form navigation

Open a form

You can open a form by either clicking on a Shortcut button or by double clicking on a form in the content window:

Click on these shortcut buttons

Or double click on the forms here
Navigation Bar functions

Navigation bar can be found at the top of any form in FAMIS.

<table>
<thead>
<tr>
<th>Function</th>
<th>Toolbar Icon</th>
<th>Keyboard Commands</th>
<th>Menu Bar</th>
</tr>
</thead>
<tbody>
<tr>
<td>Back</td>
<td></td>
<td></td>
<td>File &gt; Back</td>
</tr>
<tr>
<td>Home</td>
<td></td>
<td></td>
<td>File &gt; Home</td>
</tr>
<tr>
<td>Save/Commit</td>
<td></td>
<td>F + 10</td>
<td>File &gt; Save/Commit</td>
</tr>
<tr>
<td>Screen Print</td>
<td></td>
<td>Shift + F8</td>
<td>File &gt; Screen/Print</td>
</tr>
<tr>
<td>Enter Query</td>
<td></td>
<td>F7</td>
<td>Query &gt; Enter Query</td>
</tr>
<tr>
<td>Execute Query</td>
<td></td>
<td>F8</td>
<td>Query &gt; Execute Query</td>
</tr>
<tr>
<td>Count Hits</td>
<td></td>
<td>Shift + F2</td>
<td>Query &gt; Count Hits</td>
</tr>
<tr>
<td>Cancel Query</td>
<td></td>
<td>Ctrl + Q</td>
<td>Query &gt; Cancel</td>
</tr>
<tr>
<td>Insert Record</td>
<td></td>
<td>F6</td>
<td>Record &gt; Insert</td>
</tr>
<tr>
<td>Duplicate Record</td>
<td></td>
<td>F4</td>
<td>Record &gt; Duplicate</td>
</tr>
<tr>
<td>Delete Record</td>
<td></td>
<td>Shift + F6</td>
<td>Record &gt; Delete</td>
</tr>
<tr>
<td>Clear Record</td>
<td></td>
<td>Shift + F4</td>
<td>Record &gt; Clear</td>
</tr>
<tr>
<td>First Record</td>
<td></td>
<td></td>
<td>Record &gt; First</td>
</tr>
<tr>
<td>Previous Record</td>
<td></td>
<td>[Up Arrow]</td>
<td>Record &gt; Previous</td>
</tr>
<tr>
<td>Next Record</td>
<td></td>
<td>[Down Arrow]</td>
<td>Record &gt; Last</td>
</tr>
<tr>
<td>Last Record</td>
<td></td>
<td></td>
<td>Record &gt; Next</td>
</tr>
<tr>
<td>Attachments</td>
<td></td>
<td></td>
<td>Attachments &gt; Attachments Mail Templates Email Templates</td>
</tr>
</tbody>
</table>
Basic Search

Performing search (or query) is one of the most important skills in FAMIS. The search function in FAMIS is used to retrieve information from the database.

Where and when can you perform a search?

Search is used to get the information that exists in the system. You can perform a search in forms only. For each employee in a crew, it is important that you are able to search in Work Order Backlog (Work Order Workbench), Work Order, Purchase Requisition, Service Request, Labor Timecard, etc.

Basic Search function includes 3 main steps:

1. Start the search function
2. Enter your requests / criteria
3. Execute search / query
4. Go to the next result

Examples of basic search are listed in the table below:

<table>
<thead>
<tr>
<th>You give criteria</th>
<th>You get</th>
</tr>
</thead>
<tbody>
<tr>
<td>Work Order Number (e.g., WO123456, WO290830)</td>
<td>Work Order detail information, cost information</td>
</tr>
<tr>
<td>• Your peoplesoftID = 1234566</td>
<td>All work orders assigned to employee that have peoplesoftID = 1234566 and the start date is MON APR 28, 2014</td>
</tr>
<tr>
<td>• Start date = MON APR 28, 2014</td>
<td>All work orders that are assigned to HVAC, have the status of OPEN, and locates at that Building 0585</td>
</tr>
<tr>
<td>• Crew name = HVAC</td>
<td></td>
</tr>
<tr>
<td>• Building = 0585</td>
<td></td>
</tr>
<tr>
<td>• Status = OPEN</td>
<td></td>
</tr>
</tbody>
</table>

Start the search function:

There are two ways to start a search:

1. Click on the icon in the navigation bar
2. Press F7 on the keyboard

The fields in form will turn blue after starting a search (when the fields are not in blue, you cannot perform any search):
Enter your criteria

Enter criteria. It can be one criterion or multiple criteria, depending on your need.

The fields turn blue and allow user to input criteria.
Execute your search

There are 2 ways to execute your search:

1. Click the icon on the navigation bar
2. Press F8 on the keyboard
Go to the next result

You may get multiple results after executing the search. For example, there might be more than one work order that is assigned to you today. In order to navigate to each result, FAMIS provides 4 navigation buttons on the navigation bar:

1. - go to the first result
2. - go to the previous result
3. - go to the next result
4. - go to the last result
Advance Search

‘Wildcard’ search

Sometimes we remember only part of search criteria. For example, we only remember the last four numbers of a work order are 1234, the first name of an employee is ‘Mike’, etc.

FAMIS provides a special ‘wildcard’ character - the percent sign: %.

The percent sign will replace any leading or ending missing characters.

You can put %1234 to search all work orders that have 1234 as its last four numbers are.

Count the results

Before executing the search, FAMIS allows a user to know how many results will come back from the search.

Before clicking on the icon to execute the search, you can click on the icon to count how many results return from the search. The number shows up in the status bar:
Definitions

Maintenance Types of Service Requests

Maintenance type represents the maintenance activity the work order performs. Here is the list of Maintenance Types available in FAMIS and their definitions.

**CORRECTIVE**
- refers to the work that brings facility to its original condition. This activity may consist of repair, restoration or replacement of components.

**ALTERATION**
- refers to the work required to change the interior or physical characteristics of an existing facilities. Alterations may include work referred to as improvement, conversion, rehabilitation, remodeling or modernization.

**PREVENTIVE**
- refers system-generated preventive maintenance and PM route WOs.

**PM REPAIR**
- refers to repair needs identified from regular PM inspections/tasks (failure report, etc.). It is those items self-identified (not initiated from a customer complaint) helping us separate and track reactive vs. corrective via the PM Program.

**SERVICES**
- refers to anything that facility occupants or visitors might need beyond the operational maintenance of the hard assets of the building and its systems. Examples include custodial, event support, waste management, fleet, managing relocations or moves, landscaping, emergency preparedness, and etc....

**ADMIN**
- refers to standing work orders used to track shop supplies.

For more information, refer to [http://uh.edu/plantops/services/services-table/](http://uh.edu/plantops/services/services-table/)

Billing Types

Every Service Request needs a Billing Type.

**Charge**
- Applies to work being done on departmental budgets where we are charging time and materials
No charge
For work done on Facilities Management budgets. There is no charge to the customer.

Cash
Applies to billable works that are pay with cash/check/credit card

No Cost
Applies to works that are free of charge such as IT and warranty work orders

Direct Bill
Applies to billable works that are to be invoiced to customers

Statuses
This section only discusses the statuses of a Service Request.

REQUESTED
Used to indicate that the Service Request has been entered in FAMIS.

DECLINED
Used to indicate that the Service Request has been declined

SCHEDULED
Used to indicate that the Service Request has been converted to a Work Order and sent to the crews.

WAIT APPR
Used to indicate that the Service Request is waiting for certifying signature to approve or decline.

APPROVED
Used to indicate that the Service Request is approved and waiting for Call Center employees to process and dispatch to the crews.

Priority
Priority field defines the priority of the work order. Here is the list of Work Order priorities available in FAMIS and their definitions:
<table>
<thead>
<tr>
<th>Priority Code</th>
<th>Description</th>
<th>When to Use</th>
<th>Response Time</th>
<th>Due Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>EMERGENCY</td>
<td>Respond immediately: leak/flood, power outage, gas leak, safety/hazard issue, chemical spill, property damage, critical research, public relations.</td>
<td>Immediate</td>
<td>Same day</td>
</tr>
<tr>
<td>2</td>
<td>URGENT</td>
<td>Respond at first convenient break point: unplanned, security related, compliance/safety, could become an emergency, public relations.</td>
<td>2 hours</td>
<td>2 business days from date requested</td>
</tr>
<tr>
<td>3</td>
<td>ROUTINE</td>
<td>Perform according to normal workbench priority: most corrective work orders, PMs, First-In First-Out</td>
<td>5 days to assign to technician</td>
<td>20 business days or set by supervisor</td>
</tr>
<tr>
<td>4</td>
<td>SCHEDULED</td>
<td>Work must be performed on a set fixed date: events, scheduled project work, planned PM outage, etc.</td>
<td>Within 3 days prior to due date</td>
<td>Set by supervisor</td>
</tr>
</tbody>
</table>

**Crew**

List of available crews in FAMIS:
<table>
<thead>
<tr>
<th>Crew Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>AUTO SHOP</td>
<td>AUTO SHOP</td>
</tr>
<tr>
<td>BMS</td>
<td>BMS CREW</td>
</tr>
<tr>
<td>CUSTODIAL</td>
<td>CUSTODIAL CREW</td>
</tr>
<tr>
<td>ELECTRICAL</td>
<td>ELECTRICAL CREW</td>
</tr>
<tr>
<td>ELEVATOR</td>
<td>ELEVATOR CREW</td>
</tr>
<tr>
<td>F/CM-IT</td>
<td>F/CM-IT CREW</td>
</tr>
<tr>
<td>FIRE ALARM</td>
<td>FIRE ALARM CREW</td>
</tr>
<tr>
<td>FP&amp;C NCAP</td>
<td>FPC CREW</td>
</tr>
<tr>
<td>GEN_MAINT</td>
<td>GENERAL MAINTENANCE CREW</td>
</tr>
<tr>
<td>GROUNDS</td>
<td>GROUNDS CREW</td>
</tr>
<tr>
<td>HVAC</td>
<td>MECHANICAL &amp; DISTRIBUTION CREW</td>
</tr>
<tr>
<td>INSPECTION</td>
<td>INSPECTION CREW</td>
</tr>
<tr>
<td>LAB SERV</td>
<td>LAB SERVICES CREW</td>
</tr>
<tr>
<td>LOCK SHOP</td>
<td>LOCK SHOP CREW</td>
</tr>
<tr>
<td>METROCLEAN</td>
<td>METROCLEAN CREW</td>
</tr>
<tr>
<td>MIC</td>
<td>MINOR IN HOUSE CONSTRUCTION</td>
</tr>
<tr>
<td>MOVES &amp; EV</td>
<td>MOVES &amp; EVENTS CREW</td>
</tr>
<tr>
<td>PEST CONTL</td>
<td>PEST CONTROL CREW</td>
</tr>
<tr>
<td>PLAN MAINT</td>
<td>PLANNED MAINTENANCE CREW</td>
</tr>
<tr>
<td>PLANNING</td>
<td>PLANNING CREW</td>
</tr>
<tr>
<td>PLANT</td>
<td>CENTRAL PLANT CREW</td>
</tr>
<tr>
<td>SOLID WAST</td>
<td>SOLID WASTE CREW</td>
</tr>
<tr>
<td>WARRANTY</td>
<td>WARRANTY SHOP</td>
</tr>
</tbody>
</table>
## Service Request Workbench

### Overview
Service Request Workbench provides you a list of service requests in the system.

![Service Request Workbench Image](image-url)

- **Location:** 
  - Building: 
  - Floor: 
  - Room: 
- **Start Date:** 
- **Submiter:** 
- **Service Request Information:**
  - Request Number:
  - Request Title:
  - Request Details:
- **Contact Information:**
  - For technical assistance, please contact techsupport@abctech.com.
  - For information about a building index, please contact buildinginfo@abctech.com.
  - For billing questions, please contact billing@abctech.com.

*Please note: this web application is optimized for Google Chrome browser.*
Searching for Service Requests

There are various ways to search for service requests or work orders within your department.

**SR Information**

One of the ways a user can search for a Service Request (SR) is by entering some specific information about a particular Service Request. The following attributes are some of the criteria that can be used to search for a particular SR or WO:

1. **Request Number**
   - Under the “Service Request Information” Section, enter a SR number in the text box labeled “Request Number”.
   - Click Submit.
   - This will bring up the specified SR.

   *Note:* If you are unsure of the exact service request number, you may filter your search using any other attribute listed below.

2. **Requestor PSID**
   - You may search for a SR using the PeopleSoft ID of the requestor by entering their PSID in the text box labeled “Requestor PSID”.

   *Note:* This will only display the SRs requested by the particular person with the unique PSID.

3. **Request Status** – current status of the service request or work order
4. **Speed Type** – 5-digit index of the cost center
5. **Maintenance Types** – type of work performed on request

   - **CORRECTIVE** – refers to the work that brings facility to its original condition. This activity may consist of repair, restoration or replacement of components.

   - **ALTERATION** – refers to the work required to change the interior or physical characteristics of an existing facility. Alterations may include work referred to as improvement, conversion, rehabilitation, remodeling or modernization.

   - **PREVENTIVE** – refers to system-generated preventive maintenance and PM route WOs.

   - **PM Repair** - refers to repair needs identified from regular PM inspections/tasks (failure report, etc.). It is those items self-identified (not initiated from a
customer complaint) helping us separate and track reactive vs. corrective via the PM Program.

- **SERVICES** – refers to anything that facility occupants or visitors might need beyond the operational maintenance of the hard assets of the building and its systems. Examples include custodial, event support, waste management, fleet, managing relocations or moves, landscaping, emergency preparedness, pest control, IT support for Plant Operations, etc.

**Note:** The more information you enter in this section, the faster and more precise the database will bring up your SR or WO.

<table>
<thead>
<tr>
<th>Service Request Information</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Request Number:</strong></td>
</tr>
<tr>
<td><strong>Requestor PSID:</strong></td>
</tr>
<tr>
<td><strong>Request Status:</strong></td>
</tr>
<tr>
<td><strong>Speed Type:</strong></td>
</tr>
<tr>
<td><strong>Maintenance Type:</strong></td>
</tr>
<tr>
<td><strong>Crew:</strong></td>
</tr>
</tbody>
</table>

**Location and Date**

Users can search for multiple SR's at a time by using a more general search criterion such as the location or date.

6. **Location** – location of work
   a. You may search for a particular SR or WO using the “Location” section by entering a Site ID, building number, floor number, and room number.
Note: This section is organized in a hierarchical manner. This means that you MUST first enter a Site ID before you enter a building number. Furthermore, you must enter a building number before you can enter a floor number, etc.

7. **Start Date** – date the service request becomes a work order
A user can also search through the database for SR or WOs if they know the general time period that a particular SR or WO was made. The “Start Date” field of the report is defaulted to pull data for the last three months. To search for work orders older than three months simply clear the date field.

   a. If you wish to search between specific time frames. Go to the section “**Start Date**”.
   b. Click on the text box labeled “From”. A calendar will appear, scroll through the dates until you find the start date as desired.
   c. Next, repeat the step above for the End Date by clicking on the text box labeled “To”.

**Service Request Workbench**

<table>
<thead>
<tr>
<th>Location:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Site ID:</td>
</tr>
<tr>
<td>Building:</td>
</tr>
<tr>
<td>Floor:</td>
</tr>
<tr>
<td>Room:</td>
</tr>
</tbody>
</table>

**Start Date:**

| From: |
| To: |
FILTERING YOUR RESULTS

Once the database returns a result or set of results, the user can further filter the results in order to find the required SR or WO.

The Search Field

The *search field* is a tool that allows users to filter the results in real time. For example, if the user decides to do a general search for SR or WOs in a building, there may be multiple results. However, if the user knows the requestor, they can type the name of the requestor into the search bar to filter on only the WO’s that were submitted by that particular user.

The information that **CAN** be entered in the search field includes the following:

- SR Number
- Requestor Name (First and Last)
- Requestor ID (PSID)
- Department Number
- Building Number
- Room Number
- Request Date
- SR Status
- Crew
- Billing Type
- Cost Center
- Description

*Note: Spelling is important*

**Sorting Ascending and Descending Order**

The user can also sort the results in the result table by **clicking on the arrows** located in each of the column headings.
Use the **Next and Previous Buttons** (located at the lower right side of the screen) to navigate through pages of search results.

<table>
<thead>
<tr>
<th>ELECTRICAL</th>
<th>CHARGE</th>
<th>$0</th>
<th>ADD LIGHTING TO ROOM</th>
</tr>
</thead>
<tbody>
<tr>
<td>MOVES &amp; EV</td>
<td></td>
<td>$0</td>
<td>ELECTRICAL - NO POWER TO OUTLET</td>
</tr>
<tr>
<td>MOVES &amp; EV</td>
<td></td>
<td>$0</td>
<td>ELECTRICAL - NO POWER TO OUTLET</td>
</tr>
<tr>
<td>FIRE ALARM</td>
<td>CHARGE</td>
<td>$345.6</td>
<td>WORK REQUEST FOR HOT WORK PERMIT FOR NEW CONSTRUCTION.</td>
</tr>
<tr>
<td>HVAC</td>
<td>NO CHARGE</td>
<td>$0</td>
<td>ROOM IS TOO HOT</td>
</tr>
</tbody>
</table>

**Export to Excel**

To download the results returned from your search, click on the “**Export to Excel**” button. An excel spreadsheet will be downloaded and you may print or save your information. **You must have Adobe Flash Player installed to export to excel.**
Update and Verify Service Request

The Service Request Workbench gives you the list of Service Requests.

This section shows you how to go to individual Service Request and update specific information in it.

Open an existing Service Request

To view detailed information of the work order or service request, click on the hyperlink.

<table>
<thead>
<tr>
<th>SR Number</th>
<th>Request Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>SR434892</td>
<td>WAIT APPR</td>
</tr>
<tr>
<td>SR437794</td>
<td>WAIT APPR</td>
</tr>
<tr>
<td>GR438008</td>
<td>WAIT APPR</td>
</tr>
<tr>
<td>SR438201</td>
<td>WAIT CUST</td>
</tr>
<tr>
<td>SR438386</td>
<td>WAIT APPR</td>
</tr>
<tr>
<td>SR438420</td>
<td>WAIT APPR</td>
</tr>
<tr>
<td>SR438532</td>
<td>WAIT APPR</td>
</tr>
</tbody>
</table>

Update Location

1. After clicking on the SR hyperlink, go to the Location Information section, and change the location information using the drop downs. Remember to go in order from site, building, floor, and room.
Update Other SR Information

1. Find appropriate field to change.
2. Use fields or dropdowns to change.
Update and Verify Billing Information

Normally Call Center employees do not need to update the Billing Information. However, in some cases, Call Center employees have to do it.

Verify or Update Billing Information

1. Go to Billing Type and Cost Center(s) section.
2. Verify the Billing Type:
3. Verify the account information:
4. Verify the total percent of account segment **equals to 100%**

<table>
<thead>
<tr>
<th>Billing Type</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Billing Type:</strong></td>
<td><strong>CHARGE</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Cost Center(s)</th>
<th>Speed Type:</th>
<th>Business Unit:</th>
<th>Fund Code:</th>
<th>Department ID:</th>
<th>Program:</th>
<th>Project ID:</th>
<th>Percentage (%)</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>00730</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>100</td>
<td></td>
<td>Clear</td>
</tr>
<tr>
<td></td>
<td>00730</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>100</td>
<td></td>
<td>Clear</td>
</tr>
<tr>
<td></td>
<td>00730</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>100</td>
<td></td>
<td>Clear</td>
</tr>
</tbody>
</table>
Update Task List

1. Go to the Task List section
2. Update the task list in the Add New Comments textbox with details for service request
3. Click Update Service Request Button

Task List

CALLED OUT ELEC TECH BILL AND CHRIS 6:35 A.M.

OFFICER DISPATCHER CALLED AT 6:07 A.M. TO REPORT TRANSFORMER BURNT OUT BEHIND THE SOFT BALL FIELD ALSO CENTER POINT WAS OUT HERE ON CAMPUS

SVALDEZ
3-29-18

Add New Comments

Add Attachments and Notes

1. Go to Upload Files section.
2. Click browse to find file on computer
3. Click Upload to upload file.
4. Repeat as necessary.
Create a Service Request

Create a new Service Request

1. Go to SR Workbench
2. Click Crew New Request button

Service Request Workbench

3. Enter PSID of requester and click the look-up button

Service Request Form

Requestor

Enter PSID:  

Requestor Name:  

Phone:  

Enter Alt. Requestor's PSID:  

Alternate Requestor:  

Alternate Phone:  

Contact Information

For technical issues:  
For information:  
For billing questions:  

*Please note:*

Send Remit  
Recoverability
4. Enter Location Information and Work Order Description section.

**Location**

<table>
<thead>
<tr>
<th>Site: *Required</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select...</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Bldg: *Required</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select an Option</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Floor:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select an...</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Dept:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select an Op...</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Method:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>

**Work Description**

<table>
<thead>
<tr>
<th>Work Title: *Required</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Description of Work:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Maintenance Type: *Required</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select...</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Priority: *Required</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select...</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Status: *Required</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select...</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Crew: *Required</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select...</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Craft:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Earliest Start Date:</th>
</tr>
</thead>
<tbody>
<tr>
<td>12-May-2018</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Latest Completion Date:</th>
</tr>
</thead>
<tbody>
<tr>
<td>12-Jun-2018</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Dates/Times Work Cannot be Done in Location:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>

**Billing**

5. Enter Billing information.

**Billing**

<table>
<thead>
<tr>
<th>Billing Type: *Required</th>
</tr>
</thead>
<tbody>
<tr>
<td>Change</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Enter Speed Type:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business Unit:</td>
</tr>
<tr>
<td>####</td>
</tr>
<tr>
<td>Fund Code:</td>
</tr>
<tr>
<td>####</td>
</tr>
<tr>
<td>Department ID:</td>
</tr>
<tr>
<td>####</td>
</tr>
<tr>
<td>Program:</td>
</tr>
<tr>
<td>####</td>
</tr>
<tr>
<td>Project ID:</td>
</tr>
<tr>
<td>####</td>
</tr>
<tr>
<td>Percentage (%):</td>
</tr>
<tr>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Enter Speed Type 2:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business Unit:</td>
</tr>
<tr>
<td>####</td>
</tr>
<tr>
<td>Fund Code:</td>
</tr>
<tr>
<td>####</td>
</tr>
<tr>
<td>Department ID:</td>
</tr>
<tr>
<td>####</td>
</tr>
<tr>
<td>Program:</td>
</tr>
<tr>
<td>####</td>
</tr>
<tr>
<td>Project ID:</td>
</tr>
<tr>
<td>####</td>
</tr>
<tr>
<td>Percentage (%):</td>
</tr>
<tr>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Enter Speed Type 3:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business Unit:</td>
</tr>
<tr>
<td>####</td>
</tr>
<tr>
<td>Fund Code:</td>
</tr>
<tr>
<td>####</td>
</tr>
<tr>
<td>Department ID:</td>
</tr>
<tr>
<td>####</td>
</tr>
<tr>
<td>Program:</td>
</tr>
<tr>
<td>####</td>
</tr>
<tr>
<td>Project ID:</td>
</tr>
<tr>
<td>####</td>
</tr>
<tr>
<td>Percentage (%):</td>
</tr>
<tr>
<td></td>
</tr>
</tbody>
</table>

**Submit**
Convert a Service Request to Work Order

When a Work Order is created, it goes directly to the Crew to complete the tasks.

In order to convert a Service Request to a Work Order, change the current status of the Service Request to SCHEDULED.

Normally, for BILLABLE SR, once the status of the Work Order is APPROVED, Call Center employee changes it to SCHEDULED to convert that SR to a Work Order.

Call Center and Work Orders

Normally, the Call Center only deals with the Service Requests. Sometimes, however, information about the Work Order may change. In addition, customers may call and ask about the status of a Work Order.

Finding Work Orders

1. Go to Work Order Workbench
2. Use Parameters to search for work order
3. Review Service Request Workbench section above for similar search and edit instructions

<table>
<thead>
<tr>
<th>Key Admin Test</th>
<th>Key Audit</th>
</tr>
</thead>
<tbody>
<tr>
<td>WO Error Report</td>
<td>WO Workbench</td>
</tr>
</tbody>
</table>
Current Schedule Workbench / WO Backlog

There are two ways to open Current Schedule / WO Backlog:

1. Click on **WO Backlog shortcut button** on the left
2. Select **Maintenance Mgmt Supervisor** or **Crew Technician** in the role selection, then Double click **Current Schedule** form under **Schedules** folder
Current Schedule Workbench / WO Backlog Overview

The Schedule Workbench lists all work orders that meet predefined criteria. The lists may be different depend on the filters that we set up. It can be the list of all open work orders for your crew, the list of all work orders that are assigned to yourself, etc.

Each line in the list gives information about one Work Order. We can see that WO Number, Start Date, Building, Priority, Status, Description, Craft, Maint Type, Crew, Assigned person, Equipment that associates with the Work Order, Due Date, Service Request Number, Scheduled Date, Department, etc. You can change the order of the columns.
Create custom view
To view work orders that meet specific criteria, click Edit

<table>
<thead>
<tr>
<th>Folder</th>
<th>All Work Orders</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>ID</th>
<th>Status</th>
<th>Description</th>
<th>Craft</th>
<th>Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>3</td>
<td>OPEN</td>
<td>HVAC FAN, CENTRIFUGAL, UP TO 5,000 CFM SEMI-ANNUAL PM</td>
<td>PREVENTIVE</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>OPEN</td>
<td>HVAC ZONE CONTROL SEMI-ANNUAL PM</td>
<td>N/Z MAINT</td>
<td>PREVENTIVE</td>
</tr>
<tr>
<td>3</td>
<td>OPEN</td>
<td>HVAC ZONE CONTROL SEMI-ANNUAL PM</td>
<td>N/Z MAINT</td>
<td>PREVENTIVE</td>
</tr>
<tr>
<td>3</td>
<td>OPEN</td>
<td>HVAC FAN COIL UNIT SEMI-ANNUAL PM</td>
<td>PREVENTIVE</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>OPEN</td>
<td>HVAC CENTRIFUGAL PUMP OVER 1 H.P. QUARTERLY PM</td>
<td>PREVENTIVE</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>OPEN</td>
<td>HVAC AIR HANDLING UNIT, 3 TONS THROUGH 24 TONS QUARTERLY PM</td>
<td>PREVENTIVE</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>OPEN</td>
<td>HVAC CENTRIFUGAL PUMP OVER 1 H.P. QUARTERLY PM</td>
<td>PREVENTIVE</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>OPEN</td>
<td>HVAC FAN, CENTRIFUGAL, UP TO 5,000 CFM SEMI-ANNUAL PM</td>
<td>PREVENTIVE</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>OPEN</td>
<td>HVAC BOILER, HOT WATER, OIL, UP TO 120 M3H MONTHLY PM</td>
<td>PREVENTIVE</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>OPEN</td>
<td>HVAC ZONE CONTROL SEMI-ANNUAL PM</td>
<td>N/Z MAINT</td>
<td>PREVENTIVE</td>
</tr>
<tr>
<td>3</td>
<td>OPEN</td>
<td>HVAC ZONE CONTROL SEMI-ANNUAL PM</td>
<td>N/Z MAINT</td>
<td>PREVENTIVE</td>
</tr>
<tr>
<td>3</td>
<td>OPEN</td>
<td>HVAC FAN, CENTRIFUGAL, UP TO 5,000 CFM SEMI-ANNUAL PM</td>
<td>PREVENTIVE</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>OPEN</td>
<td>HVAC COMPRESSED AIR DRYER SEMI-ANNUAL PM</td>
<td>PREVENTIVE</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>OPEN</td>
<td>HVAC COMPRESSED AIR DRYER SEMI-ANNUAL PM</td>
<td>PREVENTIVE</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>OPEN</td>
<td>HVAC BOILER, HOT WATER, OIL, UP TO 120 M3H MONTHLY PM</td>
<td>PREVENTIVE</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>OPEN</td>
<td>HVAC FAN COIL UNIT SEMI-ANNUAL PM</td>
<td>PREVENTIVE</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>OPEN</td>
<td>HVAC CENTRIFUGAL PUMP OVER 1 H.P. QUARTERLY PM</td>
<td>PREVENTIVE</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>OPEN</td>
<td>HVAC ZONE CONTROL SEMI-ANNUAL PM</td>
<td>N/Z MAINT</td>
<td>PREVENTIVE</td>
</tr>
</tbody>
</table>
1. Click Filter, select desired criteria; you may choose to view work orders that belong to a certain crew, craft, labor type, building, department etc. You may select more than one criteria.

2. After selecting criteria, click display, then click duplicate.

3. Enter a name for a Filter, click OK.

4. Click OK again, work orders that meet criteria will be displayed.
Current Schedule Functionalities

Assign Work Orders to Employees

1. Put checkmarks on Work Orders that you want to assign
2. Click Assign WO... button
3. Enter the employee’s PeopleSoft number if you know or click on the button to search for an employee, please refer to Basic Search and Advance Search sections to get more detail information about searching in FAMIS
4. If you click on button in step 3, enter search criteria. It can be Name, Crew, Craft, and/or Employee Number. For example, you can search for any employee with first name of David in ELECTRICAL Crew. Please refer to Basic Search and Advance Search section from page 18 to 22 to get more detail information about search function
   4.1. Press F8 or the button to execute the search
   4.2. FAMIS may return multiple rows. Click on a row that you want (the row will turn green at that time)
   4.3. Click OK button
5. If you also want to change the status of the Work Orders to ASSIGNED, check the box next to Change Status To Assigned
6. Click OK Button
Mass Closing Work Orders

This functionality is used to change the status of one or more Work Orders.

1. Put checkmarks on Work Orders that you want to change the status
2. Click on Close WO... Button

3. Click on the button next to the Status
4. Click on the status that you want the WOs to have (that status will be highlighted in blue color)
5. Click OK button
6. Click OK button again

Here is the list of Work Order statuses available in FAMIS and their definitions.

<table>
<thead>
<tr>
<th>WO Status</th>
<th>Active</th>
<th>Email Notification</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>ASSIGNED</td>
<td>Y</td>
<td>Y</td>
<td>Work order has been assigned to a specific employee</td>
</tr>
<tr>
<td>COMPLETE</td>
<td>Y</td>
<td>Y</td>
<td>Employee has reported to his/her supervisor that the work has been completed</td>
</tr>
<tr>
<td>OPEN</td>
<td>Y</td>
<td>Y</td>
<td>Work order is active and pending assignment after review by crew supervisor</td>
</tr>
<tr>
<td>REVIEW</td>
<td>Y</td>
<td>N</td>
<td>Work order requires further review to address some type of issue</td>
</tr>
<tr>
<td>EST SENT</td>
<td>Y</td>
<td>N</td>
<td>Quotes for work has been sent to customer</td>
</tr>
<tr>
<td>EST APRVVD</td>
<td>Y</td>
<td>N</td>
<td>Quote has been approved by the customer</td>
</tr>
<tr>
<td>EST RECVD</td>
<td>Y</td>
<td>N</td>
<td>Quote has been returned back to crew supervisor</td>
</tr>
<tr>
<td>HOLD</td>
<td>Y</td>
<td>N</td>
<td>Work Order has been delayed for a reason</td>
</tr>
<tr>
<td>MAT RECVD</td>
<td>Y</td>
<td>N</td>
<td>Material for a work order has been received into the work order. Materials are awaiting pick up from FASTENAL</td>
</tr>
<tr>
<td>WAIT MATRL</td>
<td>Y</td>
<td>N</td>
<td>Used to denote a work order cannot move forward until materials are ordered and received into the work order.</td>
</tr>
<tr>
<td>PARENT ONL</td>
<td>Y</td>
<td>N</td>
<td>Used to denote a work order that is used as a parent for holding information on long term work orders</td>
</tr>
<tr>
<td>RET-SERV</td>
<td>Y</td>
<td>N</td>
<td>Used by AUTO SHOP to denote a vehicle has been returned to service.</td>
</tr>
<tr>
<td>STATUS</td>
<td>CANCELLED</td>
<td>CLOSED</td>
<td></td>
</tr>
<tr>
<td>----------</td>
<td>-----------</td>
<td>----------</td>
<td></td>
</tr>
<tr>
<td>WORK</td>
<td>N</td>
<td>N</td>
<td></td>
</tr>
<tr>
<td>ORDER</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>IS</td>
<td>CANCELLED</td>
<td>CLOSED</td>
<td></td>
</tr>
<tr>
<td>WORK</td>
<td>WILL NOT</td>
<td>REVIEWED</td>
<td></td>
</tr>
<tr>
<td>ORDER</td>
<td>BE PERFORMED</td>
<td>THE WORK ORDER</td>
<td>FOR COMPLETENESS AND NO FURTHER ACTION IS REQUIRED. ALL BILLABLE CHARGES MAY BE RELEASED.</td>
</tr>
<tr>
<td>IF THE CREW OR CALL CENTER CANCELLED THE WORK ORDER, THE CUSTOMER MUST BE NOTIFIED WITH AN EXPLANATION.</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Print Work Order Ticket

1. Put checkmarks on Work Orders that you want to print
2. Click Work Order Ticket on the right
3. Click Print button
Work Order Form

How to open work order form

There are 3 main ways to go to Work Order form:

1. Click on Work Orders shortcut button on the left
2. Double click on a Work Order in WO Backlog
3. Double click on Work Orders form in Work Orders folder from the Home Screen.

3. Double click on one line to view/modify information on Work Order
Searching for Work Orders

Four ways you can search for a specific Work Order:

Searching by entering a Work Order number

1. Press F7 to enter query in the Work Order form; all fields will turn blue
2. Enter the specific WO Number in the blue field
3. Press F8 to run query; F8 will open the specific Work Order
“Wild Card” Search

The Wild Card search option allows you to view all Work Orders that meet a specific criterion. For example, let’s view all Work Orders in Building 585

1. In the Work Order form, press F7 to enter query
2. Once all fields turn blue, enter the specific criteria between 2 percent signs; in this case we will enter %585% to view all work orders in building 585
3. Press F8 to run query; F8 will open the first Work Order
4. Use the arrow keys to navigate to the next or previous work order that meets the same criteria
Multiple Field Search

This feature allows you to view all Work Orders that meet more than one specific criterion. For example, let’s view all Work Orders in Building 585 and assigned to the PLANT crew:

1. In the Work Order form, press F7 to enter query
2. Once all fields turn blue, enter the specific criteria; in this case we will enter PLANT in the crew field and %585% in the building field to view all work orders assigned to the PLANT crew in building 585
3. Press F8 to run query; F8 will open the first Work Order
4. Use the arrow keys to navigate to the next or previous work order that meets the same criteria
Workbench Search

1. To search for a specific Work Order in the work order workbench, press F7 in the workbench; screen below will be displayed

![Current Schedule](image)

2. Enter criteria via the Wild Card Search method in any of the blue fields; for example, let's view all OPEN work orders in building 585
3. Press F8 to run query and view all Work Orders in the work bench that are OPEN and in building 585
4. Double click on the specific work order to view Work Order details
Work Order Form Overview

Work Order form is where you can see and modify any detail information about a Work Order.
1. **WO Number**  
   Unique number assigned to each work order

2. **Work Order brief description**  
   A brief description of current work order (maximum length is 64 characters)

3. **Parent WO**  
   Allows you to view/assign the parent work order of the current work order

4. **Equipment**  
   Allows you to view/edit the piece of equipment that associates with the current work order

5. **Maintenance Type**  
   Maintenance type represents the maintenance activity the work order performs.  
   Here is the list of Maintenance Types available in FAMIS and their definitions.

   i. **CORRECTIVE** – refers to the work that brings facility to its original condition. This activity may consist of repair, restoration or replacement of components.
   
   ii. **ALTERATION** – refers to the work required to change the interior or physical characteristics of an existing facilities. Alterations may include work referred to as improvement, conversion, rehabilitation, remodeling or modernization.
   
   iii. **PREVENTIVE** – refers system-generated preventive maintenance and PM route WOs.
   
   iv. **SERVICE** – refers to anything that facility occupants or visitors might need beyond the operational maintenance of the hard assets of the building and its systems. Examples include custodial, event support, waste management, fleet, managing relocations or moves, landscaping, emergency preparedness, and etc....
   
   v. **ADMIN** – refers to standing work orders used to track shop supplies.
6. **Priority**

Priority field defines the priority of the work order. Here is the list of Work Order priorities available in FAMIS and their definitions:

<table>
<thead>
<tr>
<th>Priority Code</th>
<th>Description</th>
<th>When to Use</th>
<th>Response Time</th>
<th>Due Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>EMERGENCY</td>
<td>Respond immediately: leak/flood, power outage, gas leak, safety/hazard issue, chemical spill, property damage, critical research, public relations.</td>
<td>Immediate</td>
<td>Same day</td>
</tr>
<tr>
<td>2</td>
<td>URGENT</td>
<td>Respond at first convenient break point: unplanned, security related, compliance/safety, could become an emergency, public relations.</td>
<td>2 hours</td>
<td>2 business days from date requested</td>
</tr>
<tr>
<td>3</td>
<td>ROUTINE</td>
<td>Perform according to normal workbench priority: most corrective work orders, PMs, First-In First-Out</td>
<td>5 days to assign to technician</td>
<td>20 business days or set by supervisor</td>
</tr>
<tr>
<td>4</td>
<td>PLANNED</td>
<td>Work must be performed on a set fixed date: events, scheduled project work, planned PM outage, etc.</td>
<td>Within 3 days prior to due date</td>
<td>Set by supervisor</td>
</tr>
</tbody>
</table>

7. **Method**

Method field allows specifying if the work order is performed:

- **In-house** – indicates work performed by FM Crew
- **Contract** – indicates work performed by contractor/vendor
- **In-house/Contract** – indicates work performed by FM crew and contractor

8. **Assigned To**

Assigned To field allows user to view or assign the work order to a specific employee.
9. **Work Order Status**

*Status* field allows user to view/change the current work order status. Here is the list of Work Order statuses available in FAMIS and their definitions:

<table>
<thead>
<tr>
<th>WO Status</th>
<th>Active</th>
<th>Email Notification</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>ASSIGNED</td>
<td>Y</td>
<td>Y</td>
<td>Work order has been assigned to a specific employee</td>
</tr>
<tr>
<td>COMPLETE</td>
<td>Y</td>
<td>Y</td>
<td>Employee has reported to his/her supervisor that the work has been completed</td>
</tr>
<tr>
<td>OPEN</td>
<td>Y</td>
<td>Y</td>
<td>Work order is active and pending assignment after review by crew supervisor</td>
</tr>
<tr>
<td>REVIEW</td>
<td>Y</td>
<td>N</td>
<td>Work order requires further review to address some type of issue</td>
</tr>
<tr>
<td>EST SENT</td>
<td>Y</td>
<td>N</td>
<td>Quotes for work has been sent to customer</td>
</tr>
<tr>
<td>EST APPRVD</td>
<td>Y</td>
<td>N</td>
<td>Quote has been approved by the customer</td>
</tr>
<tr>
<td>EST RECV'D</td>
<td>Y</td>
<td>N</td>
<td>Quote has been returned back to crew supervisor</td>
</tr>
<tr>
<td>HOLD</td>
<td>Y</td>
<td>N</td>
<td>Work Order has been delayed for a reason</td>
</tr>
<tr>
<td>MAT RECV'D</td>
<td>Y</td>
<td>N</td>
<td>Material for a work order has been received into the work order. Materials are awaiting pick up from FASTENAL</td>
</tr>
<tr>
<td>WAIT MATRL</td>
<td>Y</td>
<td>N</td>
<td>Used to denote a work order cannot move forward until materials are ordered and received into the work order.</td>
</tr>
<tr>
<td>PARENT ONL</td>
<td>Y</td>
<td>N</td>
<td>Used to denote a work order that is used as a parent for holding information on long term work orders</td>
</tr>
<tr>
<td>RET-SERV</td>
<td>Y</td>
<td>N</td>
<td>Used by AUTO SHOP to denote a vehicle has been returned to service.</td>
</tr>
<tr>
<td>CANCELLED</td>
<td>N</td>
<td>N</td>
<td>Work order is cancelled. Work will not be performed. If the crew or call center cancelled the work order, the customer must be notified with an explanation.</td>
</tr>
</tbody>
</table>
Supervisor has reviewed the work order for completeness and no further action is required. All billable charges may be released.

10. Dates of Work Order

Here is the list of Date fields in Work Order form and their definitions:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Start Date</td>
<td>Date the work is scheduled to begin. Did not change with Priority Code, defaulted to the date the service request is converted to the work order. Can be changed by user.</td>
</tr>
<tr>
<td>Due Date</td>
<td>Calculated based off the Priority Code. Date the work is due to be finished. Can be changed by user.</td>
</tr>
<tr>
<td>Completed Date</td>
<td>Date the actual work was completed. This date will be filled in automatically when Status is set to COMPLETED.</td>
</tr>
</tbody>
</table>

11. Crew

**Crew** – allows you to select a crew to perform work order; every work order must have an assigned crew

12. Craft

**Craft** – allows you to select a craft or skill required for work order

13. Crew Size

**Crew Size** – minimum crew size to perform the work order

14. Est Hrs/Current Est Hrs

**Est Hrs/Current Est Hrs** - allows you to enter an estimate number of hours needed for crew to perform the work/Current Est Hrs allows you to enter up-to-date estimate of hours needed to perform work order

15. Work Order location (site, building, floor, room)

**Site** – site work order needs to be performed in

**Building** – building the work order needs to be performed in
Floor – floor in building

Room – room in building work order needs to be performed in

16. Attachments (Notes, Documents, E-mail)
   Notes – allow you to view the existing notes or create new notes for the current work order
   Documents - allow you to view the existing files or attach new files for the current work order. The files could be in Word, Excel, PDF, or images.
   E-mail - allow you to view the existing email sent from current work order or send new email to users/customer from current work order

17. Work Order Ticket
   Allows you to print out detail information about the current work order

18. Buttons
   Library – allows you to transfer a procedure library to the work order
   Request – allows you to enter work order requestor information
   Related WO – allows you to view parent and children work orders of current work order
   Create WO – allows you to create a child work order of the current work order
   Billing – allows you to view/enter work order billing information
   Estimates – allows you to view/enter and calculate work order estimates
   Dates – date work order was scheduled
   Conv. To Project – allows you to convert work order to project

19. Task List of a Work Order
   Tasks Tab allows you to enter list of Work Order tasks and procedures under Tasks List. These details will print with Work Order Report
20. **PO’s tab**

PO tab in Work Order form help you view/create purchase requisition for the current Work Order.

1. Click on PO’s tab
2. Click Orders button
3. Click here
4. Choose PREQ line
5. Click view button
Routing tab displays the routing history of the work order; a record is automatically added to the routing history whenever the status of a work order is changed or the person assigned to the work order.

The routing tab displays:

a. **Date** – displays data and time of routing change
b. **User** – displays the User ID of the person who made the change
c. **Assigned To** – displays the Employee ID of the person now assigned to the work order
d. **Status** – displays status of work order at specified date
e. **Comments** – enables you to type comments about routing change
Materials

Planning Material for a Work Order
This feature allows you to plan and purchase materials required for a Work Order.

Open specific Work Order form and navigate to the Parts tab
**Parts Tab** allows you to enter list of parts and material required to perform Work Order for planning purposes.

**NOTE:** The following manual shows how to add part to a Work Order for planning purposes only. It means that **no Purchase Order is made**. In order to purchase, please refer to the **shopping cart manual** right after this section.

1. Click ‘…’ to view and select parts
2. The **Item Number ‘...’** invokes the window below, allowing you to search, view and select parts in four different ways:

   i. **By Part** – this tab displays all parts; query to search for specific part
       a. All parts displayed here
ii. **By Category** – in this tab, parts are designated into categories; select specific category and then find part.
   a. Categories of parts displayed here
   b. Specific parts displayed here
iii. **By Manufacturer** – this tab lets you search for a part by its manufacturer
   
a. Click ‘...’ to view list of manufacturers, click OK after selecting a manufacturer
   
b. Press Find button
   
c. Select from newly displayed list of parts
iv. **By Vendor** – this tab allows you to search for a specific part by its vendor
   a. Click ‘…’ to view list of vendors, click OK after selecting a vendor
   b. Press **Find** button
   c. Select from newly displayed list of parts
Inventory Purchase with Shopping Cart feature

To finally purchase parts, select desired parts by checking box on the right and click OK; in this case we have 4 parts selected.
3. Clicking OK returns you back to the Parts tab in the Work Order form; you may use parts for planning purposes or purchasing.
   i. **View** button allows you to view additional information about the selected part
   ii. Parts for planning purposes
   iii. Parts to be purchased; **Pick** box checked on the left
       a. To purchase, check the Pick box, and press Create Cart button; this button invokes a new Shopping Cart window
4. View details in the Shopping Car, such as the WO Number, Quantity details, Selling Price, name of Requestor, Status; when ready to proceed, press the **Check Out** button

<table>
<thead>
<tr>
<th>Item #</th>
<th>Qty.</th>
<th>Description</th>
<th>Qty. in Stock</th>
<th>Qty. Available</th>
<th>Selling Price</th>
<th>Stock Room</th>
</tr>
</thead>
<tbody>
<tr>
<td>435-038</td>
<td>1</td>
<td>PIVOT Hinge, Straight End</td>
<td>95</td>
<td>95</td>
<td>$4.86</td>
<td>STORES</td>
</tr>
<tr>
<td>800-030</td>
<td>1</td>
<td>1% Hydrocortisone Part#005</td>
<td>99</td>
<td>99</td>
<td>$10.76</td>
<td>STORES</td>
</tr>
</tbody>
</table>

Total: $15.62

5. Enter **Delivery Instructions** and **Pickup Date**; press Continue button to proceed

6. Review information; Press **Edit Cart** to make changes if necessary or press **Submit** to purchase materials/parts

7. Submitted information will reflect in Work Order form in the Parts tab under Shopping Carts.
Time Card Entry

The Labor Timecard form allows you to enter labor transactions that are charged a work order; labor can only be charged to an open work order.

To open the labor timecard form, double click Labor Charges under Labor in the main menu
Labor Timecard Form details

a. Enter Employee ID, employee name will automatically fill in

b. Enter Work Date

c. Enter WO Number of work order performed

d. Enter Hours worked on work order for the day

e. Enter Shift number

f. Check Work Done check box

All other fields will automatically fill in.

g. Labor status has default value of “ENTERED” when the labor charges are initially entered.
   When you Save and Approve, the status will change to “E APPROVE”. When the Supervisor approves, the status will change to APPROVE. If supervisor rejects timecard, the reason for rejection will be displayed under Labor Status.

h. Press Save and Approve button when done, this sends timecard information to supervisor for approval
Adding Time for Route Work Orders

1. Go to the Labor Timecard form
2. Enter Employee number
3. Enter Work date
4. Click on Route Work Order button
5. Enter the parent WO number of the Route
6. Click Find button
7. Enter total number of hours the employee worked on the route
8. Click OK button
**Supervisor Labor Approval**

This form allows the supervisor to approve Employee Labor Timecard; to open, double click on Supervisor Labor Approval under Labor in the main menu to open form.
1. To approve Employee labor, select **Unapproved Timecards**
2. Select the date labor was performed
3. Select **Supervisor**(your) name
4. Click on desired employee from the **Employees** list
5. Select the employee approved labor; labor status will be **E APPROVE**
6. Click **Go To Approval** if information is correct or click **Edit** to edit employee labor timecard (both buttons will invoke new windows, displayed below):
6.a) **Go To Approval** button on the Supervisor Labor Approval form invokes the window above. Select Approve or Reject employee labor timecard after reviewing information.

6.b) **Edit** button invokes the window below. This takes the supervisor to the employee labor timecard and allows to edit it.
Correct Time Card Entry

Each labor time entry has a status, either E Approve (Employee Approve) or S Approve (Supervisor Approve)

If your time entry is in E Approve Status, you can modify it:

First, Enter employee id and date of work

Then change the time, put a 0 if you want to delete it
If your time entry is in **S Approve Status**, you need to add another time entry with a negative value:

Add the new line with a negative time entry
Work Order Cost

In order to keep track the cost of work orders, we need to use the Work Order Cost Summary form. There are two ways to access the Work Order Cost Summary:

1. Double click on **Work Order Cost Summary form** in Work Order folder then **search** for a **Work Order** number
2. Right click on a **WO Number** in **Work Order form** then choose **Cost Summary**...
Right click on the WO number then choose Cost Summary
Overview of Parts Management

Creating Parts

1. Go under the “FIC FORMS” folder
2. Go under the “Part Management” folder
3. Double click on the “Part” form
4. Fill in yellow required fields.
5. Hit Save.
Adjusting Quantity and Price

1. Go under the “FIC FORMS” folder
2. Go under the “Part Management” folder
3. Double click on either “Price Adjustment” or “Quantity Adjustment”

4. For Price Adjustment Form”, enter Part Number, Adj Type, and New Price

5. For Quantity Adjustment Form”, enter Part Number, Adj Type, and New quantity
Issue Parts to Work Order

Step 1: Go to the Item Issue form under Stores -> FIC Forms -> Issues & Returns -> Item Issue
Step 2: Enter the PeopleSoft Number of the employee you are issuing the parts to under the Issued To field. Enter Work Order number in WO Number field, and then click on the Item Code fields. Enter the Part Numbers needed for the Work Order:
Step 3: enter the quantity issue to the Qty Issue field, then click OK, FAMIS will give the ISSUE number for the Work Order, you can take note it:
Overview of Non-inventory purchasing process

Non Stock FMFA Quote/Materials Request Process Map

- Shop submits Material Request Form for quote to PDME/FNL
- PDME/FNL creates and submits quote to Shop for approval
- Shop reviews, approves, and submits quote for purchase

- If Yes PDME/FNL procures product. See PDME/FNL Work flow
- If No PDME/FNL notifies requestor and passes order to FMFA.

- FMFA creates FAMIS Non-stock item number
- FMFA creates FAMIS PO
- FMFA processes order from selected vendor
- FMFA notifies requestor of order status
- Vendor ships product to UH Stores
- FMFA inputs invoice detail to complete the FAMIS Generated PO
- FMFA receives parts from FAMIS PO into Stores Warehouse
- Business Services & Accounts payable approves P-SOFT Invoice Voucher
- FMFA scans and attaches all supporting documents to FAMIS Purchase Order
- FMFA creates P-SOFT Invoice Voucher & submits to P-SOFT workflow
- FMFA notifies requestor of order status & requestor takes possession of materials

FMFA: Financial Management & Analysis
PDME: Purchasing & Materials Management
P-SOFT: Purchasing System
UH: University Hospitals
FAMIS: Financial Administration Management Information System
Create FAMIS Non-Stock Stock Part

1. Double Click on Part form under FIC Forms → Part Management → Part
2. Leave the first field blank and let FAMIS assign a Part number, click on the second field to enter a brief description of the part. This brief description cannot exceed 60 characters
3. Click on button next to Category to choose a Category for the part then click OK button
4. Click on button next to Commodity to choose a Commodity for the part then click OK button
5. Choose a Unit of Measure
6. Choose a Unit of Purchase
7. Click on next to Status and choose “ACTIVE” then click OK button
8. Click on next to Type and choose “Non-Stock” then click OK button
9. Enter the long description for the part
10. Click on “Accounts” tab on the side. Select “Part Warehouse Acct Group”. Click on the “Accounts” button. Enter “17959” as the Speed Type. Finally, click the OK button.
11. Click Save button then make note of the part number that is created by FAMIS.
Create FAMIS Purchase Order (PO)

1. Double click on Purchase Orders under FIC Forms → Purchasing → Purchase Order
2. Enter the description for this Purchase Order
3. Click on button next to Supplier, Choose a Supplier then Click OK button
4. Choose NON_INVEN in Purchase Type dropdown box
5. Click on button next to Requester and choose the requester of this PO
6. Click on Lines tab. Make sure the new window title contains the line number.
7. Click on button next to Item field and choose the part number that has just created.
8. Enter the Work Order number
9. Enter quantity
10. Enter Unit Price
11. For Recoverable Crews, click on Accounts tab on the buttom. Select “PO Purchase Acct Group”. Click on the “Accounts” button. Enter Crew’s Cost Center. Finally, click the OK button.
12. Click OK Button
13. Repeat the step for the next line item if needed.
14. Go back to General Tab
15. Change the Status from OPEN to PLACED
16. Click on “Documents” under “Attachments” to Upload any document regarding to the PO
   a. Click on New
   b. Enter the Type(Usually PDF), Description, and Browse for the Document.
   c. Press OK.
   d. Click the “Save” button
   Note: The Filename for the document can only be 20 characters long with no special characters.
17. Click Print… to change Line Item(s) to PLACED.
   Note: Line item status and PO status must be in PLACED before item can be received.
Receiving Item in FAMIS

1. Double click on Receipt of Item by PO under FIC Forms → Receiving & RTV
2. Enter the PO Number
3. Check the All checkboxes
4. Click OK Button
5. Click Print button to Print receipt or click Cancel button
Input an Invoice into FAMIS

1. Go to Invoices form under FIC Forms → Invoices → Invoices
2. Enter the PO number, then press Enter button
3. Enter Voucher number
4. Enter Total Invoice Pre-tax Amount
5. Click Save button
6. Click on Line Items tab
7. Check the Balance to be itemized and make sure it is equal to 0
Return Parts to Vendor (RTV)

Use the Return to Vendor form to return materials to the vendor from which they were received. In most cases, the storeroom personnel will be the ones initiating a return to the vendor.

1. Go to the Return to Vendor form under FIC Forms → Receiving & RTV → Return to Vendor
2. Enter the PO number
3. Fill out Shipping Information as needed.
4. Fill out Return Information
5. Under Line Items, enter in the part number into the Part Number Field.
6. To return parts, enter the number of items to return under the Returning (UM) field. (May need to scroll to the right to see this information.)
7. Hit the Save button.
Recording P-Card Purchases

a. Open the Credit Card Invoices form
b. PO Number – select the PO for the P-Card holder (each card holder will have a local and state PO)
c. Supplier a. Select the vendor b. If the vendor is not in PeopleSoft, the dummy vendor may be used
d. Select the purchase site (typically 1)
e. Input invoice number – input the month and year for the P-Card purchases being recorded
f. Select the crew
g. Enter the WO Number for each line
h. Enter a description
i. Enter the amount
j. Press Save
k. To verify, view the Work Order Cost Summary form and select the invoices tab