FAMIS TRAINING
for
FIX-IT CALL CENTER
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Overview of Service Request – Work Order Workflow in FAMIS

Customer inputs Service Request using FAMIS Self-Service

Service Request waits for approval, SR status is now "WAIT APPR"

Is it BILLABLE?

Yes

SR is approved. SR's status is changed to "APPROVED"

Technicians purchase materials from FASTENAL as needed

Labor Hours are inputted into WO

Work Order is complete

Labor Hours are approved by Supervisor

No

SR is declined. SR's status is changed to "DECLINED"

Does Certifying Signature approve SR?

Yes

SR is approved. SR's status is changed to "APPROVED"

The crews' supervisor assigns technicians to complete the work order

Call Center converts SR to Work Order by changing SR status to "SCHEDULED"

Call Center verifies and updates appropriate information on SR

Call Center inputs Service Request from customer calls/emails/texts
Log-in to 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
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 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.
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.

### Service Request Information

<table>
<thead>
<tr>
<th>Request Number</th>
<th>SR123456</th>
</tr>
</thead>
<tbody>
<tr>
<td>Requestor PSID</td>
<td>1234567</td>
</tr>
<tr>
<td>Request Status</td>
<td>Select...</td>
</tr>
<tr>
<td>Speed Type</td>
<td>12345</td>
</tr>
<tr>
<td>Maintenance Type</td>
<td>Select...</td>
</tr>
<tr>
<td>Crew</td>
<td>Select...</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>Search Criteria</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Location:</strong></td>
</tr>
<tr>
<td>Site ID:</td>
</tr>
<tr>
<td>Building:</td>
</tr>
<tr>
<td>Floor:</td>
</tr>
<tr>
<td>Room:</td>
</tr>
<tr>
<td><strong>Start Date:</strong></td>
</tr>
<tr>
<td>From:</td>
</tr>
<tr>
<td>To:</td>
</tr>
</tbody>
</table>

[Submit Query] [Clear] [Create New]
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.
**Previous and Next Buttons**

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>SR438008</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.

<table>
<thead>
<tr>
<th>Location Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Site: 00730</td>
</tr>
<tr>
<td>Building Number: 0493-Cougar Softball Stadium</td>
</tr>
<tr>
<td>Floor: Select an...</td>
</tr>
<tr>
<td>Room: Select an...</td>
</tr>
<tr>
<td>Department: H0002</td>
</tr>
<tr>
<td>Zone: AUX</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>General Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Service Request Number: SR434892</td>
</tr>
<tr>
<td>Description: TRANSFORMER BURNT OUT BEHIND SOFTBALL FIELD</td>
</tr>
<tr>
<td>Maintenance Type: CORRECTIVE</td>
</tr>
<tr>
<td>Method:</td>
</tr>
<tr>
<td>Priority: 3</td>
</tr>
<tr>
<td>Crew: ELECTRICAL</td>
</tr>
<tr>
<td>Craft:</td>
</tr>
<tr>
<td>Assigned To:</td>
</tr>
<tr>
<td>Service Request Status: WAIT APPR</td>
</tr>
<tr>
<td>Submittal Method: Phone</td>
</tr>
<tr>
<td>Start Date: 29-MAR-18</td>
</tr>
<tr>
<td>Due Date: 22-MAY-18</td>
</tr>
</tbody>
</table>
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%

---

**Billing Type**

<table>
<thead>
<tr>
<th>Billing Type:</th>
<th>CHARGE</th>
</tr>
</thead>
</table>

**Cost Center(s)**

<table>
<thead>
<tr>
<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>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>00730</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>100</td>
<td>Clear</td>
</tr>
<tr>
<td></td>
<td>00730</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>100</td>
<td>Clear</td>
</tr>
<tr>
<td></td>
<td>00730</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>100</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

3. Enter PSID of requester and click the look-up button
4. Enter Location Information and Work Order Description section.

**Location**

- **Site:** Required
  - Select...
- **Bldg:** Required
  - Select an Option...

**Work Description**

- **Work Title:** Required
- **Description of Work:**
- **Maintenance Type:** Required
  - Select...
- **Priority:** Required
  - Select...
- **Status:** Required
  - Select...
- **Crew:** Required
  - Select...
- **Craft:**
- **Earliest Start Date:** 12-May-2018
- **Latest Completion Date:** 12-Jun-2018

**Billing**

5. Enter Billing information.

**Billing**

- **Billing Type:** Required
  - Change
- **Enter Speed Type:**
  - Percentage (%):
  - Business Unit: 00736
  - Fund Code: ****
  - Department ID: 13****
  - Program: 5****
  - Project ID: 6****
  - Percentage (%):
- **Enter Speed Type 2:**
  - Percentage (%):
  - Business Unit: 00736
  - Fund Code: ****
  - Department ID: 13****
  - Program: 5****
  - Project ID: 6****
  - Percentage (%):
- **Enter Speed Type 3:**
  - Percentage (%):
  - Business Unit: 00736
  - Fund Code: ****
  - Department ID: 13****
  - Program: 5****
  - Project ID: 6****
  - Percentage (%):

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

| Key Admin Test | Key Audit | Key Entry | WO Error Report | WO Workbench |