UNIVERSITY of HOUSTON

FACILITIES SERVICES

FAMIS Desk Reference Manual

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Overview of Service Request – Work Order Workflow in FAMIS

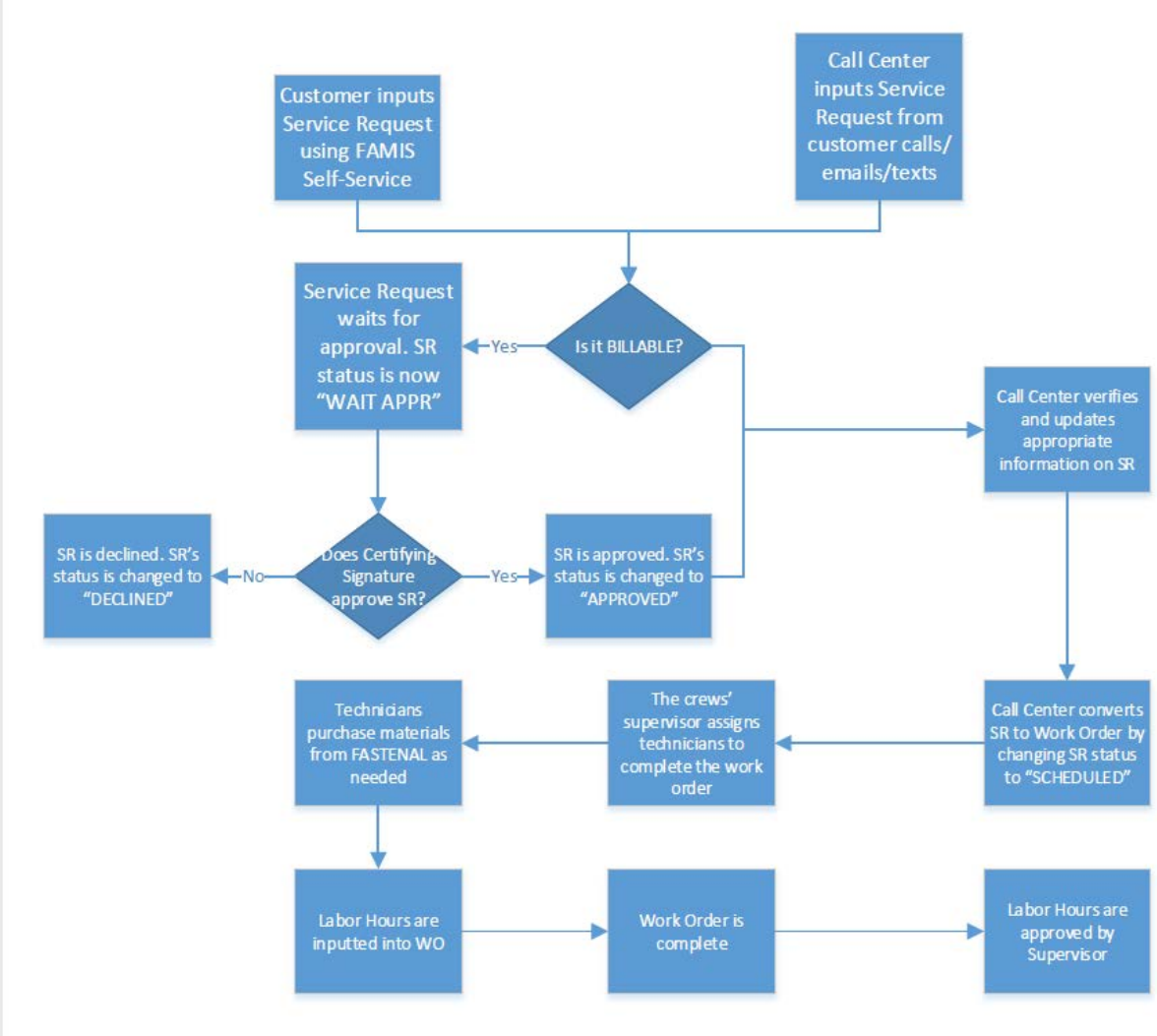
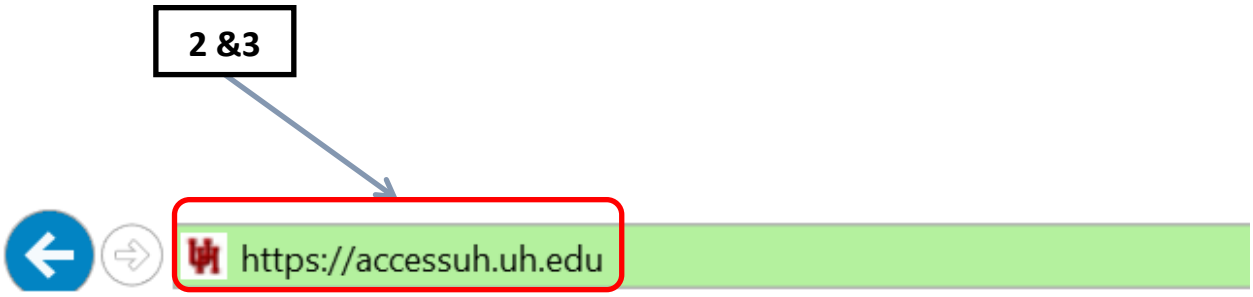


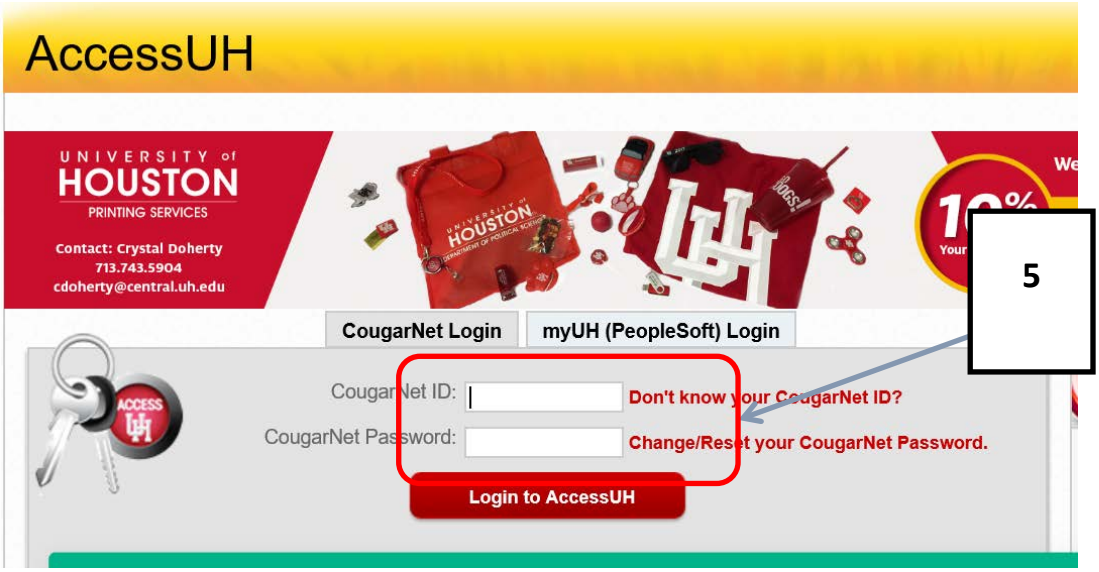
Figure 1 Work Order Workflow

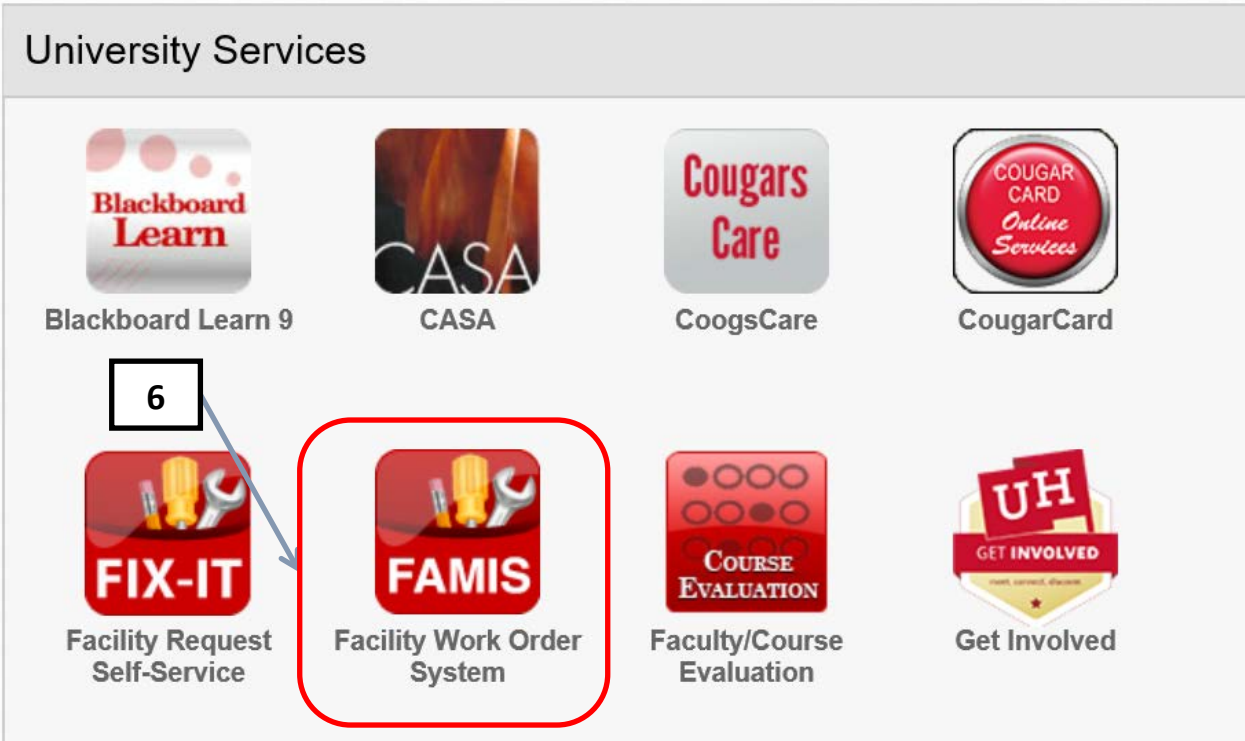
Logging into FAMIS

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




AccessUH
UNIVERSITY of HOUSTON
PRINTING SERVICES
Contact: Crystal Doherty
713.743.5904
cdoherty@central.uh.edu
CougarNet Login
myUH (PeopleSoft) Login
CougarNet ID:
CougarNet Password:
Don't know your CougarNet ID?
Change/Reset your CougarNet Password.
Login to AccessUH
5

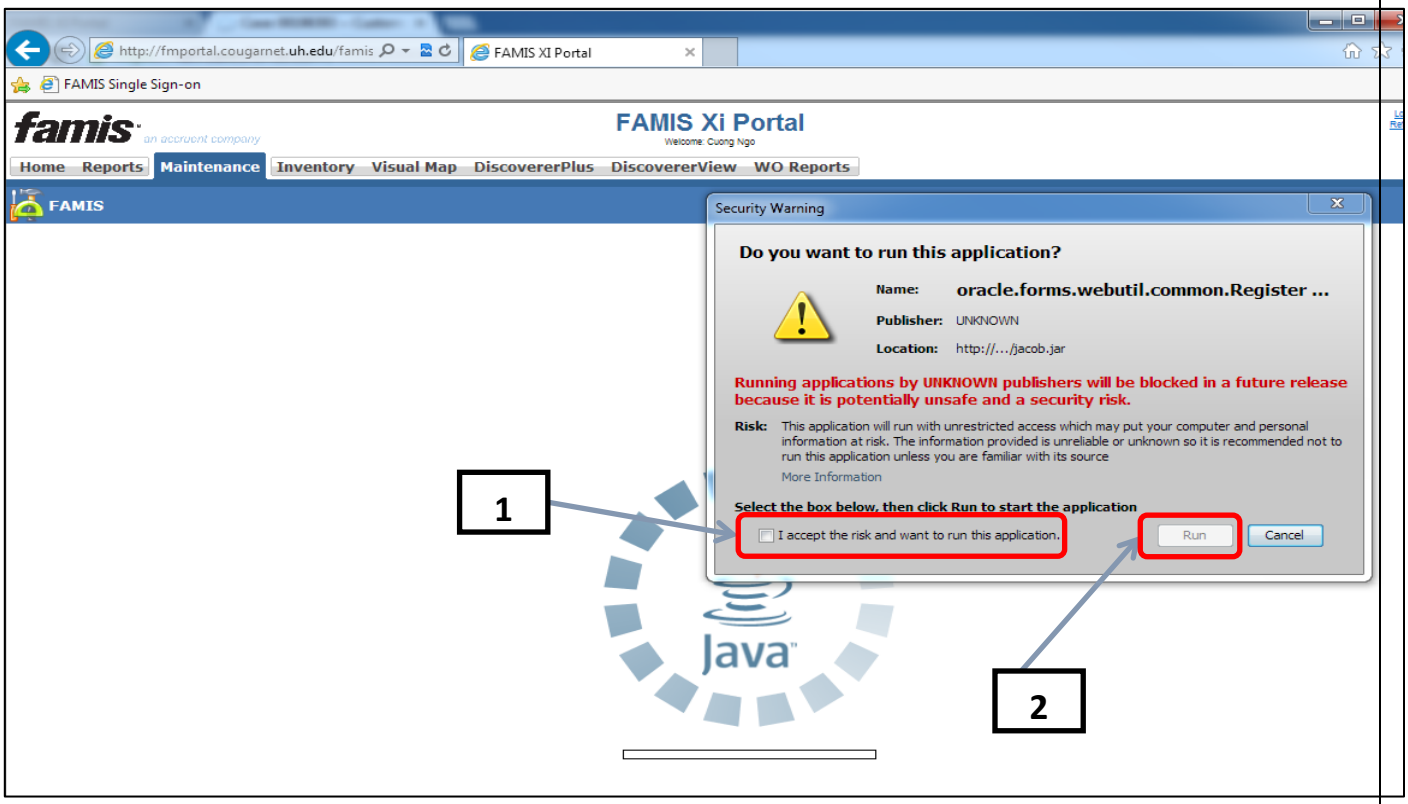

University Services
Blackboard Learn 9
CASA
CoogsCare
CougarCard
6
Facility Request Self-Service
Facility Work Order System
Faculty/Course Evaluation
Get Involved


7
famis
Home
FSC
Reports
Portfolio
Maintenance
Inventory

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***

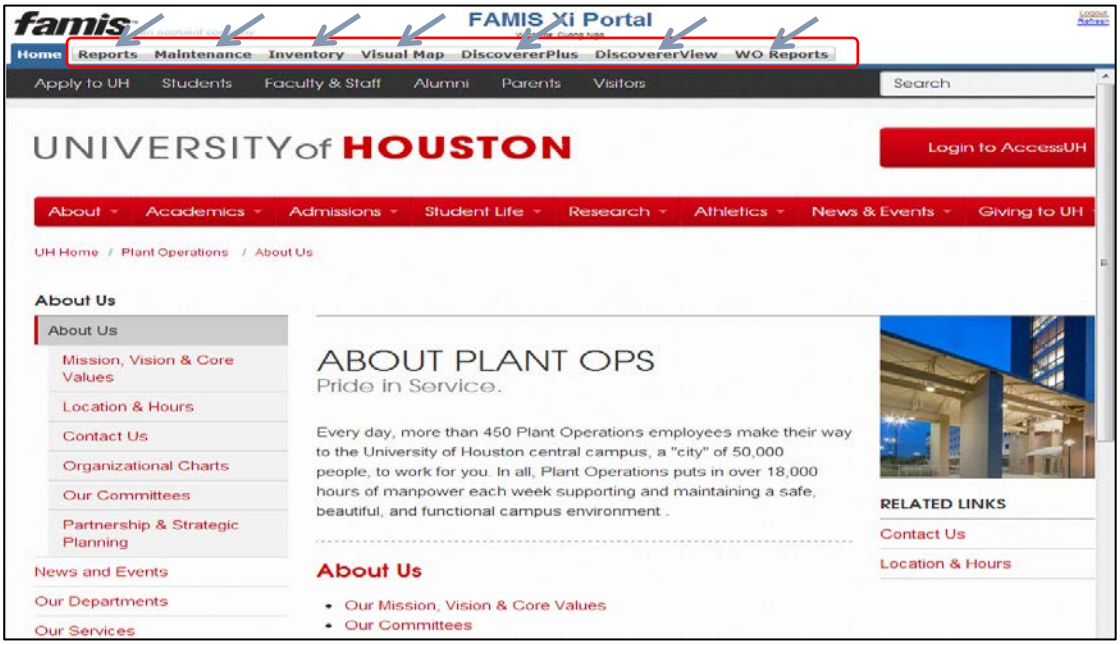


Select a Tab

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:

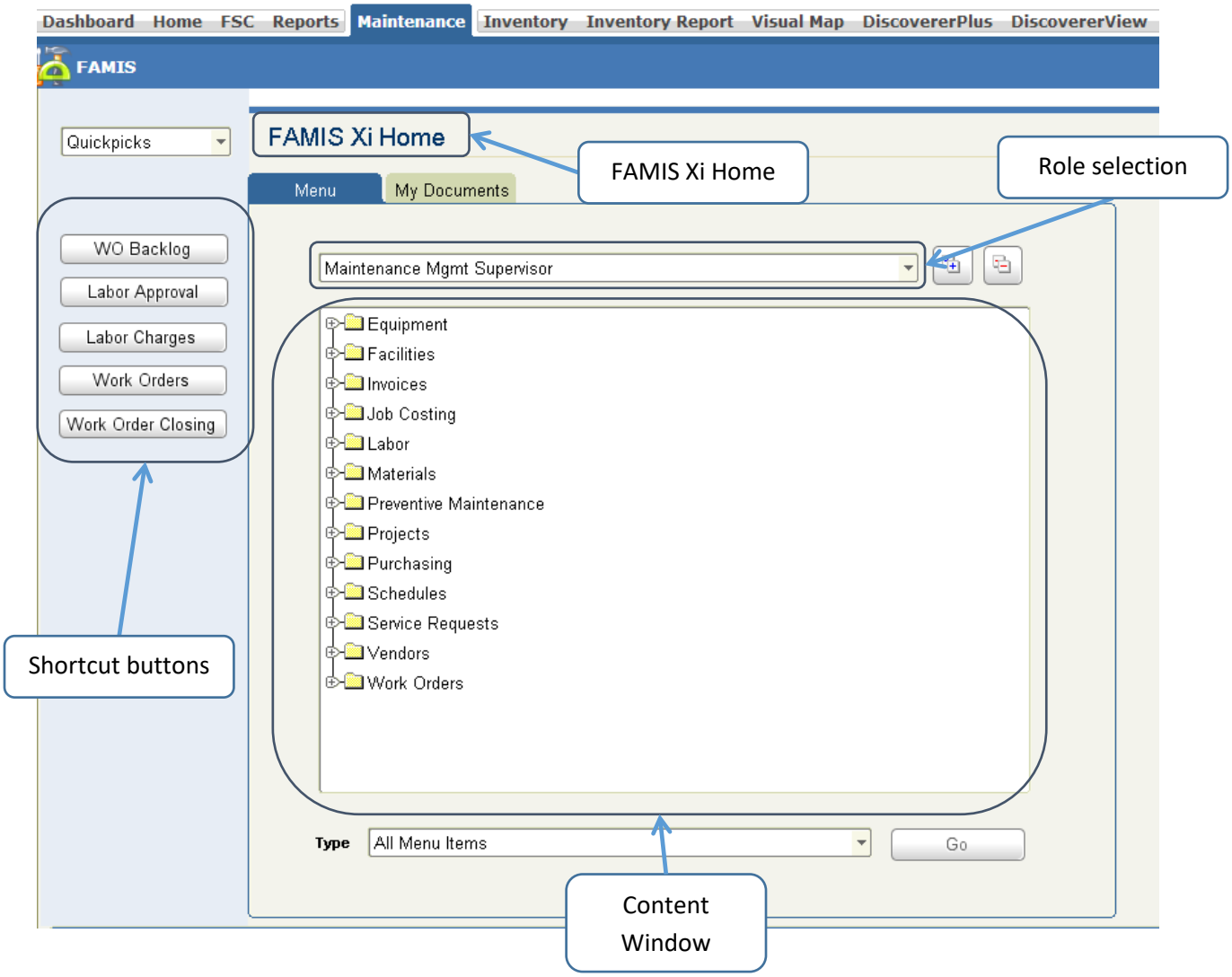


FAMIS Home Screen:

FAMIS Home Screen can be identified by "**FAMIS Xi Home**" right under the tabs

FAMIS Home Screen includes 3 main parts:

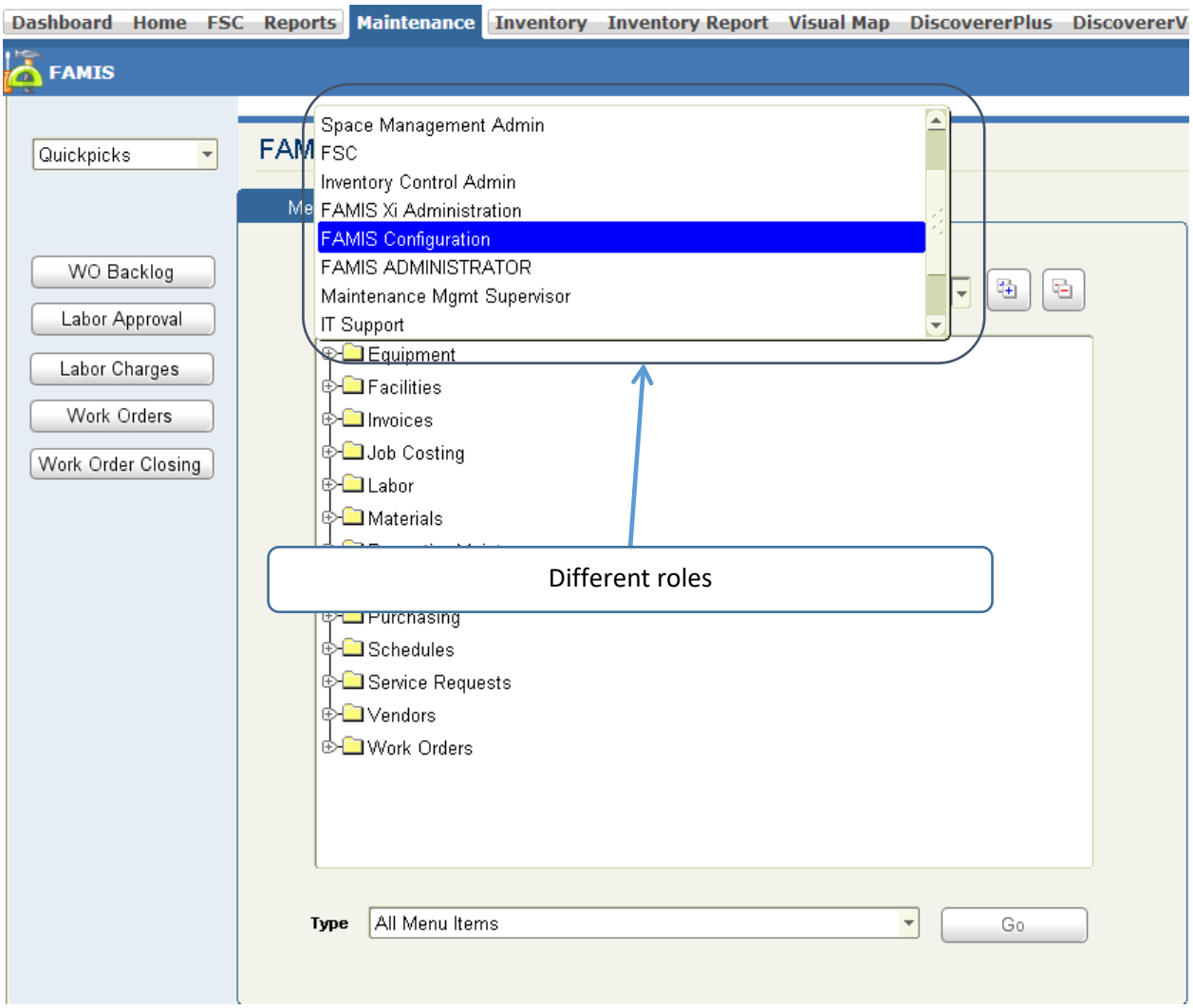
1. **Role selection**
2. **Content window**
3. **Shortcut buttons**



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

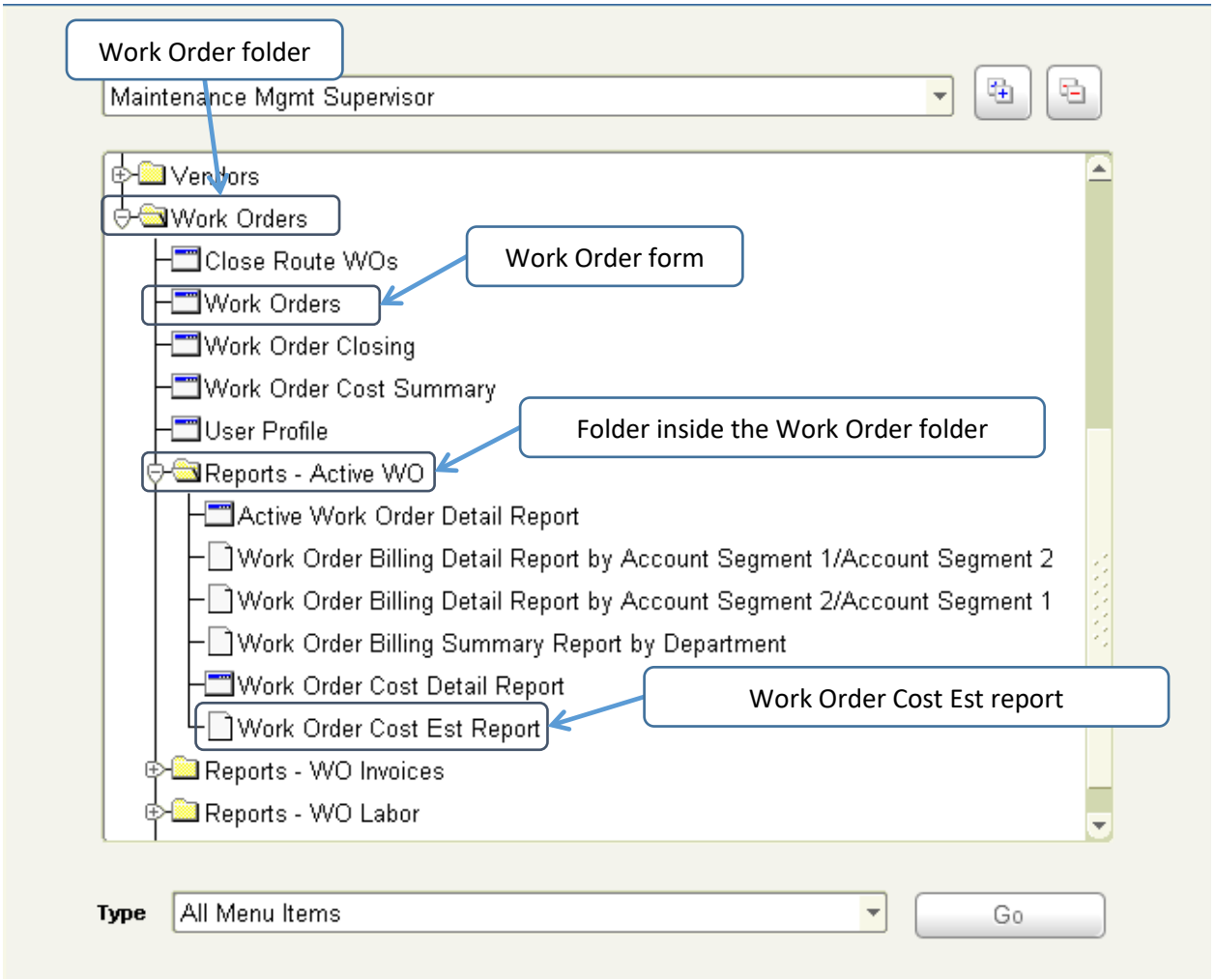
A folder's icon is represented by this symbol . Each folder can be expanded when you click on the "plus sign" on the left of the yellow icon. Each folder has forms and reports that relate to the folder name. For example, the Work Order folder will include Work Order form, Work Order reports, etc.

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

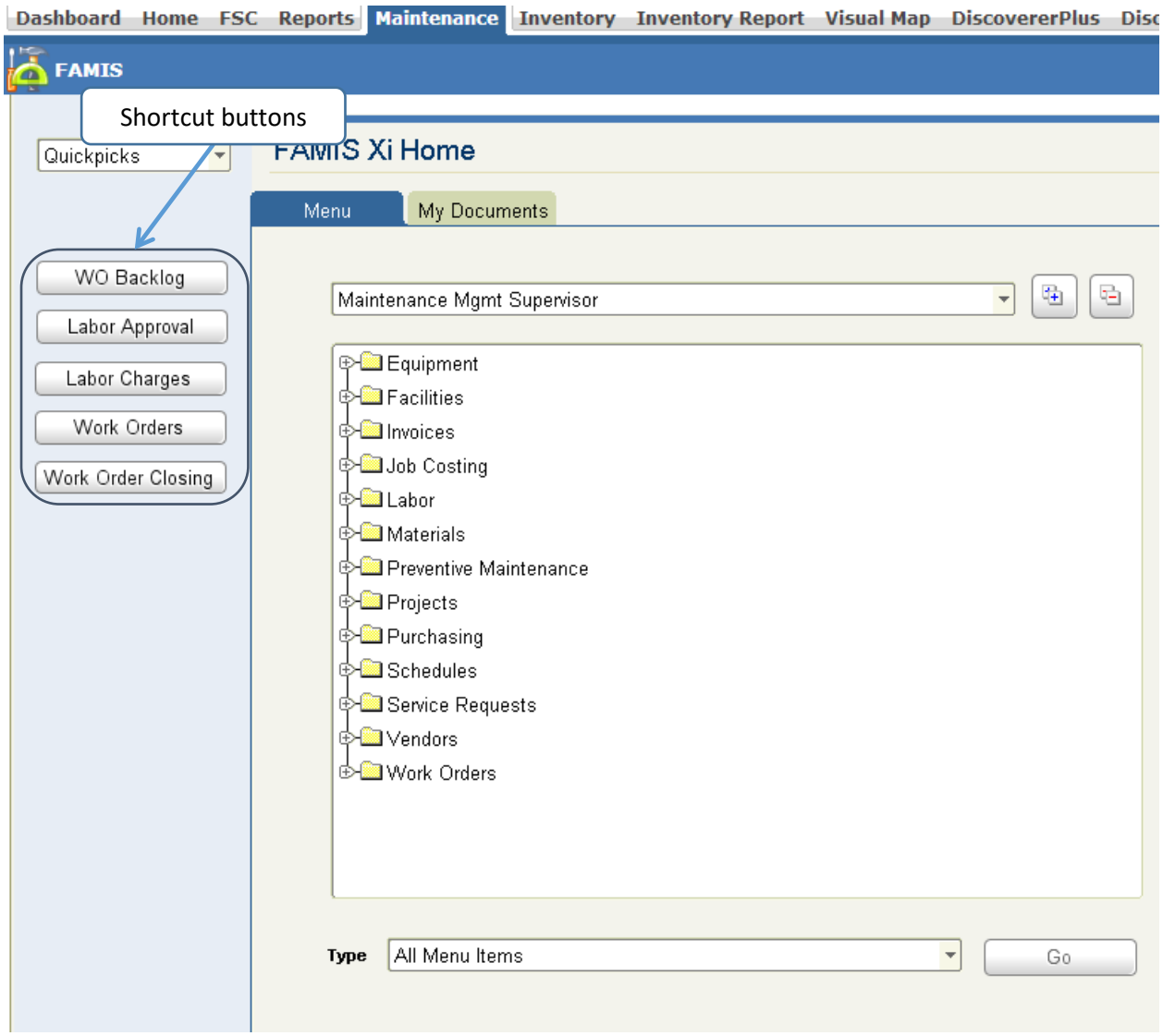
A report's icon is represented by this symbol . Each report will show information related to the name of the report. Double click to the report to open the report.



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.

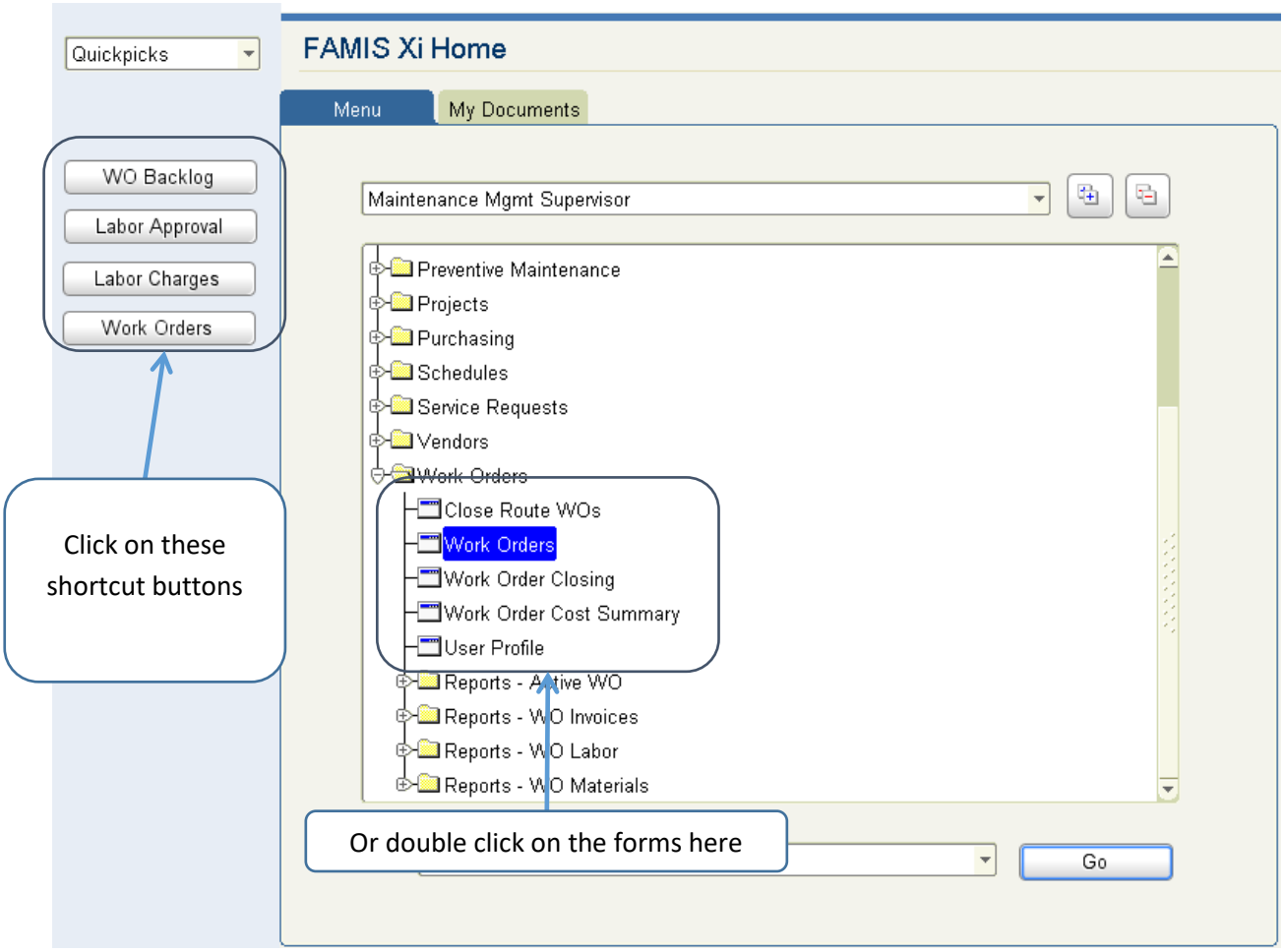
Click on a button to go to that form.



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:



Navigation Bar functions

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

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

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:

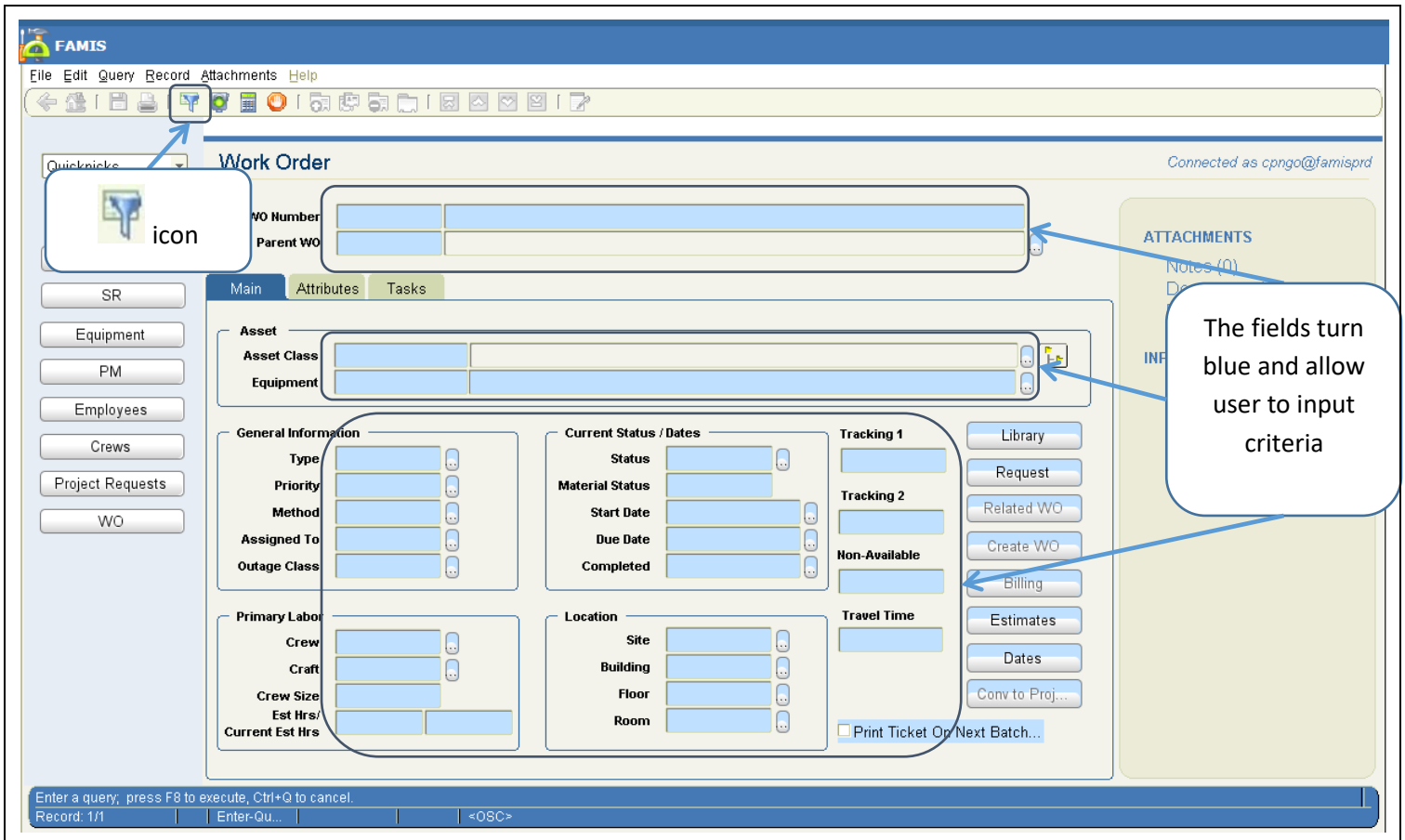
You give criteria	You get
Work Order Number (e.g., WO123456, WO290830)	Work Order detail information, cost information
• **Your peoplesoftID = 1234567** • **Start date = MON APR 28, 2014**	All work orders assigned to employee that have peoplesoftID = 1234567 and the start date is MON APR 28, 2014
• **Crew name = HVAC** • **Building = 0585** • **Status = OPEN**	All work orders that are assigned to HVAC, have the status of OPEN, and locates at that Building 0585

Start the search function:

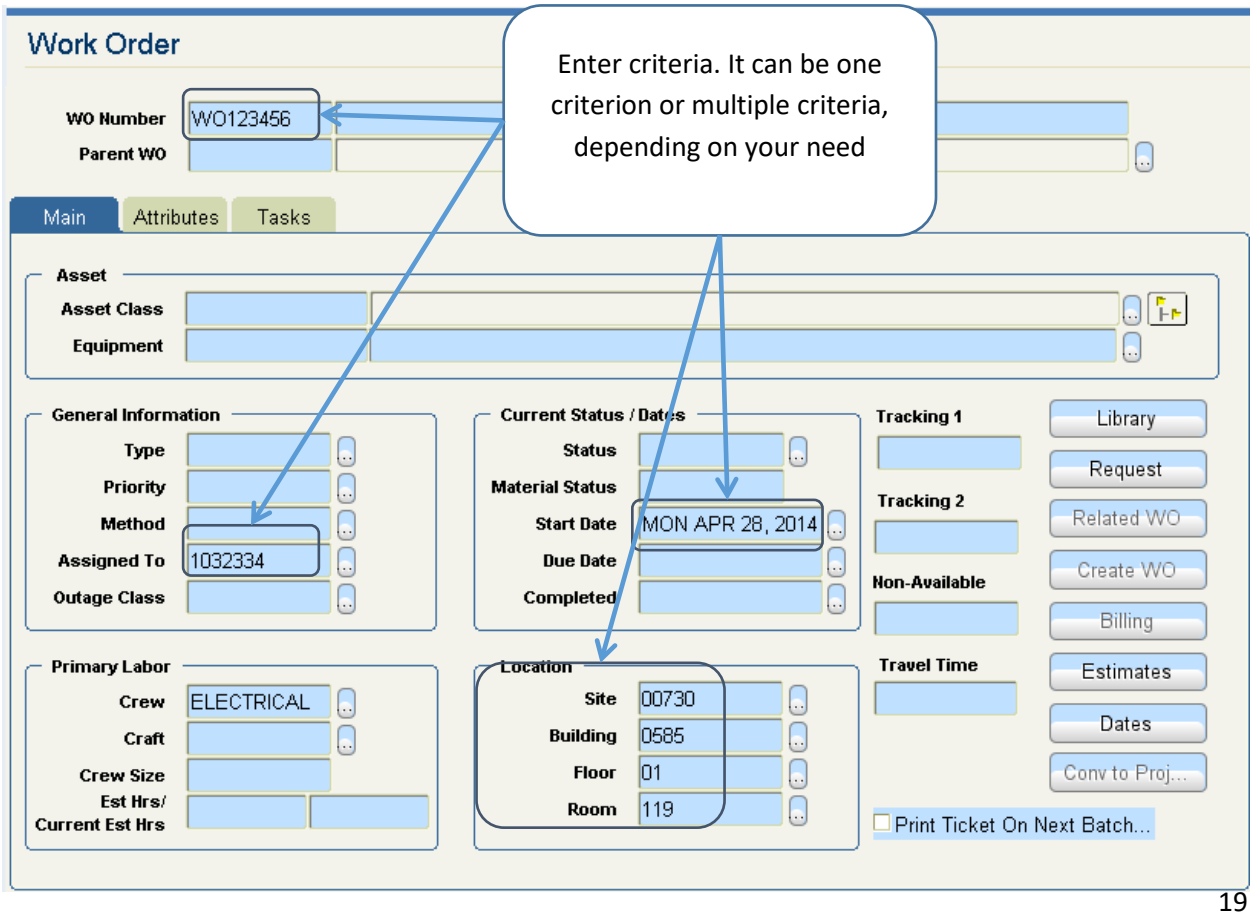
There are two ways to start a search:

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):



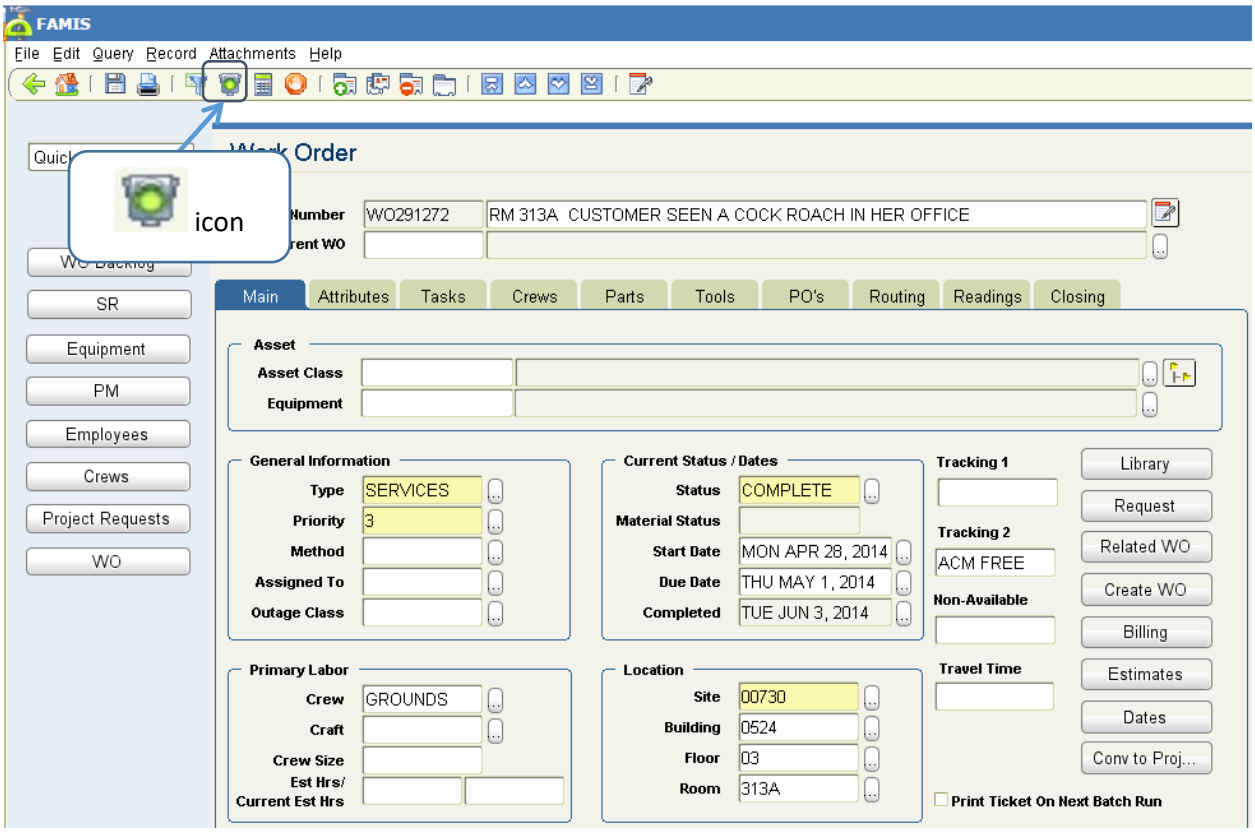
Enter your criteria



Execute your search

There are 2 ways to execute your search:

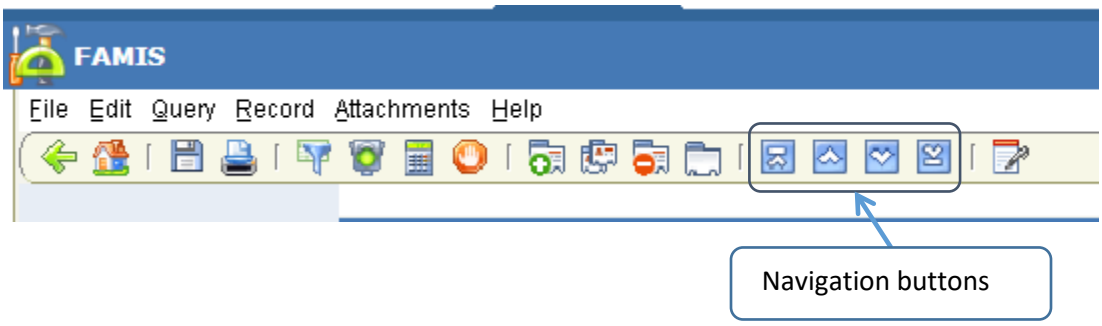
1. Click the  icon on the navigation bar
2. Press **F8** on the keyboard



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: **%** .

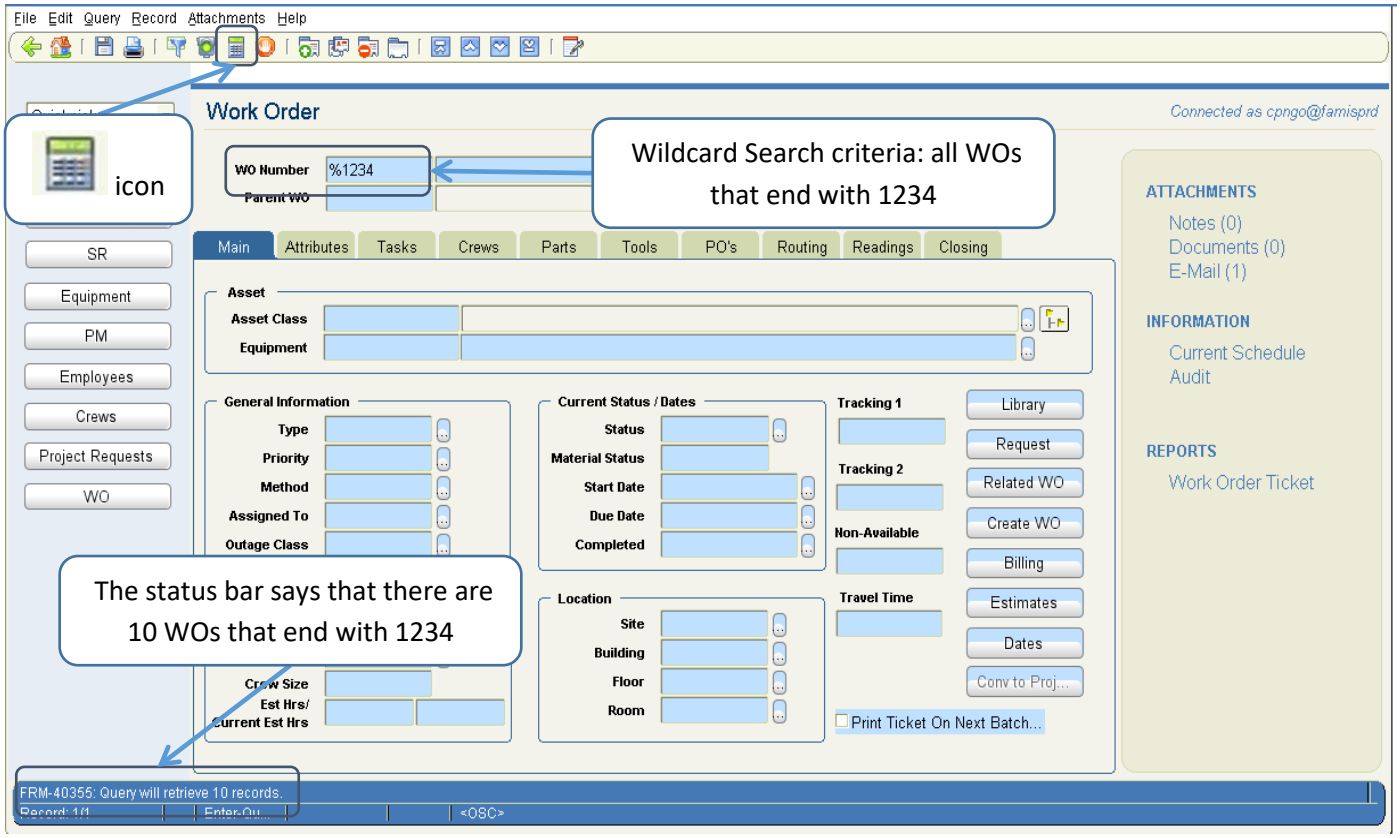
The percent sign will replace any leading or ending missing characters.

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/

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:

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

Crew

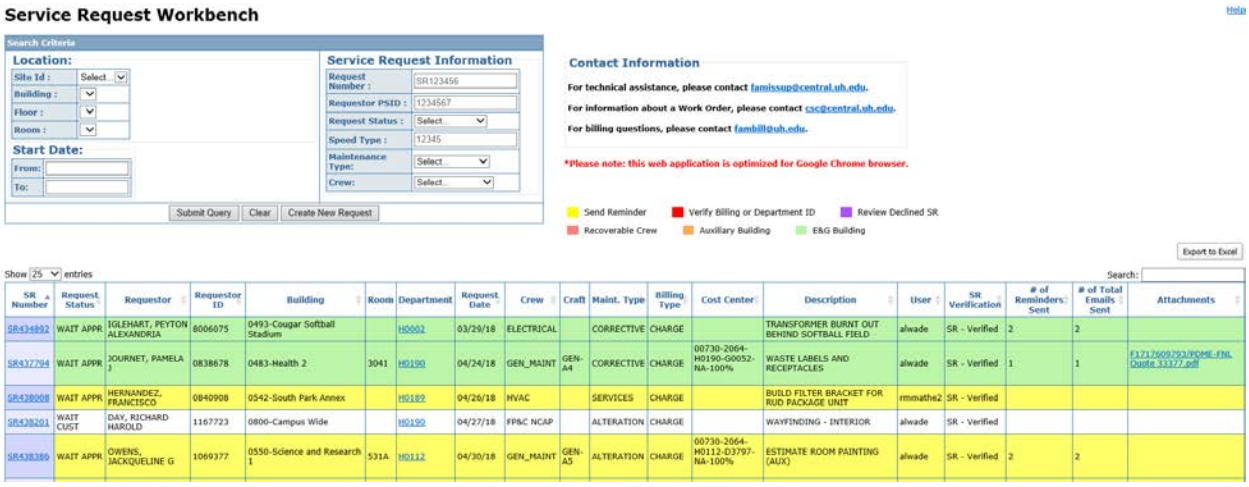
List of available crews in FAMIS:

Crew Name	Description
AUTO SHOP	AUTO SHOP
BMS	BMS CREW
CUSTODIAL	CUSTODIAL CREW
ELECTRICAL	ELECTRICAL CREW
ELEVATOR	ELEVATOR CREW
F/CM-IT	F/CM-IT CREW
FIRE ALARM	FIRE ALARM CREW
FP&C NCAP	FPC CREW
GEN_MAINT	GENERAL MAINTENANCE CREW
GROUNDS	GROUNDS CREW
HVAC	MECHANICAL & DISTRIBUTION CREW
INSPECTION	INSPECTION CREW
LAB SERV	LAB SERVICES CREW
LOCK SHOP	LOCK SHOP CREW
METROCLEAN	METROCLEAN CREW
MIC	MINOR IN HOUSE CONSTRUCTION
MOVES & EV	MOVES & EVENTS CREW
PEST CONTL	PEST CONTROL CREW
PLAN MAINT	PLANNED MAINTENANCE CREW
PLANNING	PLANNING CREW
PLANT	CENTRAL PLANT CREW
SOLID WAST	SOLID WASTE CREW
WARRANTY	WARRANTY SHOP

Service Request Workbench

Overview

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



SR Number	Request Status	Requestor	Requestor ID	Building	Room	Department	Request Date	Crew	Craft	Maint. Type	Billing Type	Cost Center	Description	User	SR Verification	# of Reminders Sent	# of Total Emails Sent	Attachments
SR434892	WAIT APPR	IGLEHART, PEYTON ALEXANDRIA	8006075	0493-Cougar Softball Stadium		H0002	03/29/18	ELECTRICAL		CORRECTIVE	CHARGE		TRANSFORMER BURNT OUT BEHIND SOFTBALL FIELD	alwade	SR - Verified	2	2	
SR437794	WAIT APPR	JOURNET, PAMELA J	0838678	0483-Health 2	3041	H0190	04/24/18	GEN_MAINT	GEN-A4	CORRECTIVE	CHARGE	00730-2064-H0190-G0052-NA-100%	WASTE LABELS AND RECEPTACLES	alwade	SR - Verified	1	1	F1717609793/POME-FNL Quote 33377.pdf
SR438008	WAIT APPR	HERNANDEZ, FRANCISCO	0840908	0542-South Park Annex		H0189	04/26/18	HVAC		SERVICES	CHARGE		BUILD FILTER BRACKET FOR RUD PACKAGE UNIT	rmmathe2	SR - Verified			
SR438201	WAIT CUST	DAY, RICHARD HAROLD	1167723	0800-Campus Wide		H0190	04/27/18	FP&C NCAP		ALTERATION	CHARGE		WAYFINDING - INTERIOR	alwade	SR - Verified			
SR438386	WAIT APPR	OWENS, JACKQUELINE G	1069377	0550-Science and Research 1	531A	H0112	04/30/18	GEN_MAINT	GEN-A5	ALTERATION	CHARGE	00730-2064-H0112-D3797-NA-100%	ESTIMATE ROOM PAINTING (AUX)	alwade	SR - Verified	2	2	

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.

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.

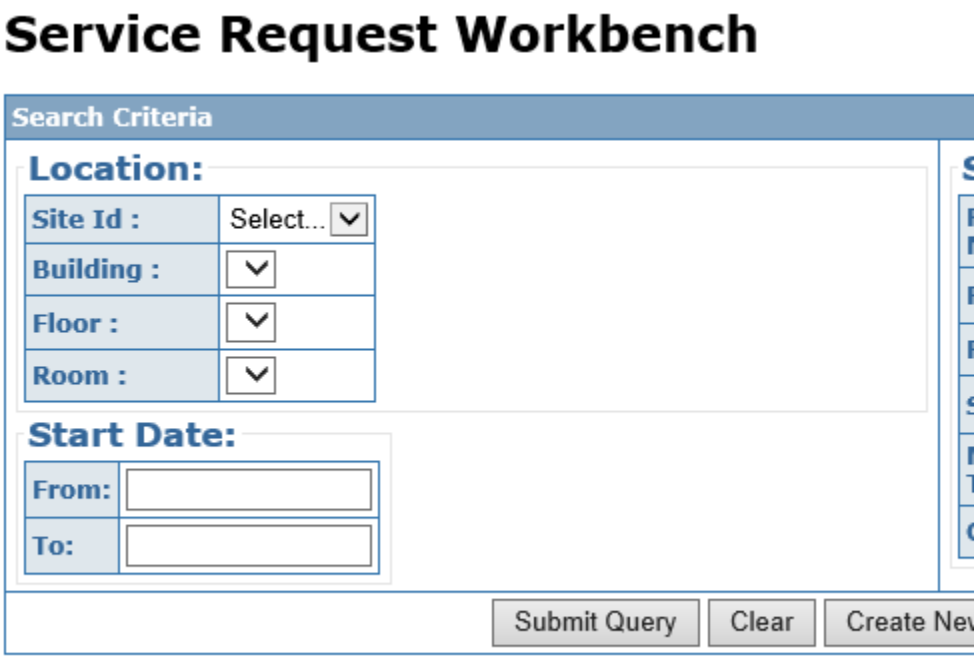
6. **Location –** location of work
   a. You may search for a particular SR or WO using the "**Location**" section by entering a Site ID, building number, floor number, and room number.

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**".



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.

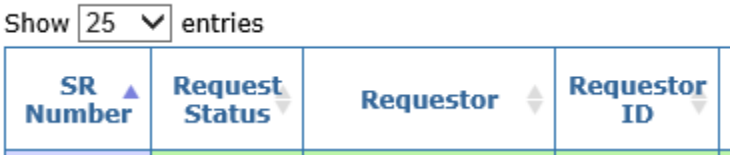
The information that **CAN** be entered in the search field includes the following:

- 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.

ELECTRICAL	CHARGE	00730-2064-H0187-G0235-NA	$0	ADD LIGHTING TO ROOM
MOVES & EV			$0	ELECTRICAL - NO POWER TO OUTLET
MOVES & EV			$0	ELECTRICAL - NO POWER TO OUTLET
FIRE ALARM	CHARGE	00730-7081-H0184-G0024-S000009	$345.6	WORK REQUEST FOR HOT WORK PERMIT FOR NEW CONSTRUCTION.
HVAC	NO CHARGE	00730-2064-H0189-G0247-NA	$0	ROOM IS TOO HOT

Previous Next

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.**

Export to Excel

Search: alarm issue

equest/Work rder Status	Crew	Billing Type	Cost Center	Cost Summary	Description
QUESTED	FIRE ALARM			$0	ALARM ISSUE
QUESTED	FIRE ALARM	NO CHARGE	00730-2064-H0613-G0610-NA	$0	ALARM ISSUE
QUESTED	FIRE ALARM	NO CHARGE	00730-2064-H0613-G0610-NA	$0	ALARM ISSUE
QUESTED	FIRE ALARM	NO CHARGE	00730-2064-H0613-G0610-NA	$0	ALARM ISSUE
QUESTED				$0	ALARM ISSUE

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**.

Show 25 entries

SR Number	Request Status
SR434892	WAIT APPR
SR437794	WAIT APPR
SR438008	WAIT APPR
SR438201	WAIT CUST
SR438386	WAIT APPR
SR438420	WAIT APPR
SR438532	WAIT APPR

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.

Location Information	
Site:	00730
Building Number:	0493-Cougar Softball Stadium
Floor:	Select an...
Room:	Select an...
Department:	H0002
Zone:	AUX

Update Other SR Information

1. Find appropriate field to change.
2. Use fields or dropdowns to change.

General Information	
Service Request Number:	SR434892
Description:	TRANSFORMER BURNT OUT BEHIND SOFTBALL FIELD
Maintenance Type:	CORRECTIVE
Method:	
Priority:	3
Crew:	ELECTRICAL
Craft:	
Assigned To:	
Service Request Status:	WAIT APPR
Submittal Method:	Phone
Start Date:	29-MAR-18
Due Date:	22-MAY-18

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

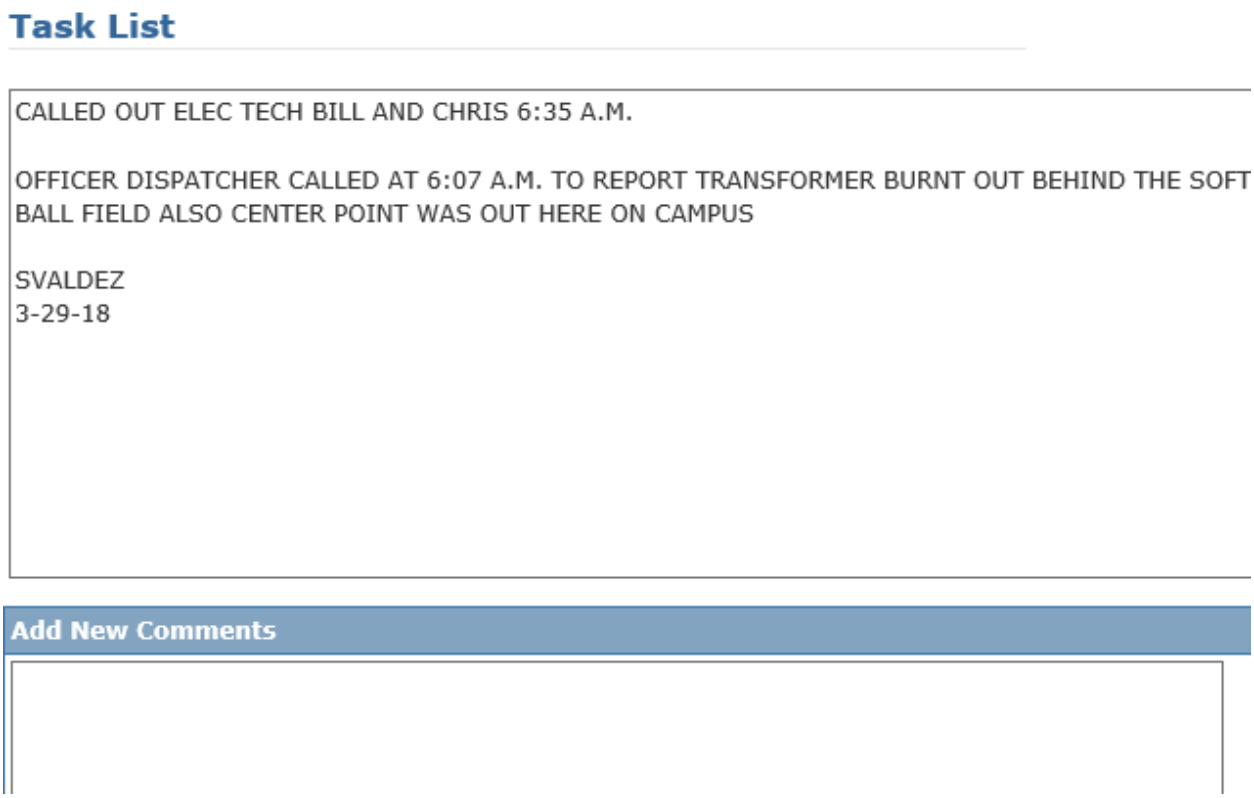
1. Go to Billing Type and Cost Center(s) section.
2. Verify the Billing Type:
3. Verify the account information:
4. Verify the total percent of account segment **equals to 100%**

Billing Type	
Billing Type:	CHARGE

Cost Center(s)							
Speed Type:	Business Unit:	Fund Code:	Department ID:	Program:	Project ID:	Percentage (%):	
	00730					100	Clear
	00730					100	Clear
	00730					100	Clear

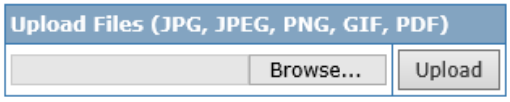
Update Task List

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**



Add Attachments and Notes

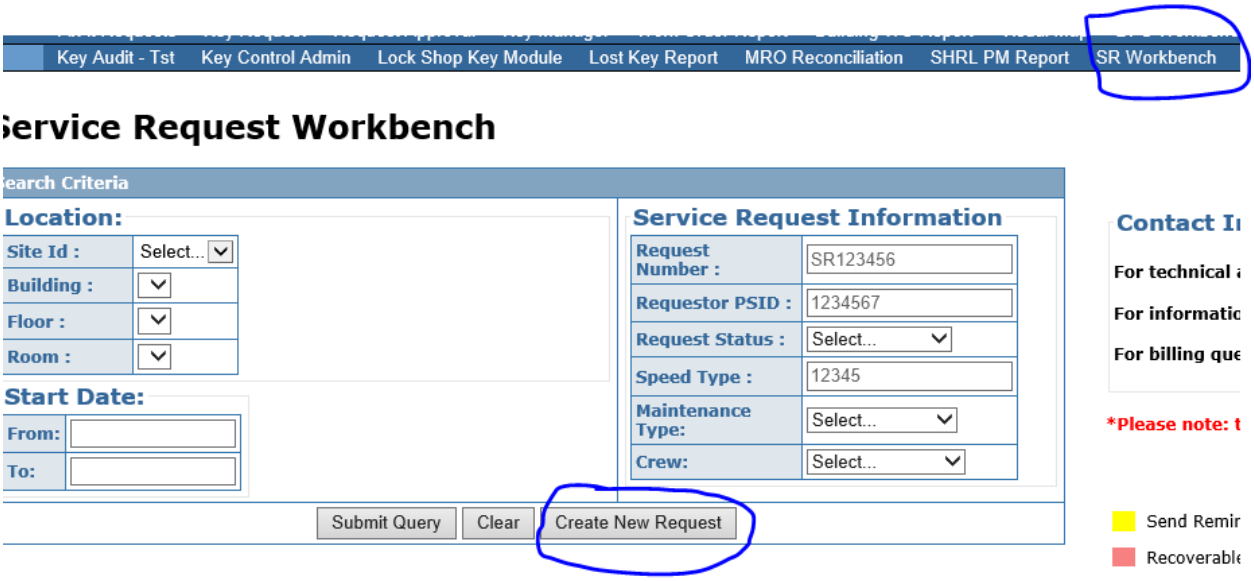
1. Go to Upload Files section.
2. Click browse to find file on computer
3. Click Upload to upload file.
4. Repeat as necessary.



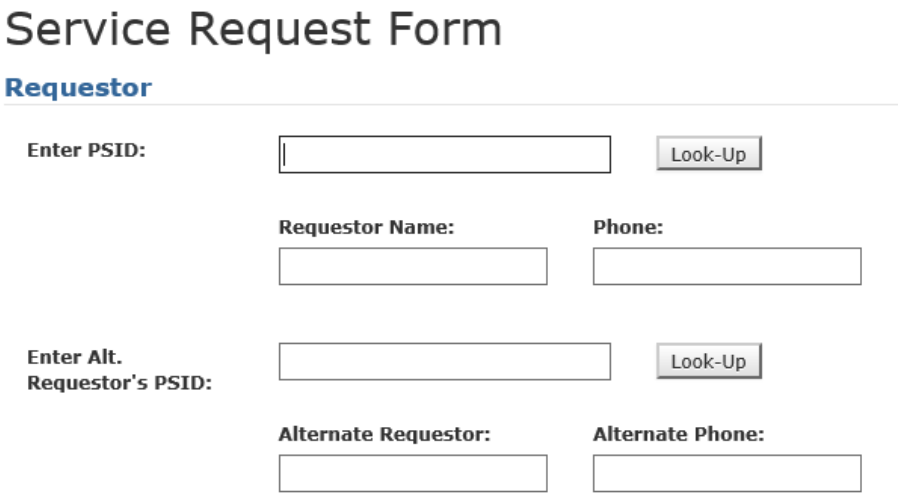
Create a Service Request

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...

Floor:
Select an...

Dept:
Select an Op...

Method:

Bldg:*Required
Select an Option

Room:
Select an...

Zone:
Select an Op...

Work Description

Work Title:*Required

Description of Work:

Maintenance Type:
Select... *Required

Priority:
Select... *Required

Status:
Select... *Required

Crew:
Select... *Required

Craft:
Select...

Submittal Method:
Select... *Required

Earliest Start Date:
12-May-2018

Latest Completion Date:
12-Jun-2018

Dates/Times Work Cannot be Done in Location:

Billing

5. Enter Billing information.

Billing

Billing Type:*Required
CHARGE

Enter Speed Type:

Percentage (%):

Business Unit:	Fund Code:	Department ID:	Program:	Project ID:	Percentage (%):
00730	####	H####	G####		

Enter Speed Type 2:

Percentage (%):

Business Unit:	Fund Code:	Department ID:	Program:	Project ID:	Percentage (%):
00730	####	H####	G####		

Enter Speed Type 3:

Percentage (%):

Business Unit:	Fund Code:	Department ID:	Program:	Project ID:	Percentage (%):
00730	####	H####	G####		

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.

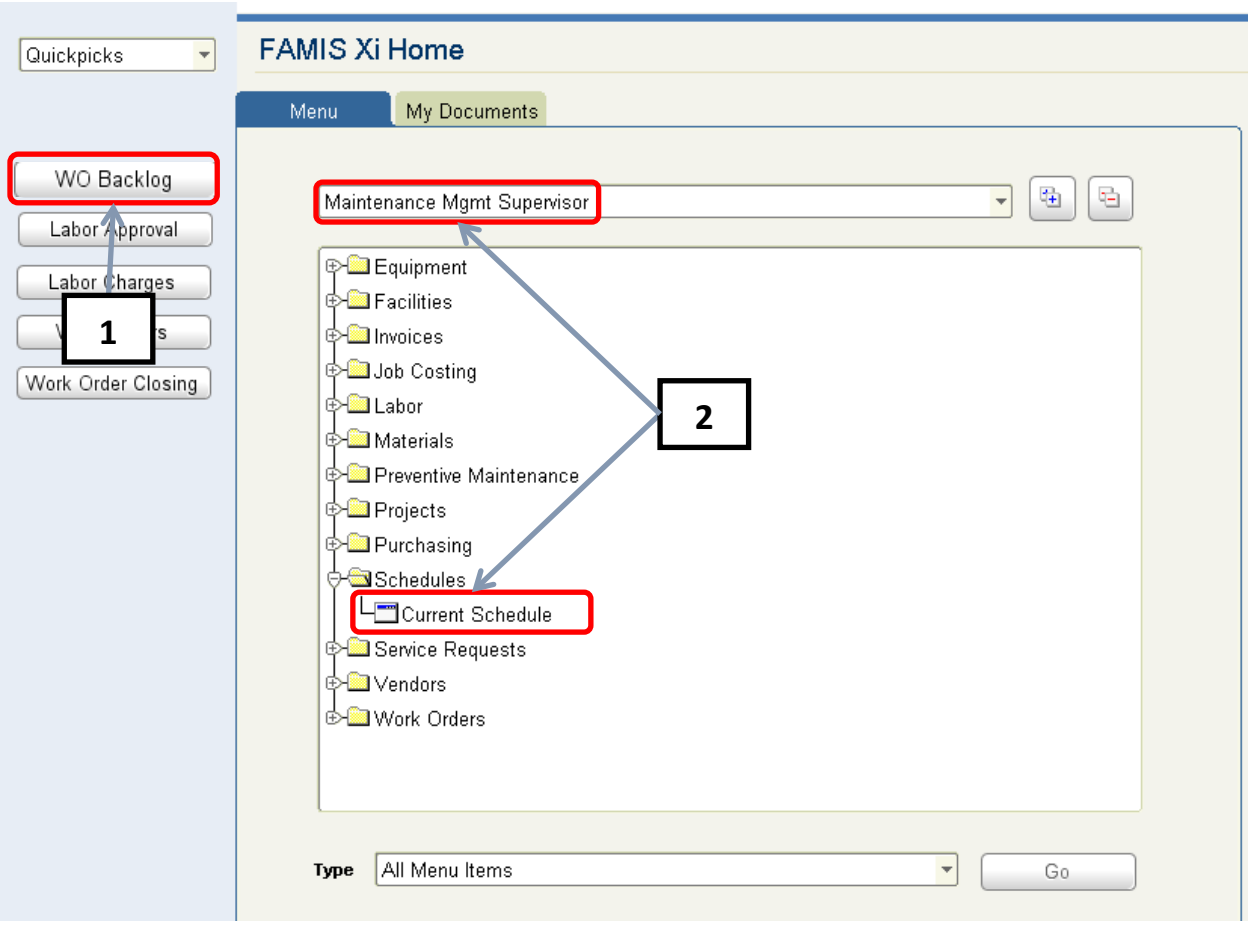
Finding Work Orders

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

Current Schedule Workbench / WO Backlog

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

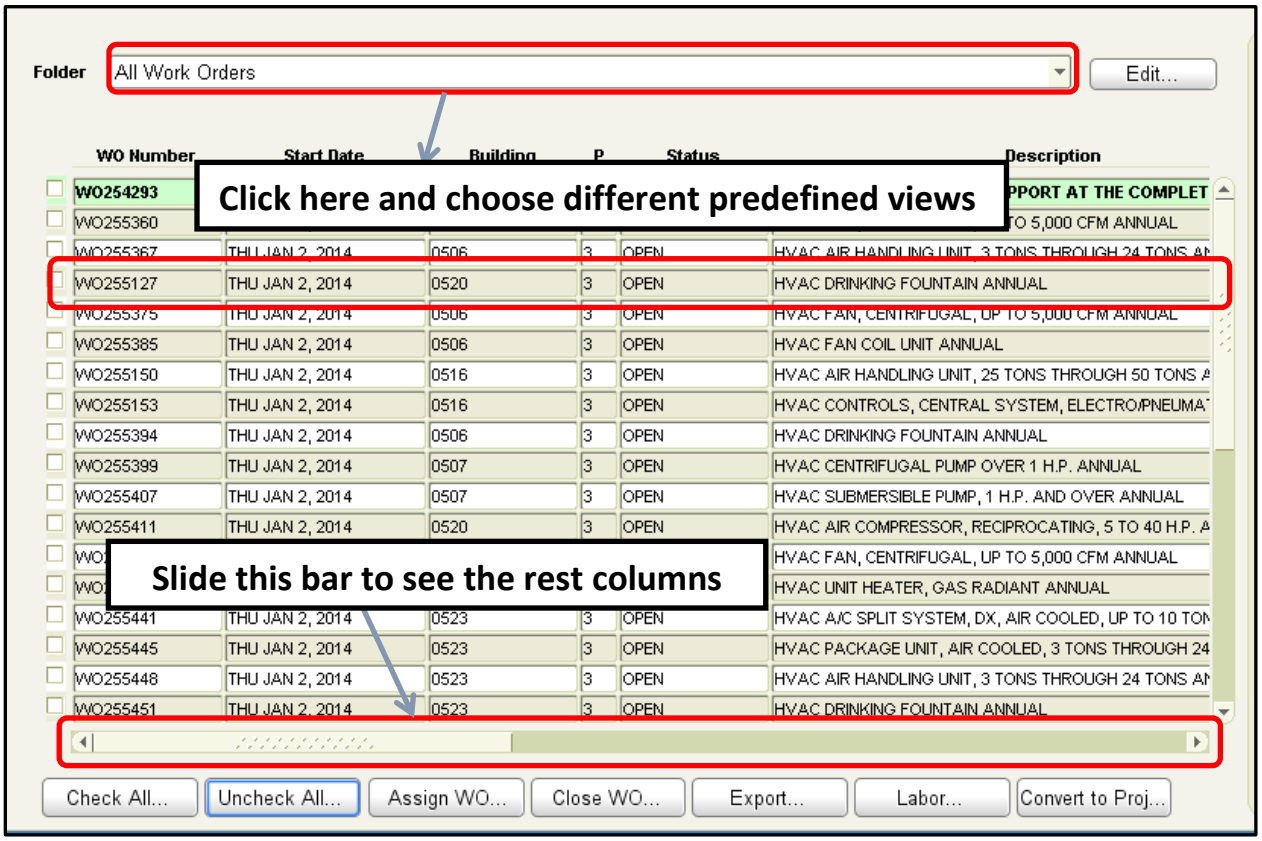
1. Click on **WO Backlog shortcut button** on the left
2. Select **Maintenance Mgmt Supervisor** or **Crew Technician** in the role selection, then Double click **Current Schedule** form under **Schedules** folder



Current Schedule Workbench / WO Backlog Overview

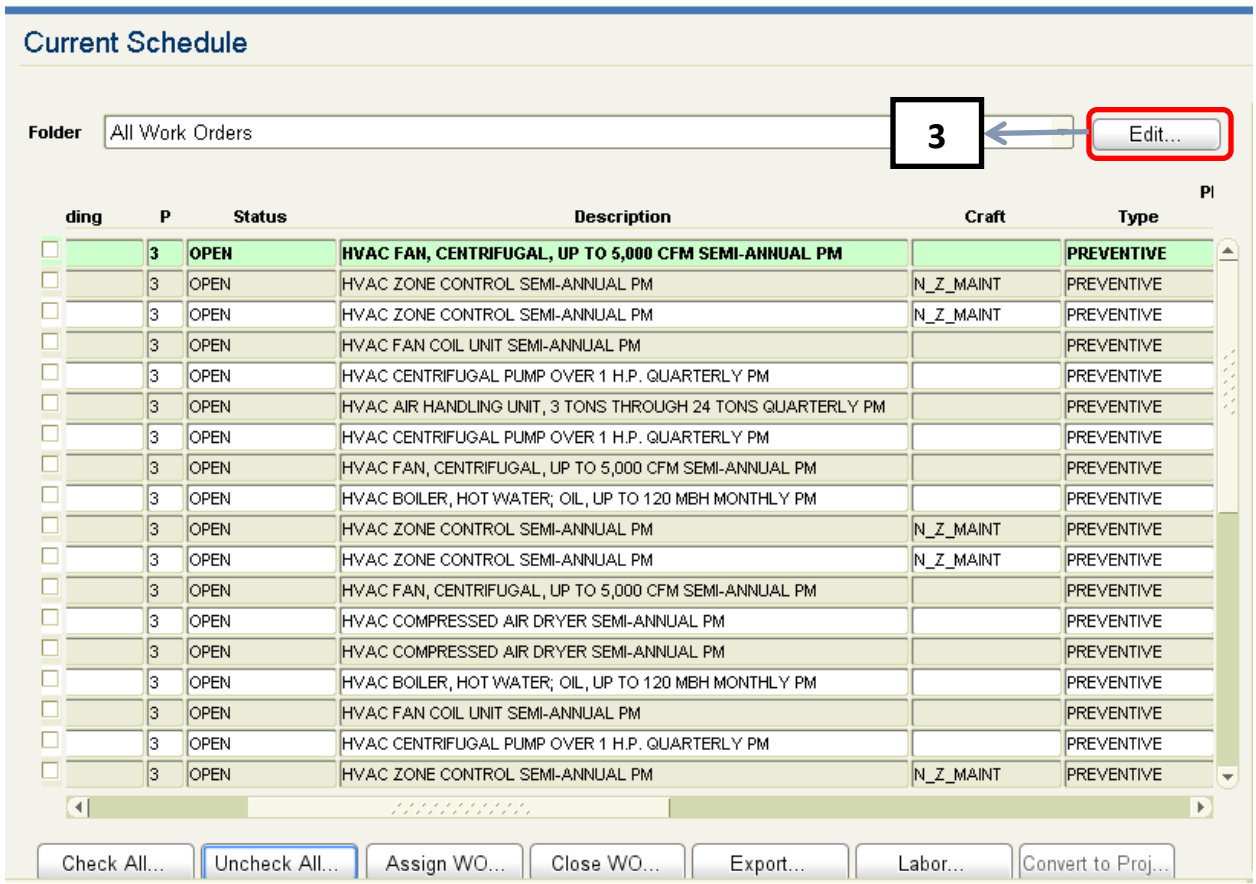
The Schedule Workbench lists all work orders that meet predefined criteria. The lists may be different depend on the filters that we set up. It can be the list of all open work orders for your crew, the list of all work orders that are assigned to yourself, etc.

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.

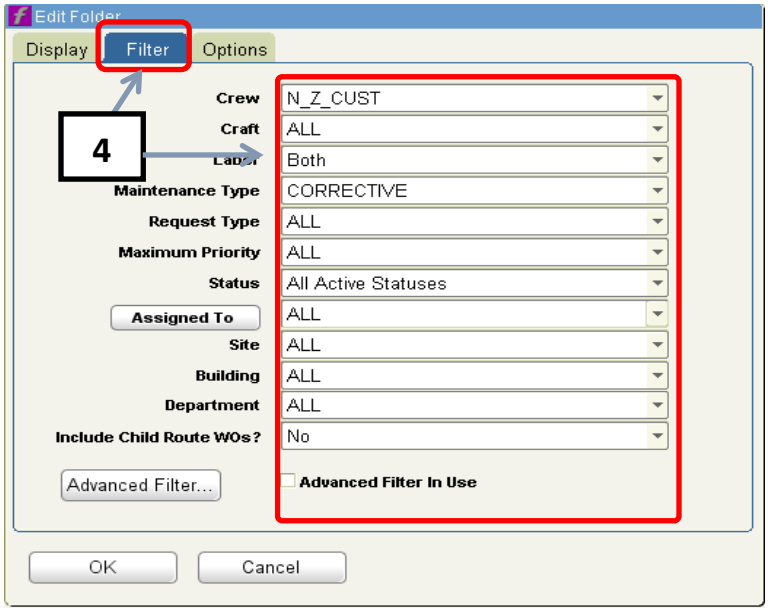


Create custom view

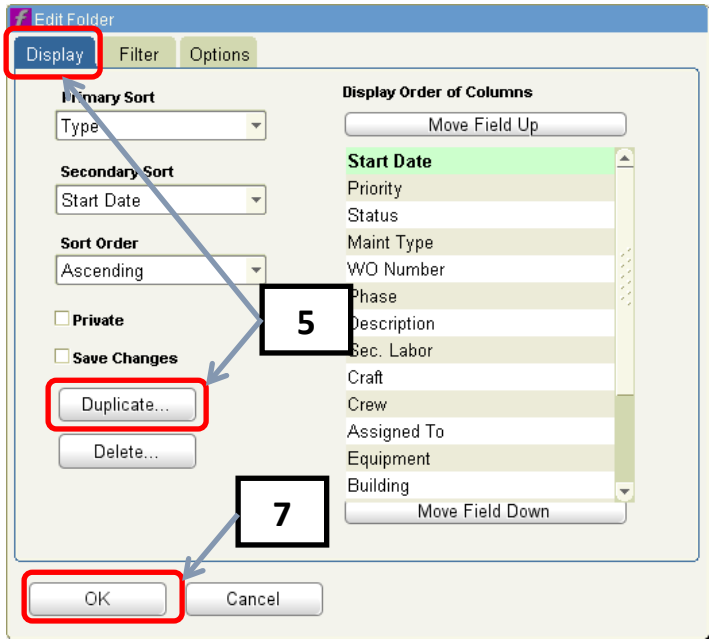
To view work orders that meet specific criteria, click **Edit**

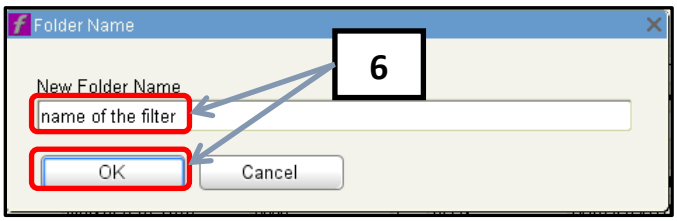


1. Click **Filter**, select desired criteria; you may choose to view work orders that belong to a certain crew, craft, labor type, building, department etc. You may select more than one criteria



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

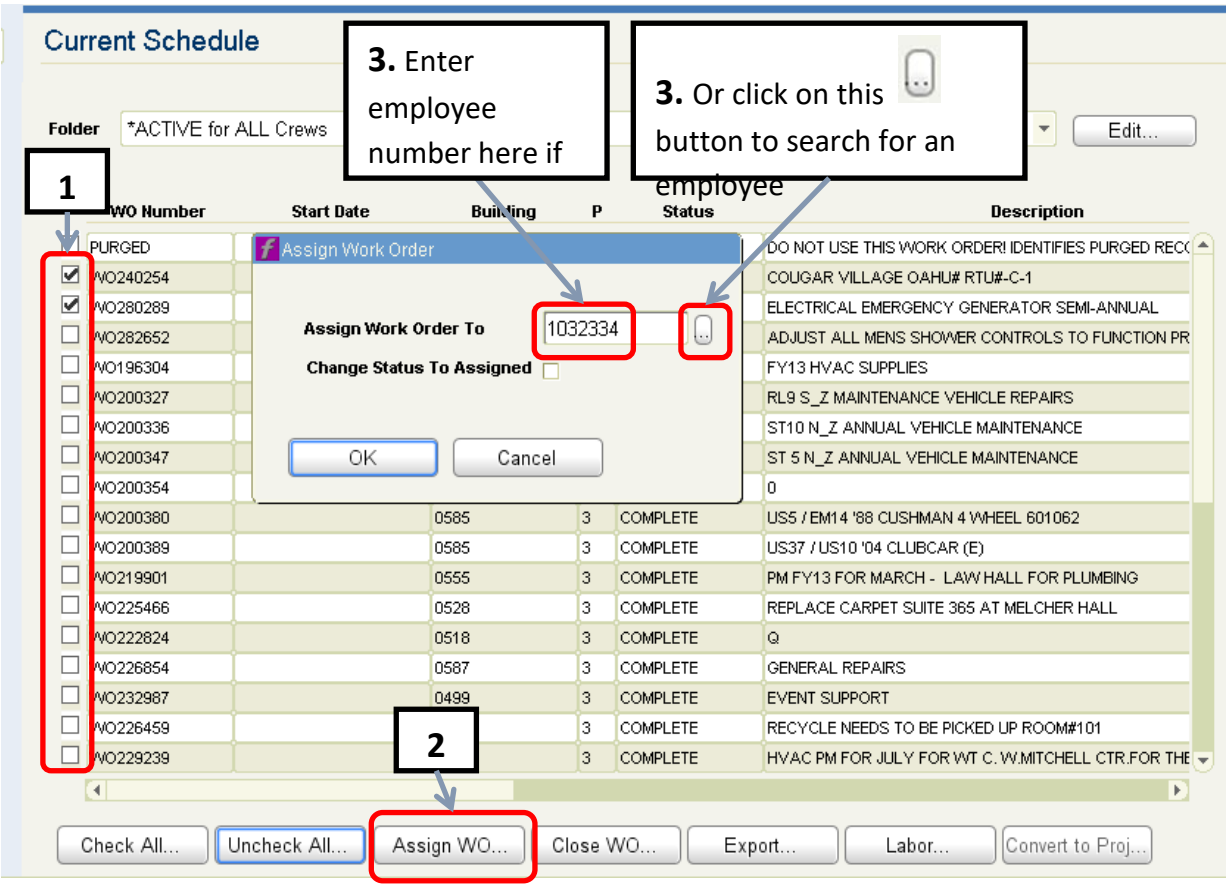


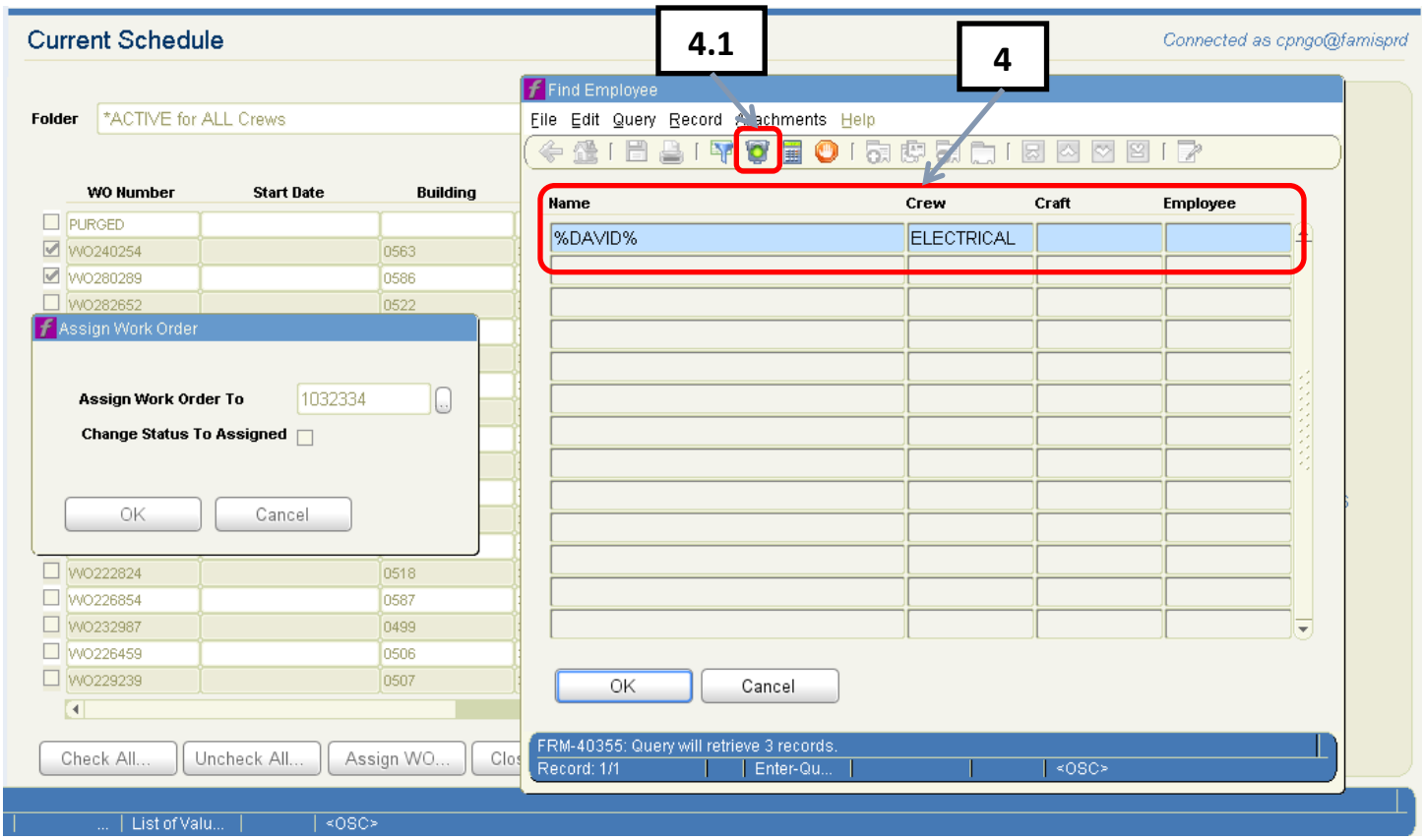


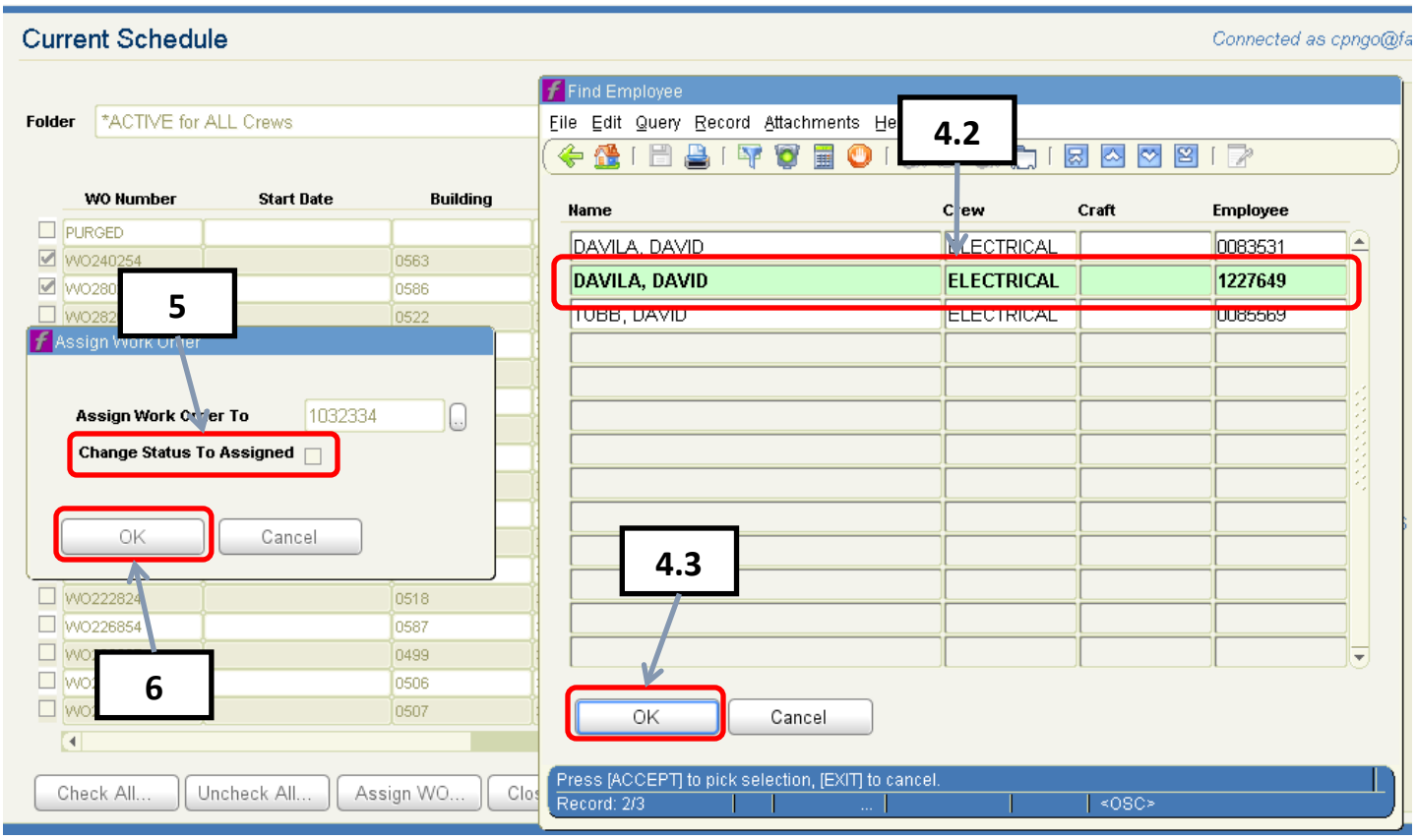
Current Schedule Functionalities

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




Current Schedule
Connected as cpngo@famisprd
4.1
4
Find Employee
File Edit Query Record Attachments Help
Name
Crew
Craft
Employee
%DAVID%
ELECTRICAL
OK
Cancel
FRM-40355: Query will retrieve 3 records.
Record: 1/1
Enter-Qu...
<OSC>
Folder
*ACTIVE for ALL Crews
WO Number
Start Date
Building
PURGED
WO240254
WO280289
WO282652
WO222824
WO226854
WO232987
WO226459
WO229239
Assign Work Order
Assign Work Order To
1032334
Change Status To Assigned
OK
Cancel
Check All...
Uncheck All...
Assign WO...
List of Valu...
<OSC>


Current Schedule
Connected as cpngo@fa
Find Employee
File Edit Query Record Attachments He
4.2
Name
Crew
Craft
Employee
DAVILA, DAVID
ELECTRICAL
0083531
DAVILA, DAVID
ELECTRICAL
1227649
TOBB, DAVID
ELECTRICAL
0085569
4.3
OK
Cancel
Press [ACCEPT] to pick selection, [EXIT] to cancel.
Record: 2/3
<OSC>
Folder
*ACTIVE for ALL Crews
WO Number
Start Date
Building
PURGED
WO240254
5
Assign Work Order
Assign Work Order To
1032334
Change Status To Assigned
OK
Cancel
6
Check All...
Uncheck All...
Assign WO...

Mass Closing Work Orders

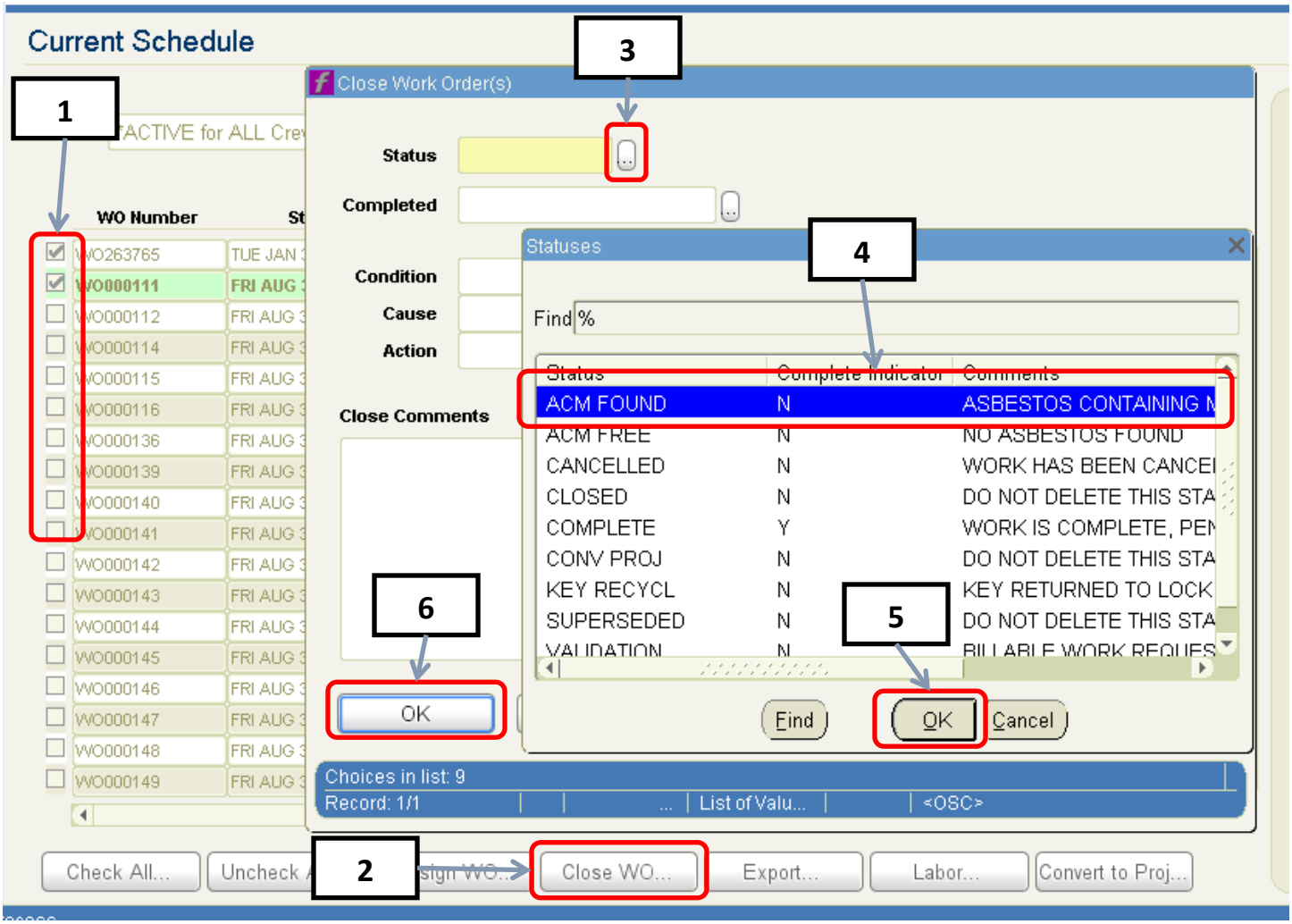
This functionality is used to change the status of one or more Work Orders.

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.

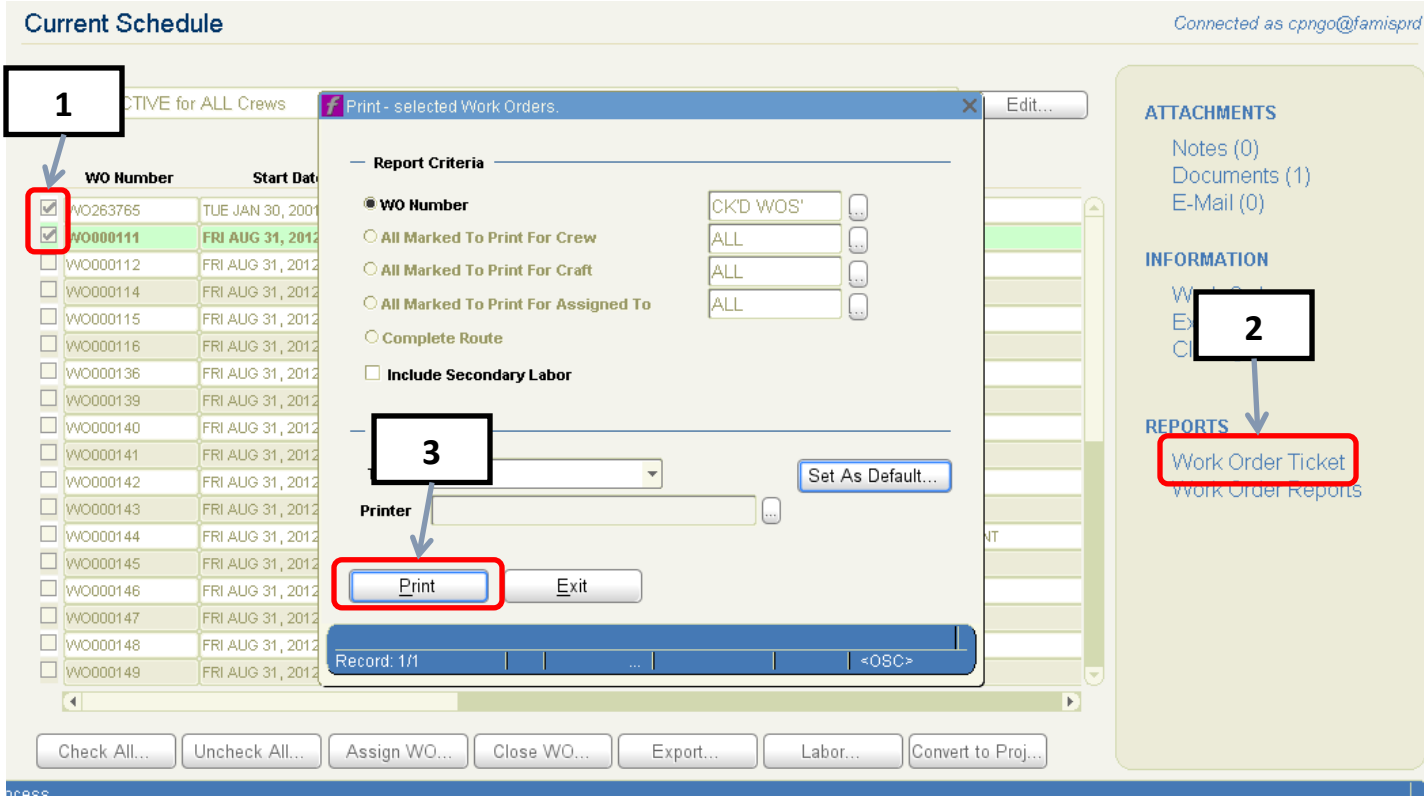
WO Status	**Active**	**Email Notification**	**Definition**
ASSIGNED	Y	Y	Work order has been assigned to a specific employee
COMPLETE	Y	Y	Employee has reported to his/her supervisor that the work has been completed
OPEN	Y	Y	Work order is active and pending assignment after review by crew supervisor
REVIEW	Y	N	Work order requires further review to address some type of issue
EST SENT	Y	N	Quotes for work has been sent to customer
EST APPRVD	Y	N	Quote has been approved by the customer
EST RECVD	Y	N	Quote has been returned back to crew supervisor
HOLD	Y	N	Work Order has been delayed for a reason
MAT RECVD	Y	N	Material for a work order has been received into the work order. Materials are awaiting pick up from FASTENAL
WAIT MATRL	Y	N	Used to denote a work order cannot move forward until materials are ordered and received into the work order.
PARENT ONL	Y	N	Used to denote a work order that is used as a parent for holding information on long term work orders
RET-SERV	Y	N	Used by AUTO SHOP to denote a vehicle has been returned to service.

CANCELLED	N	N	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.
CLOSED	N	Y	Supervisor has reviewed the work order for completeness and no further action is required. All billable charges may be released.


Current Schedule
1
2
3
4
5
6
Close Work Order(s)
Status
Completed
Condition
Cause
Action
Close Comments
OK
Statuses
Find %
Status
Complete Indicator
Comments
ACM FOUND N ASBESTOS CONTAINING M
ACM FREE N NO ASBESTOS FOUND
CANCELLED N WORK HAS BEEN CANCEL
CLOSED N DO NOT DELETE THIS STA
COMPLETE Y WORK IS COMPLETE, PEN
CONV PROJ N DO NOT DELETE THIS STA
KEY RECYCL N KEY RETURNED TO LOCK
SUPERSEDED N DO NOT DELETE THIS STA
Find
OK
Cancel
Choices in list: 9
Record: 1/1
List of Valu...
<OSC>
WO Number
Check All...
Uncheck
Close WO...
Export...
Labor...
Convert to Proj...

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

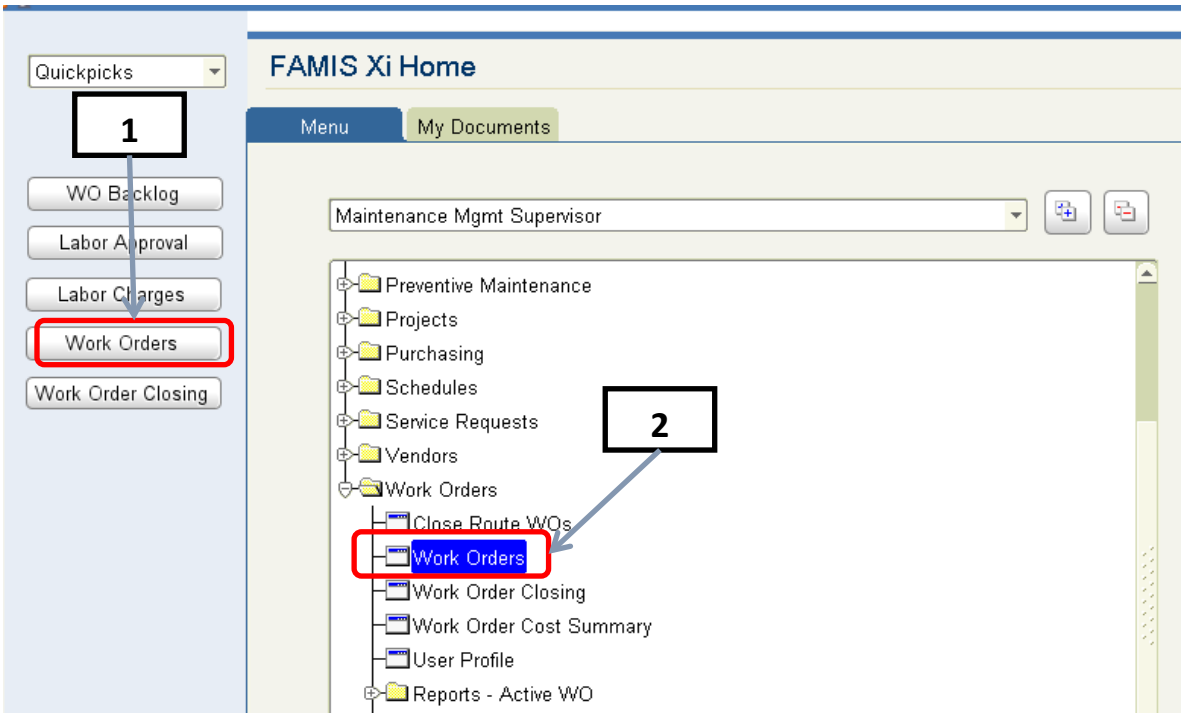


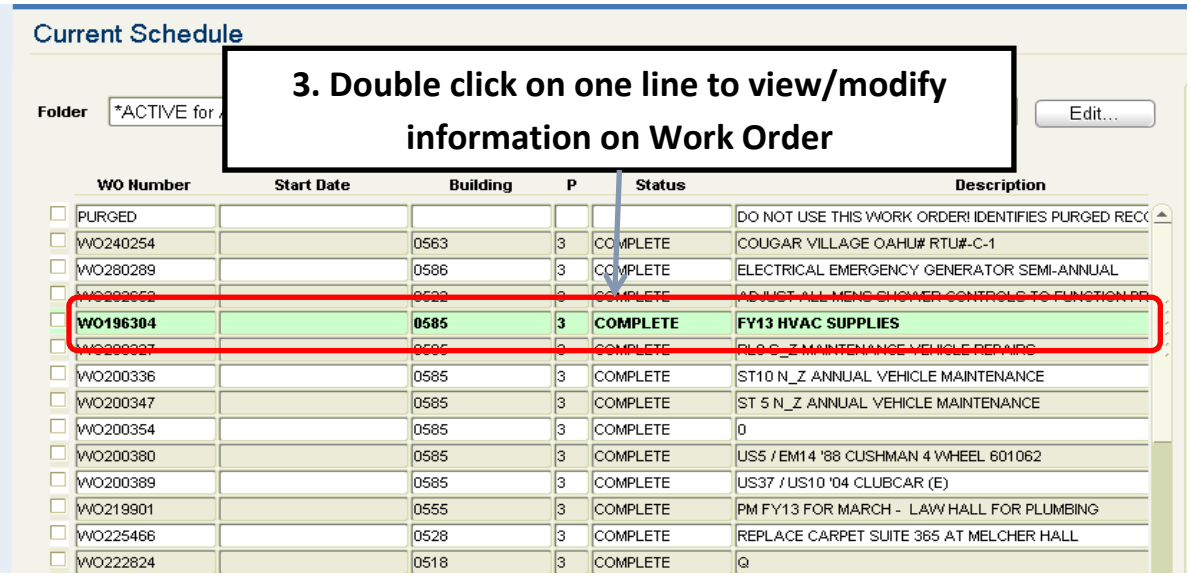
Work Order Form

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.



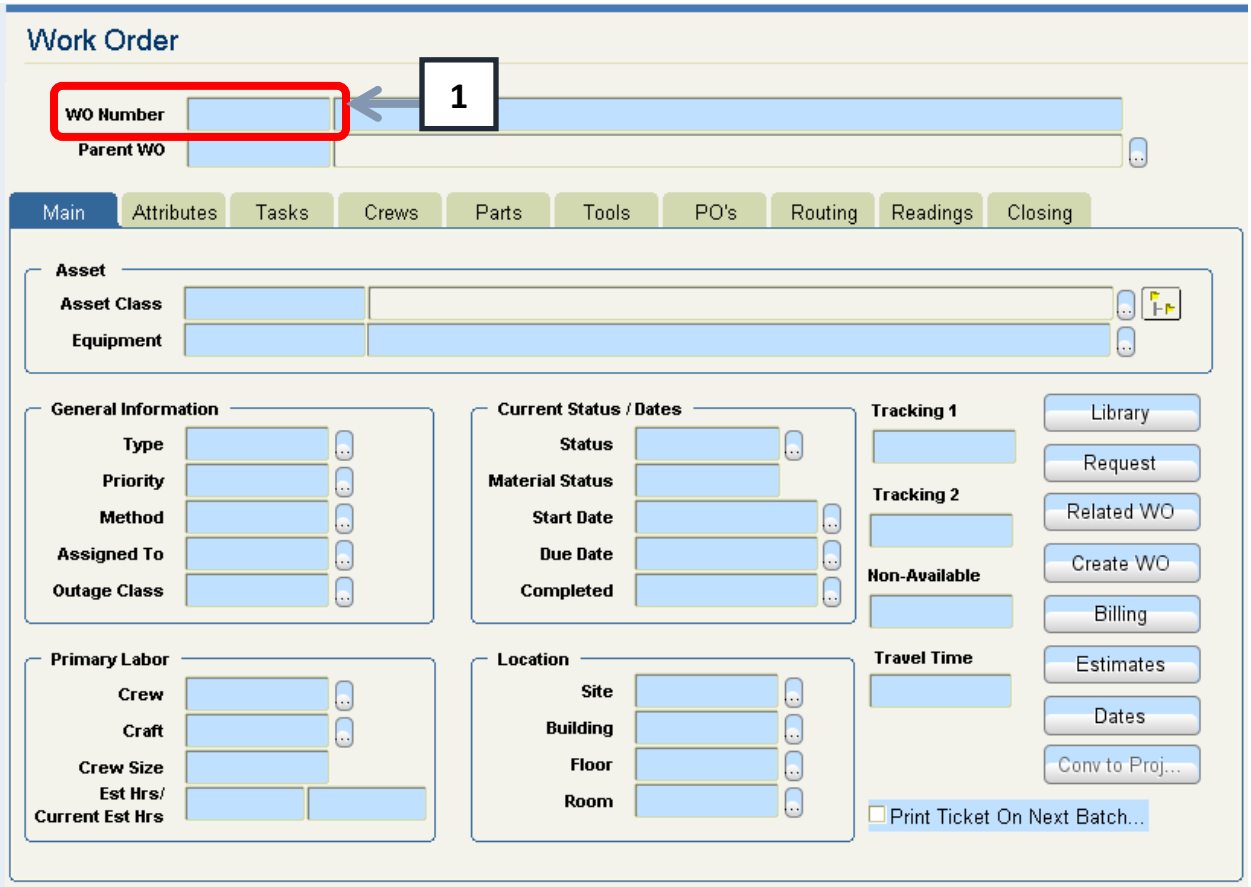


Searching for Work Orders

Four ways you can search for a specific Work Order:

Searching by entering a Work Order number

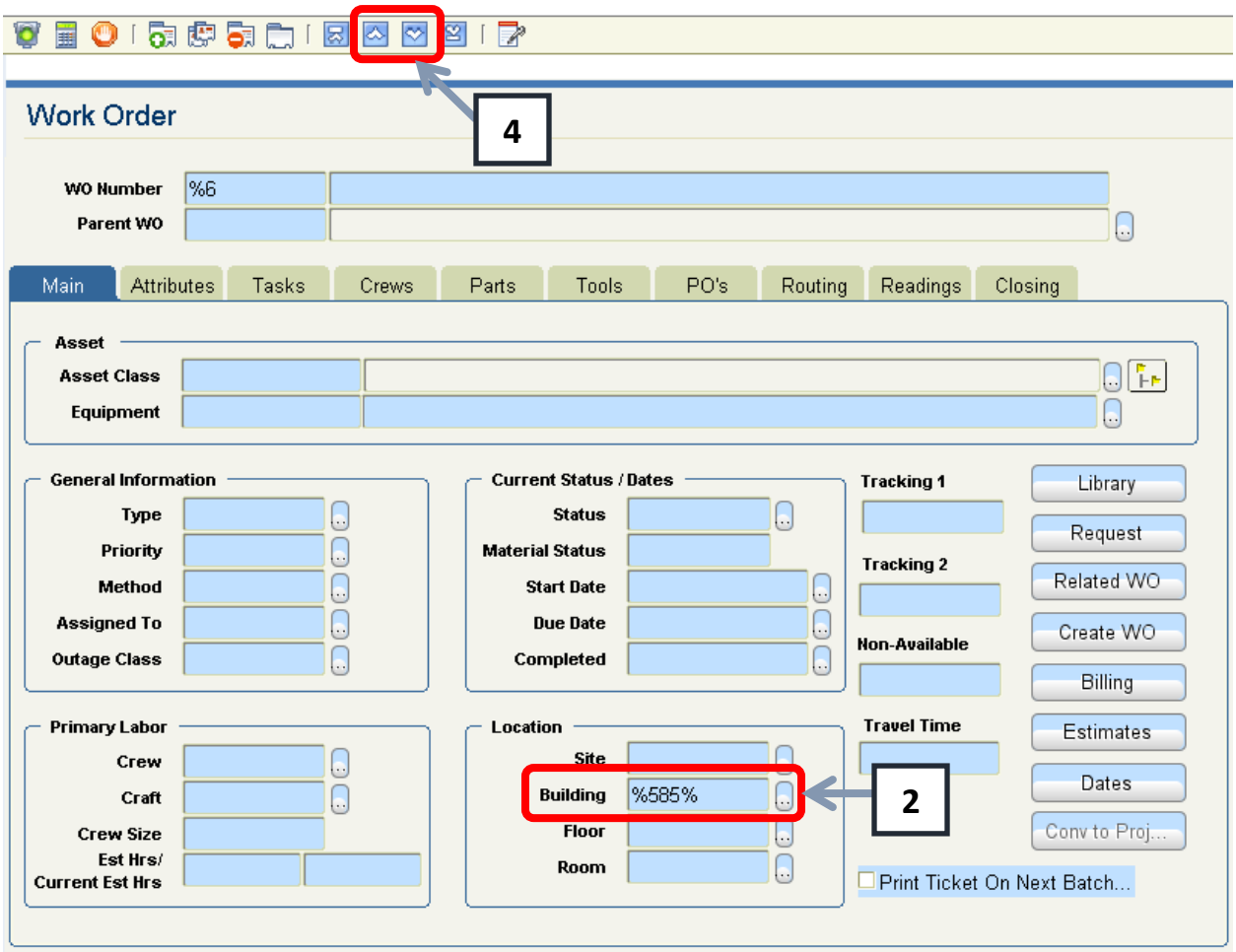
1. Press F7 to enter query in the Work Order form; all fields will turn blue
2. Enter the specific WO Number in the blue field
3. Press F8 to run query; F8 will open the specific Work Order



"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

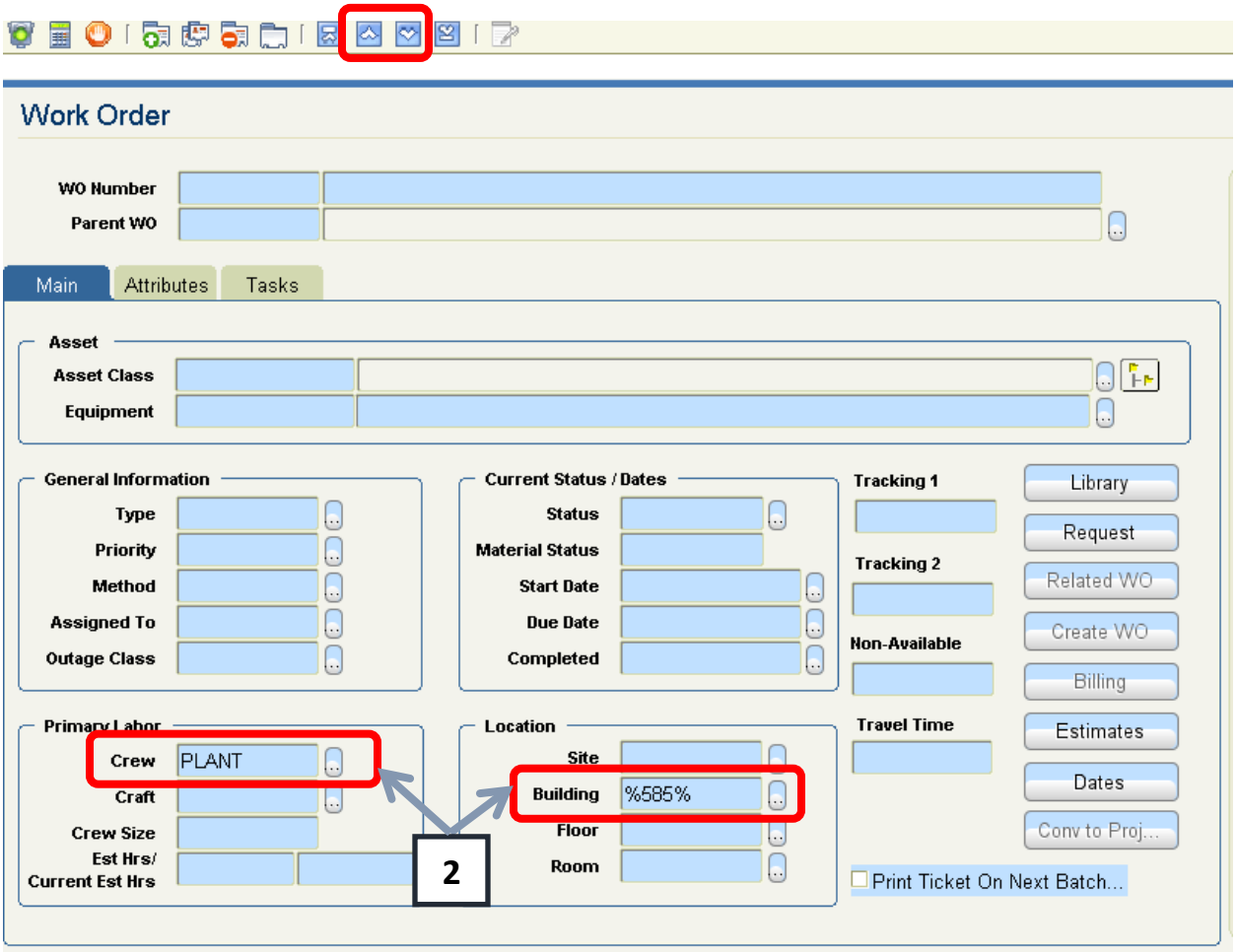
1. In the Work Order form, press F7 to enter query
2. Once all fields turn blue, enter the specific criteria between 2 percent signs; in this case we will enter %585% to view all work orders in building 585
3. Press F8 to run query; F8 will open the first Work Order
4. Use the arrow keys to navigate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



Multiple Field Search

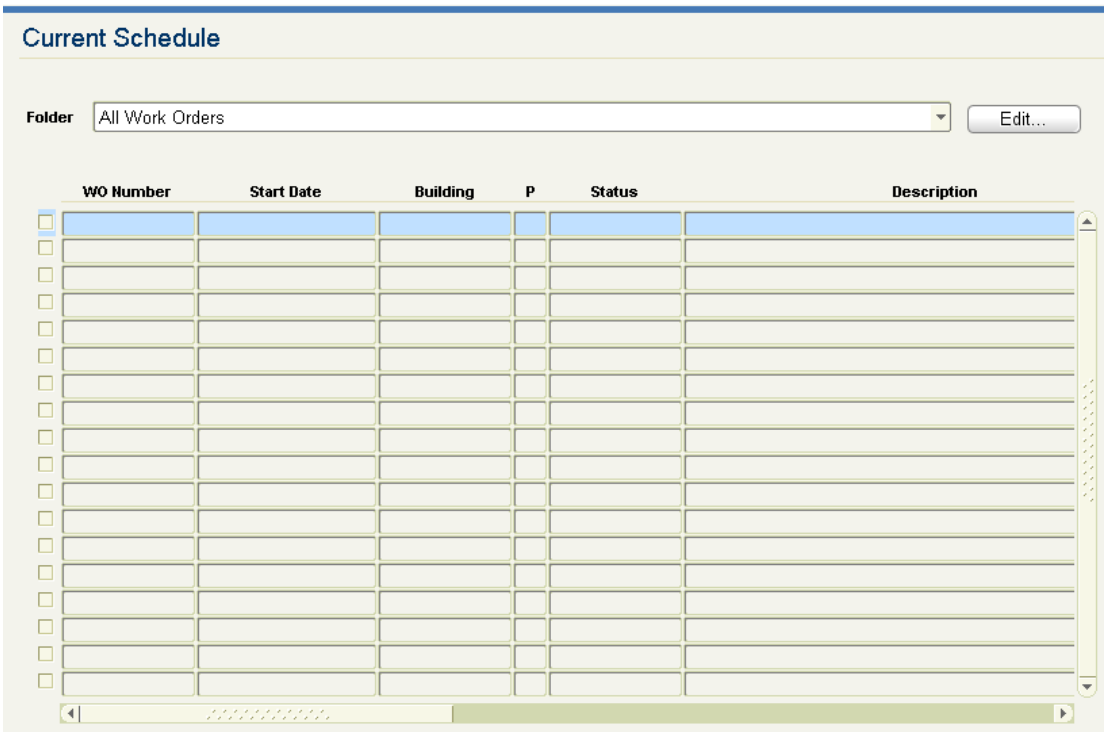
This feature allows you to view **all** Work Orders that meet more than one specific criterion. For example, let's view all Work Orders in Building 585 and assigned to the PLANT crew

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

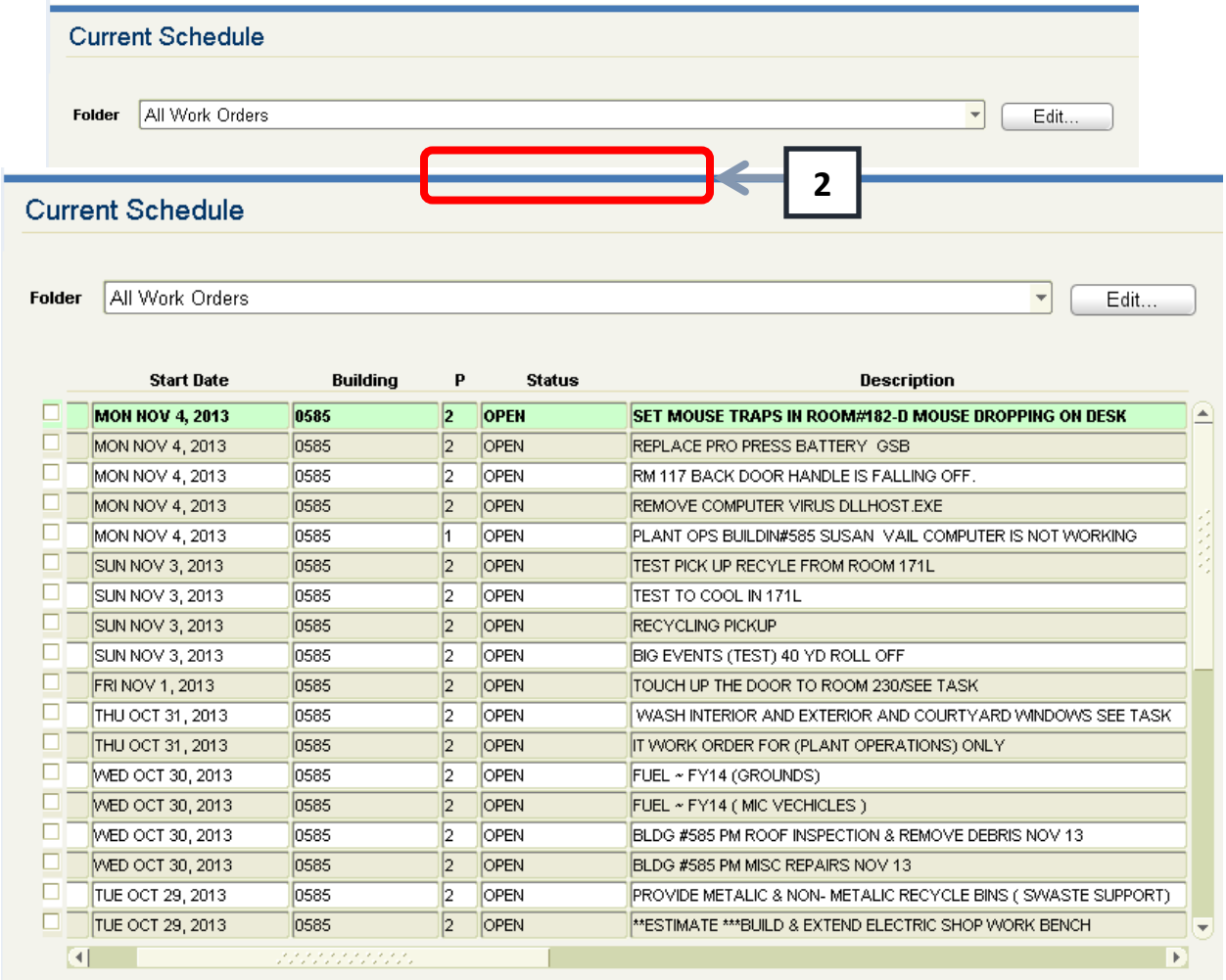


Workbench Search

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

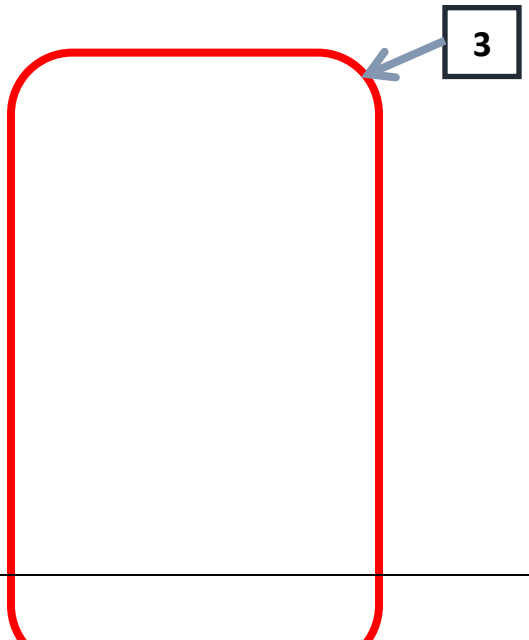


2. Enter criteria via the Wild Card Search method in any of the blue fields; for example, lets view all OPEN work orders in building 585



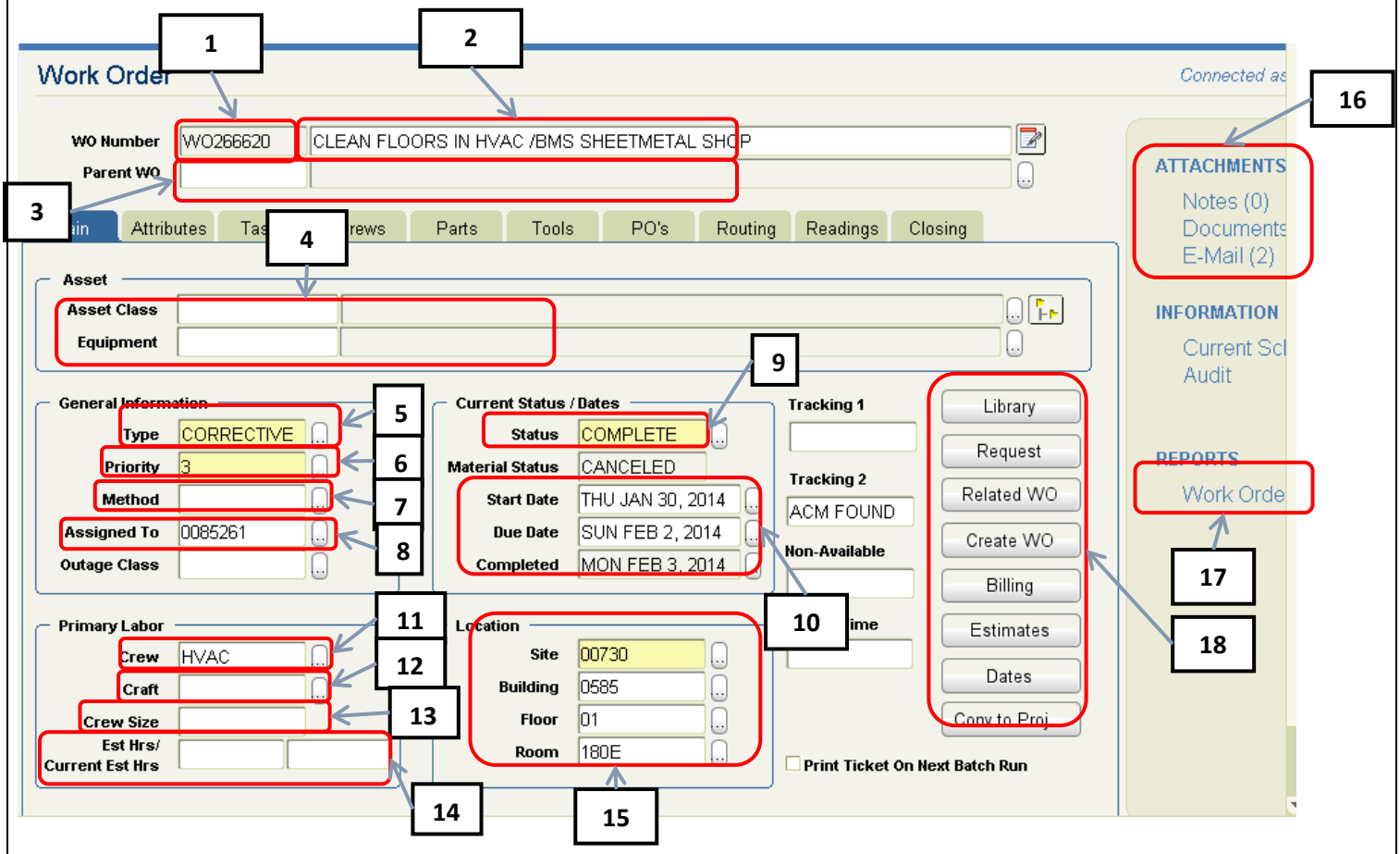
Start Date	Building	P	Status	Description
MON NOV 4, 2013	**0585**	**2**	**OPEN**	**SET MOUSE TRAPS IN ROOM#182-D MOUSE DROPPING ON DESK**
MON NOV 4, 2013	0585	2	OPEN	REPLACE PRO PRESS BATTERY GSB
MON NOV 4, 2013	0585	2	OPEN	RM 117 BACK DOOR HANDLE IS FALLING OFF.
MON NOV 4, 2013	0585	2	OPEN	REMOVE COMPUTER VIRUS DLLHOST.EXE
MON NOV 4, 2013	0585	1	OPEN	PLANT OPS BUILDIN#585 SUSAN VAIL COMPUTER IS NOT WORKING
SUN NOV 3, 2013	0585	2	OPEN	TEST PICK UP RECYLE FROM ROOM 171L
SUN NOV 3, 2013	0585	2	OPEN	TEST TO COOL IN 171L
SUN NOV 3, 2013	0585	2	OPEN	RECYCLING PICKUP
SUN NOV 3, 2013	0585	2	OPEN	BIG EVENTS (TEST) 40 YD ROLL OFF
FRI NOV 1, 2013	0585	2	OPEN	TOUCH UP THE DOOR TO ROOM 230/SEE TASK
THU OCT 31, 2013	0585	2	OPEN	WASH INTERIOR AND EXTERIOR AND COURTYARD WINDOWS SEE TASK
THU OCT 31, 2013	0585	2	OPEN	IT WORK ORDER FOR (PLANT OPERATIONS) ONLY
WED OCT 30, 2013	0585	2	OPEN	FUEL ~ FY14 (GROUNDS)
WED OCT 30, 2013	0585	2	OPEN	FUEL ~ FY14 (MIC VECHICLES)
WED OCT 30, 2013	0585	2	OPEN	BLDG #585 PM ROOF INSPECTION & REMOVE DEBRIS NOV 13
WED OCT 30, 2013	0585	2	OPEN	BLDG #585 PM MISC REPAIRS NOV 13
TUE OCT 29, 2013	0585	2	OPEN	PROVIDE METALIC & NON- METALIC RECYCLE BINS (SWASTE SUPPORT)
TUE OCT 29, 2013	0585	2	OPEN	**ESTIMATE ***BUILD & EXTEND ELECTRIC SHOP WORK BENCH

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:

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

7. *Method*

Method field allows specifying if the work order is performed:

i. **In-house** – indicates work performed by FM Crew
ii. **Contract** – indicates work performed by contractor/vendor
iii. **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:

WO Status	Active	Email Notification	Definition
ASSIGNED	Y	Y	Work order has been assigned to a specific employee
COMPLETE	Y	Y	Employee has reported to his/her supervisor that the work has been completed
OPEN	Y	Y	Work order is active and pending assignment after review by crew supervisor
REVIEW	Y	N	Work order requires further review to address some type of issue
EST SENT	Y	N	Quotes for work has been sent to customer
EST APPRVD	Y	N	Quote has been approved by the customer
EST RECVD	Y	N	Quote has been returned back to crew supervisor
HOLD	Y	N	Work Order has been delayed for a reason
MAT RECVD	Y	N	Material for a work order has been received into the work order. Materials are awaiting pick up from FASTENAL
WAIT MATRL	Y	N	Used to denote a work order cannot move forward until materials are ordered and received into the work order.
PARENT ONL	Y	N	Used to denote a work order that is used as a parent for holding information on long term work orders
RET-SERV	Y	N	Used by AUTO SHOP to denote a vehicle has been returned to service.
CANCELLED	N	N	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.

CLOSED	N	Y	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:

Field Name	Description
Start Date	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.
Due Date	Calculated based off the Priority Code. Date the work is due to be finished. Can be changed by user.
Completed Date	Date the actual work was completed. This date will be filled in automatically when Status is set to COMPLETED.

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

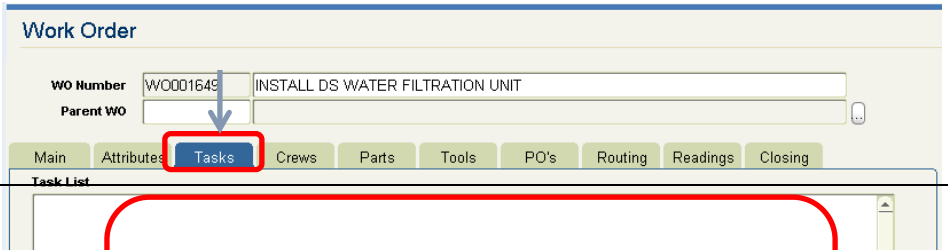
Estimates – allows you to view/enter and calculate work order estimates

Dates – date work order was scheduled

Conv. To Project – allows you to convert work order to project

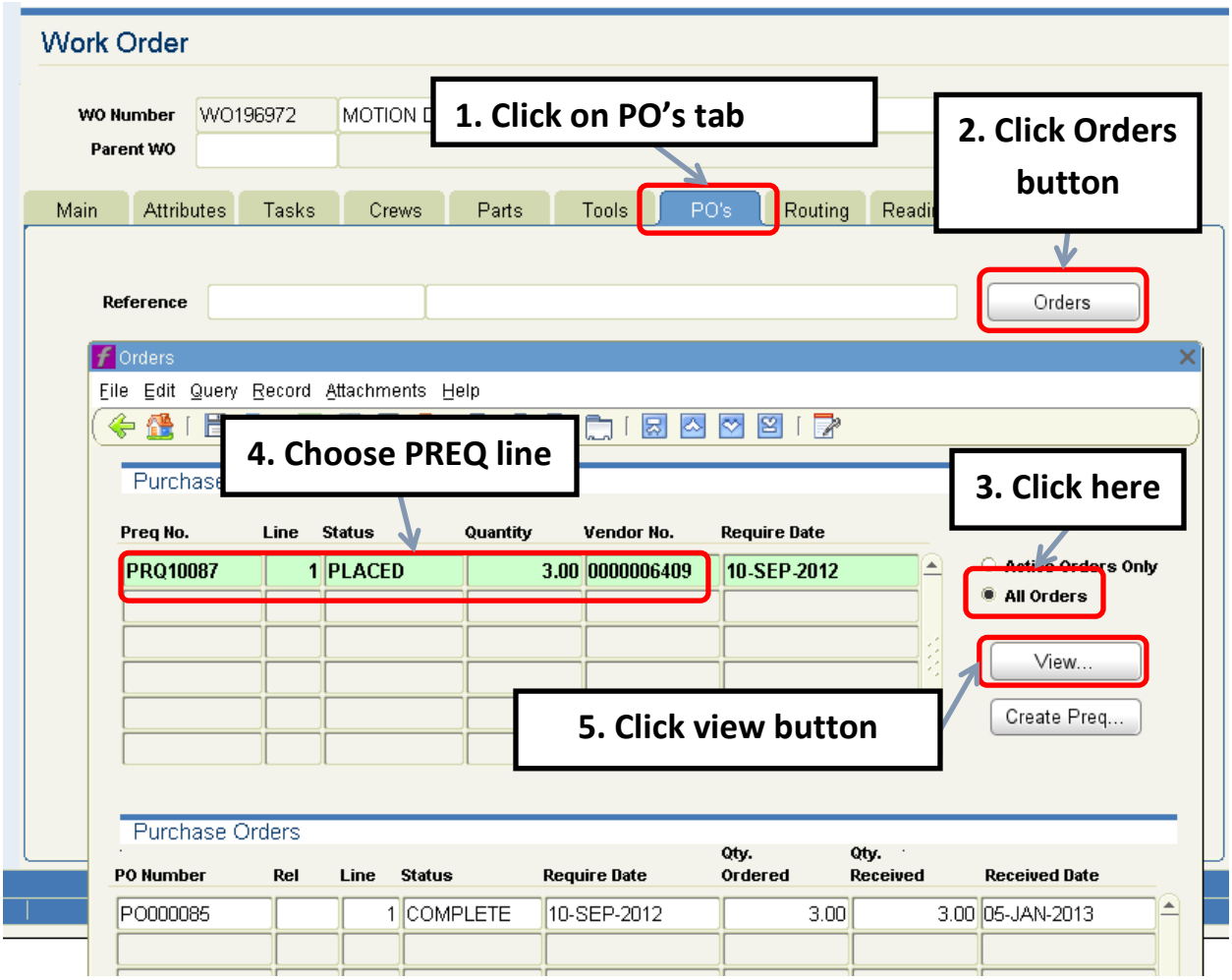
19. Task List of a Work Order

Tasks Tab allows you to enter list of Work Order tasks and procedures under Tasks List. These details will print with Work Order Report

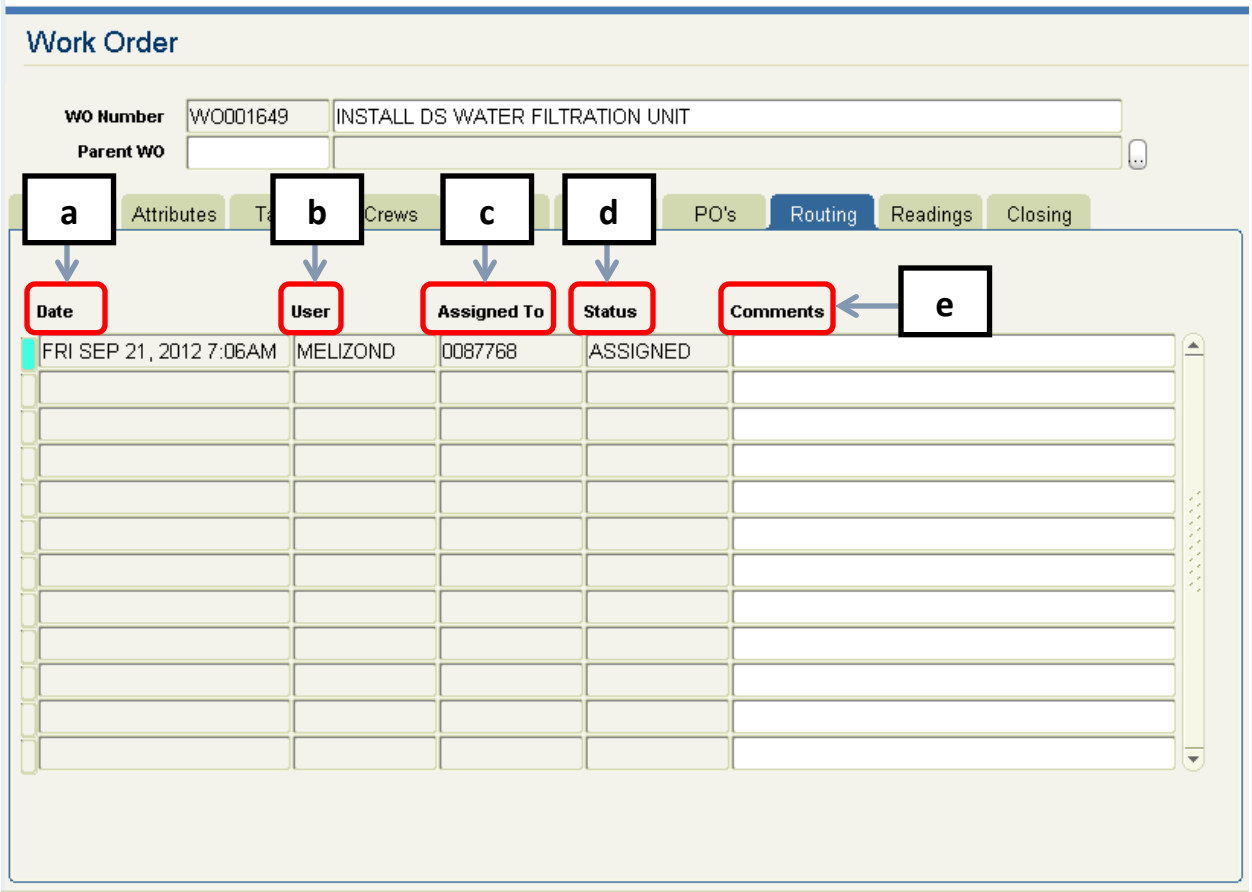


20. PO's tab

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



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:

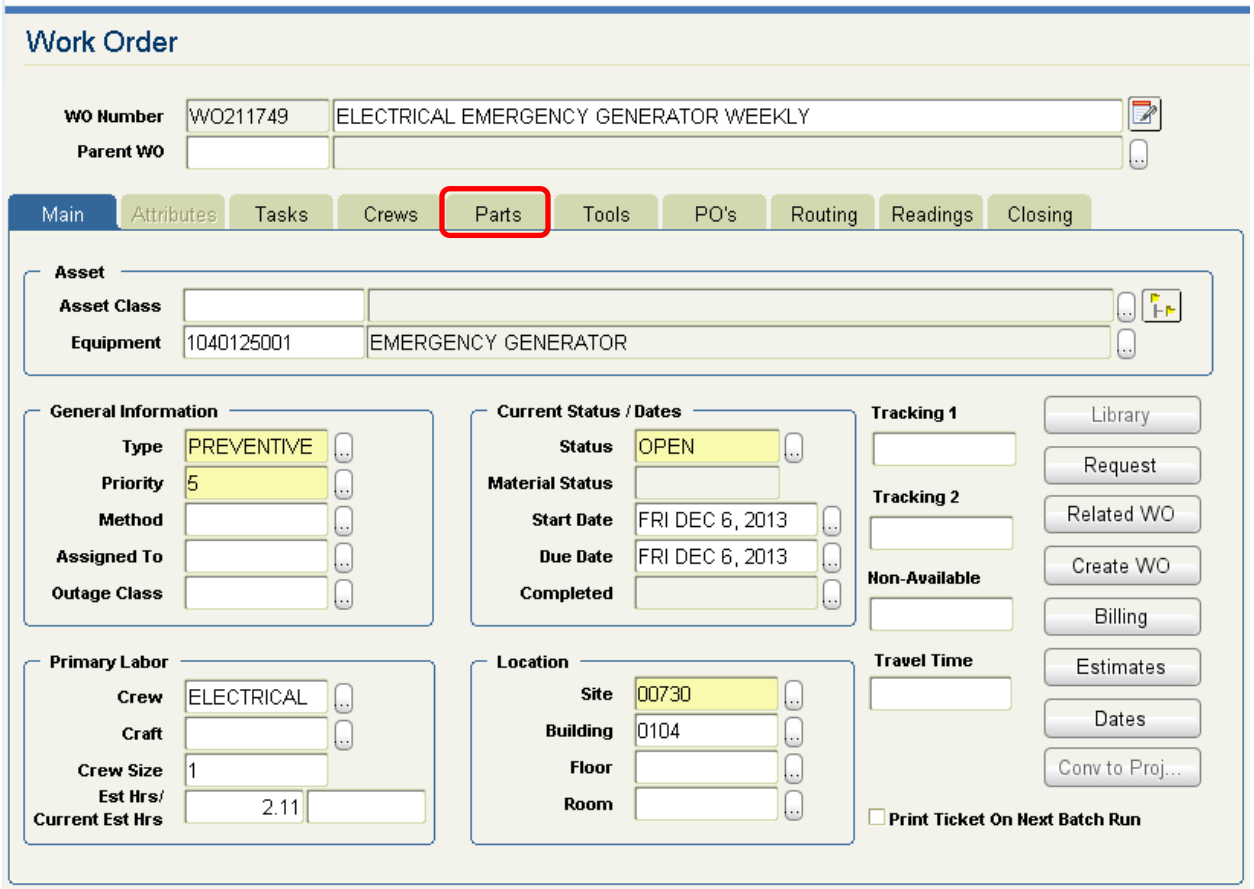
a. Date – displays data and time of routing change
b. User – displays the User ID of the person who made the change
c. Assigned To – displays the Employee ID of the person now assigned to the work order
d. Status – displays status of work order at specified date
e. Comments – enables you to type comments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

Materials

Planning Material for a Work Order

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

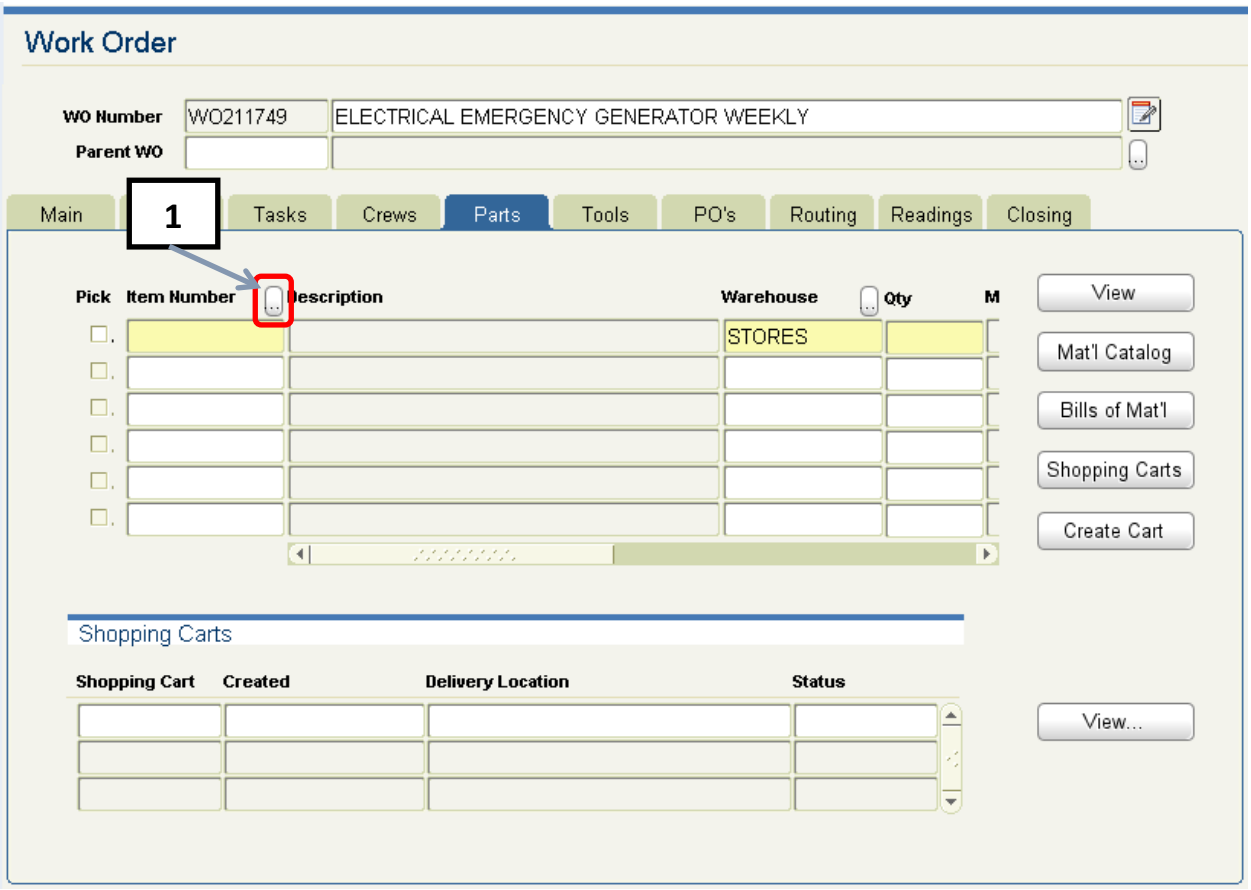
Open specific Work Order form and navigate to the Parts tab



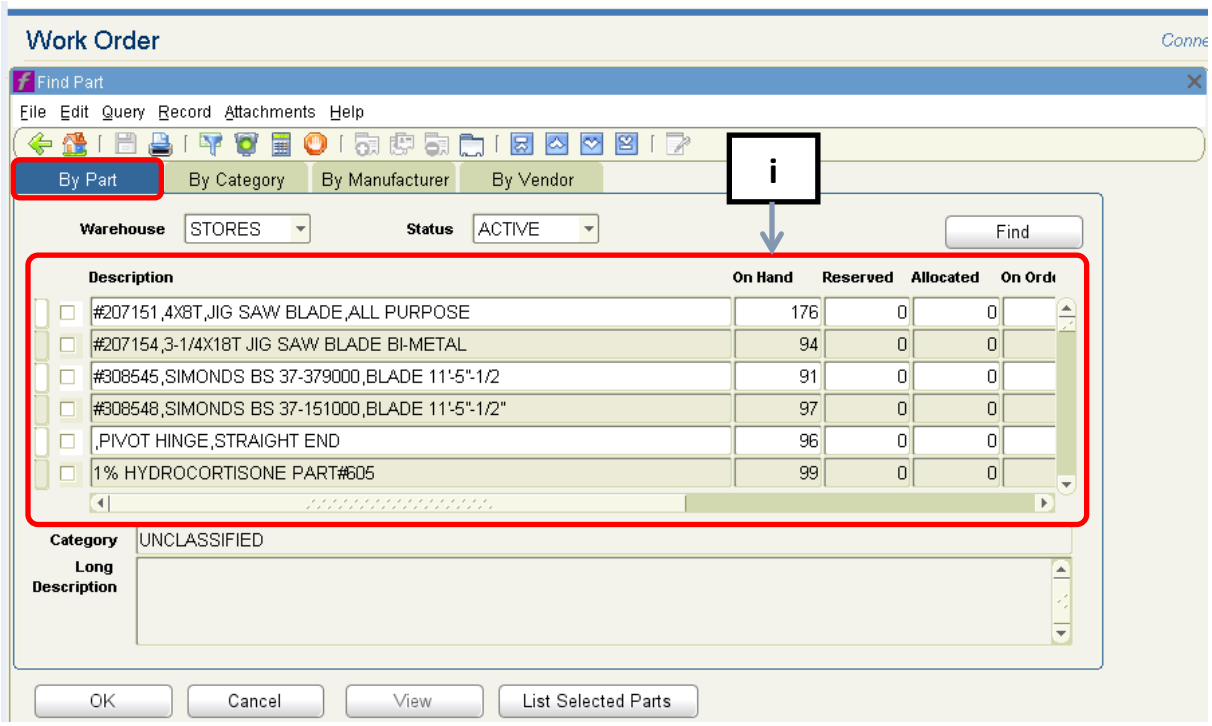
Parts Tab allows you to enter list of parts and material required to perform Work Order for planning purposes

> ***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



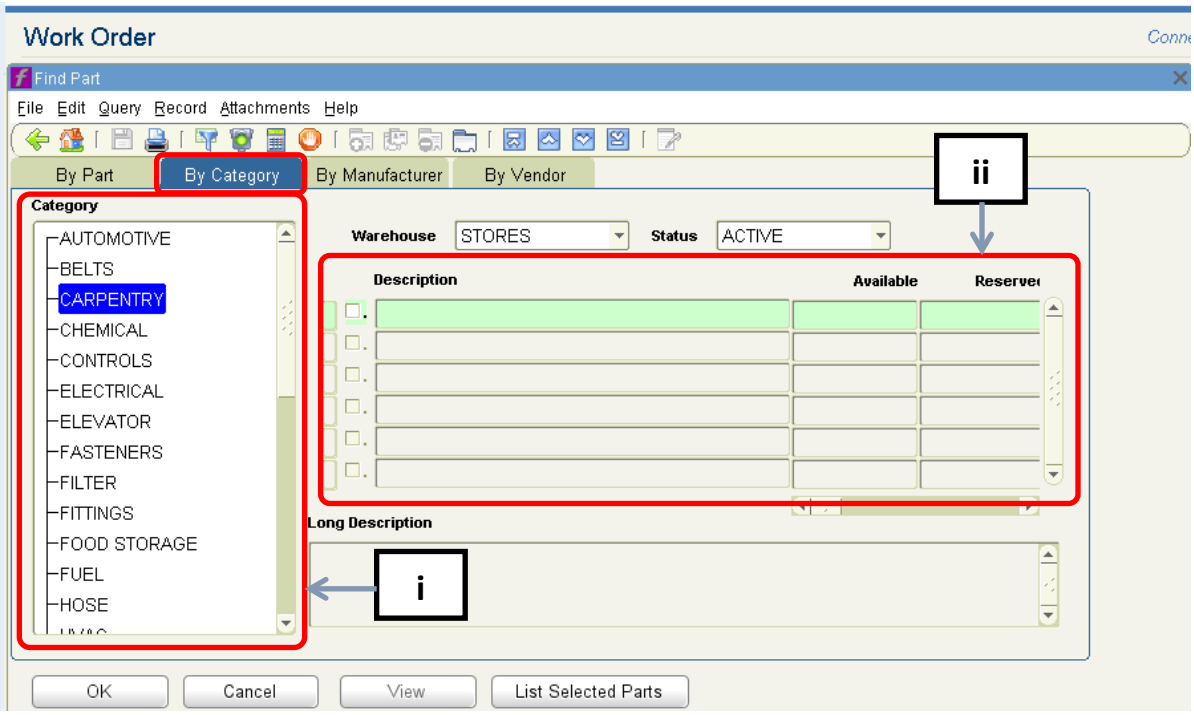
2. The Item Number '...' invokes the window below, allowing you to search, view and select parts in four different ways:
   i. By Part – this tab displays all parts; query to search for specific part
      a. All parts displayed here



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

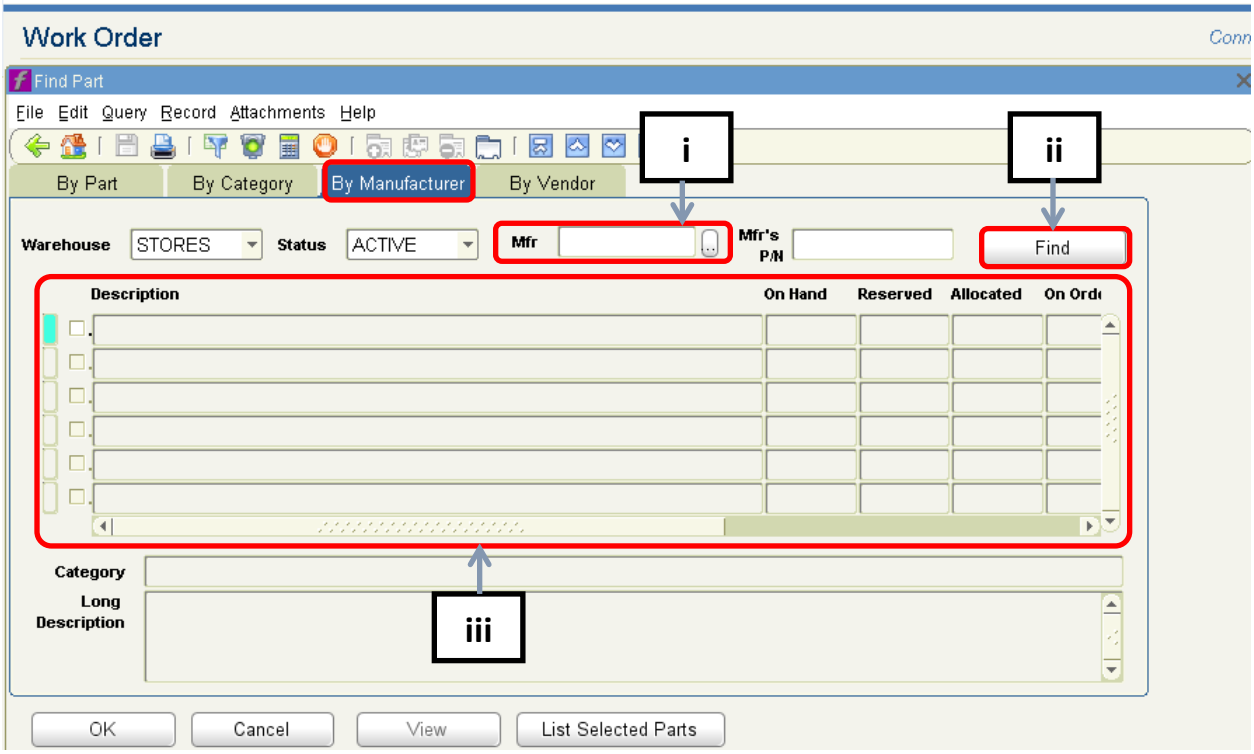


iii. By Manufacturer – this tab lets you search for a part by its manufacturer

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

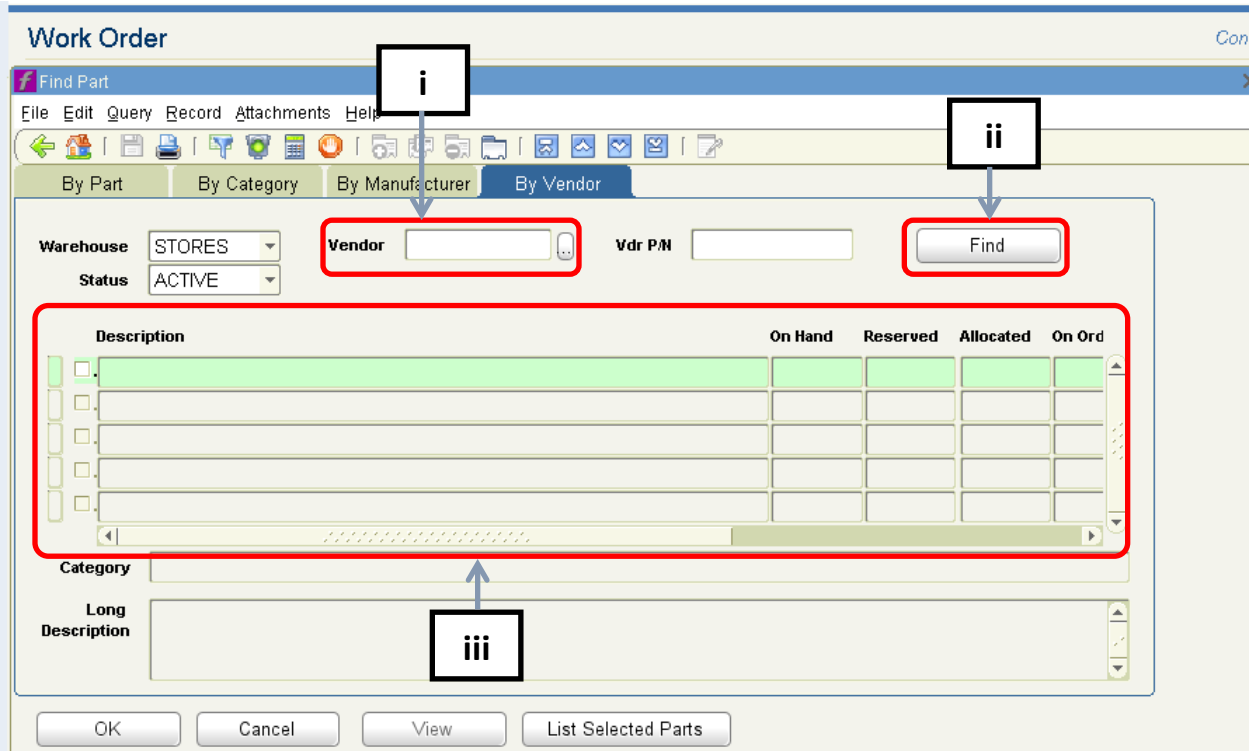


iv. By Vendor – this tab allows you to search for a specific part by its vendor

a. Click '...' to view list of vendors, click OK after selecting a vendor

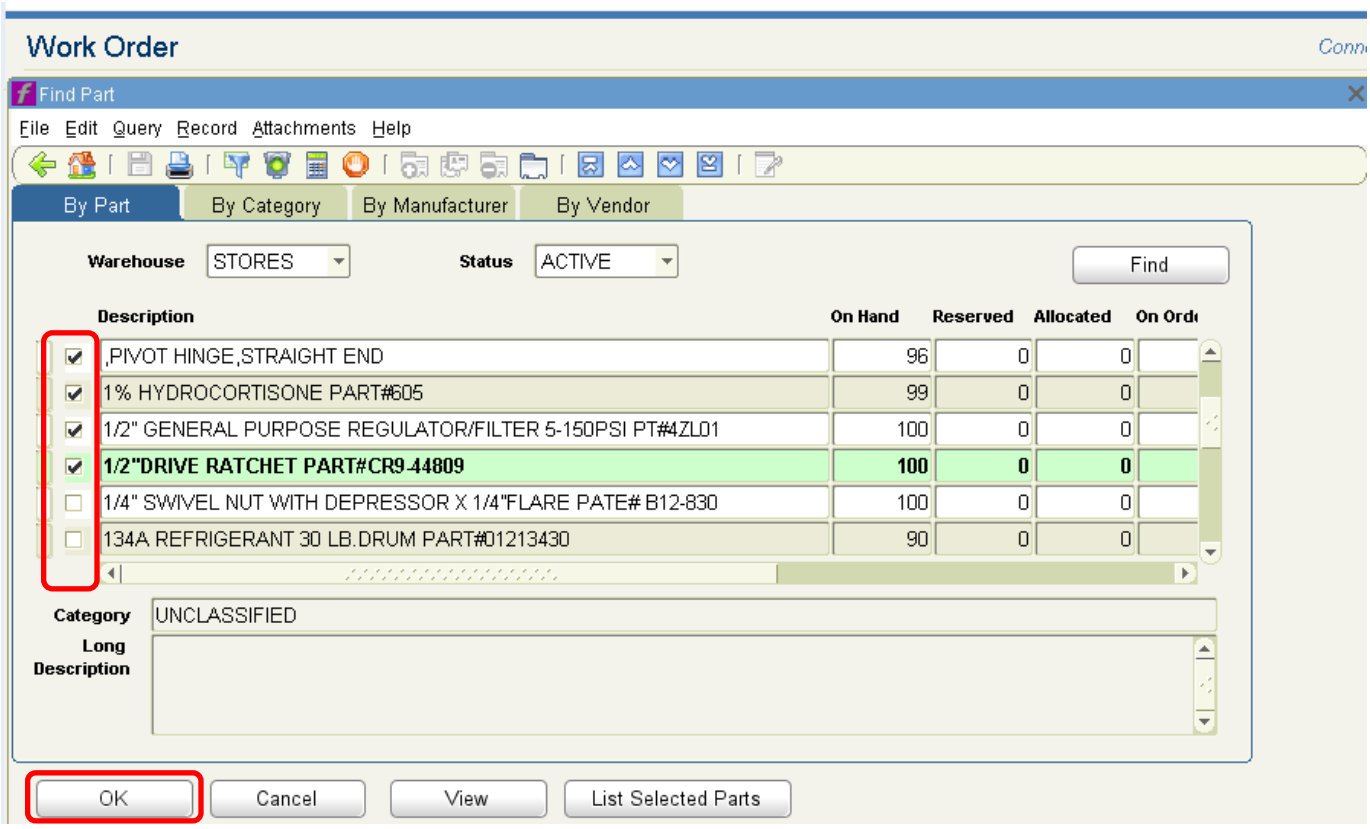
b. Press Find button

c. Select from newly displayed list of parts

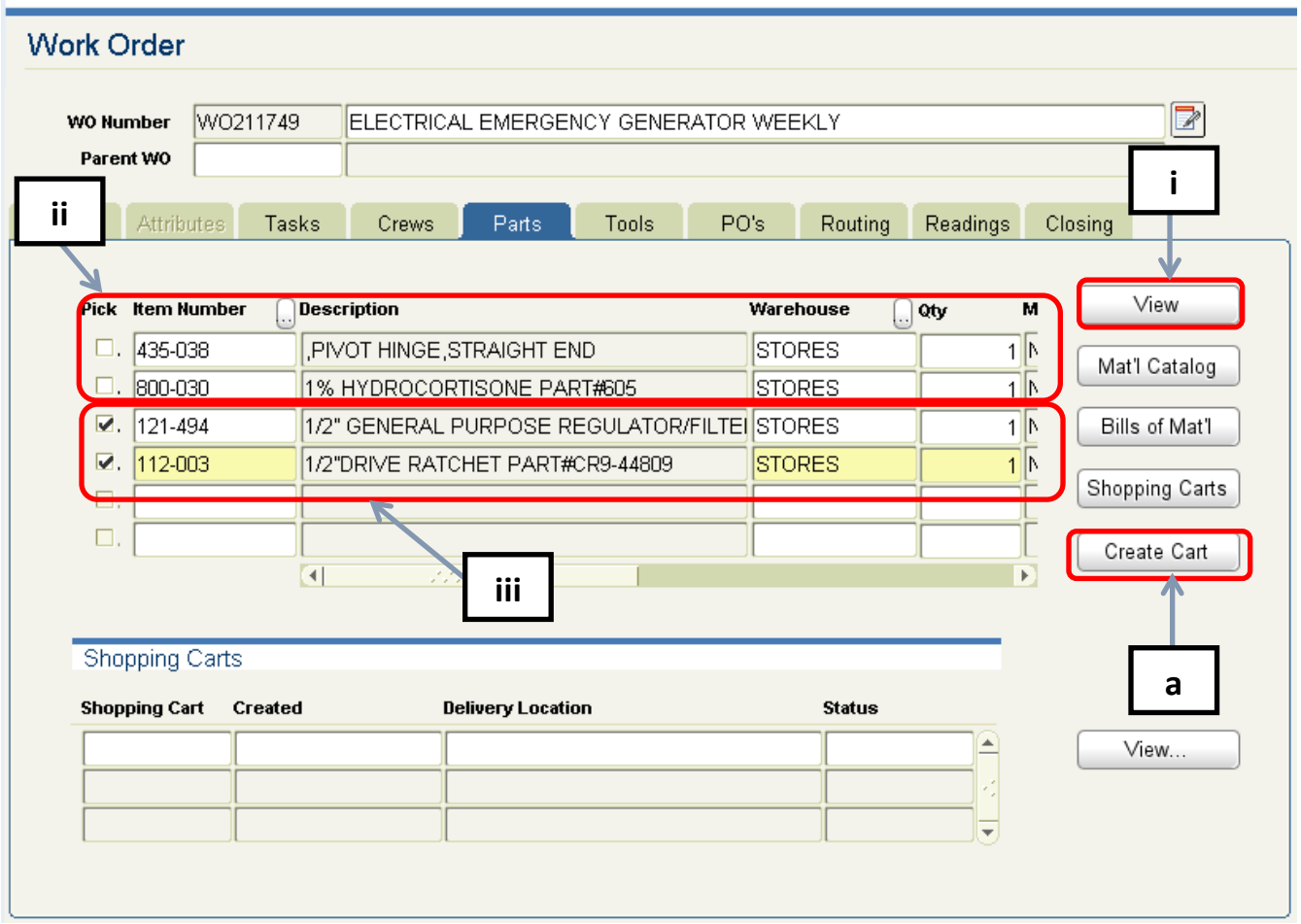


Inventory Purchase with Shopping Cart feature

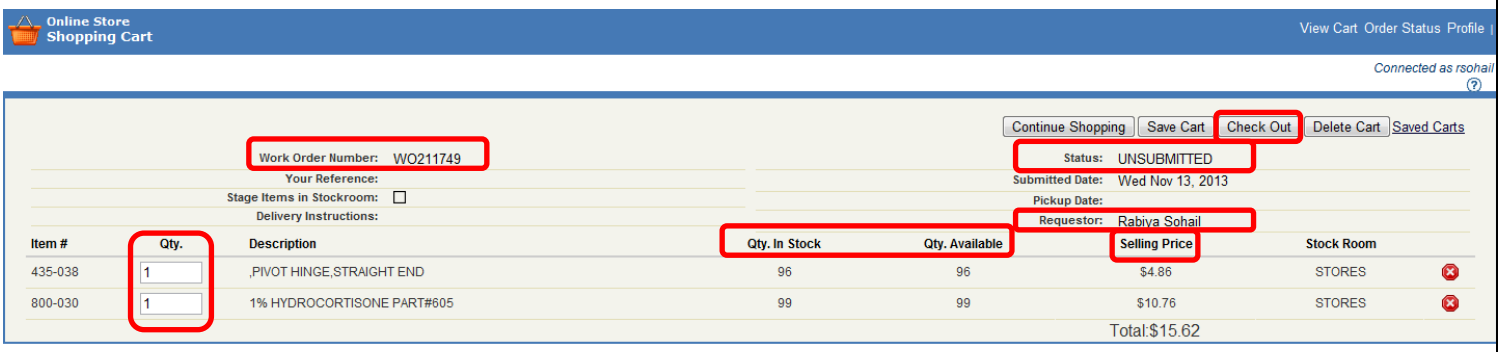
To finally purchase parts, select desired parts by checking box on the right and click OK; in this case we have 4 parts selected



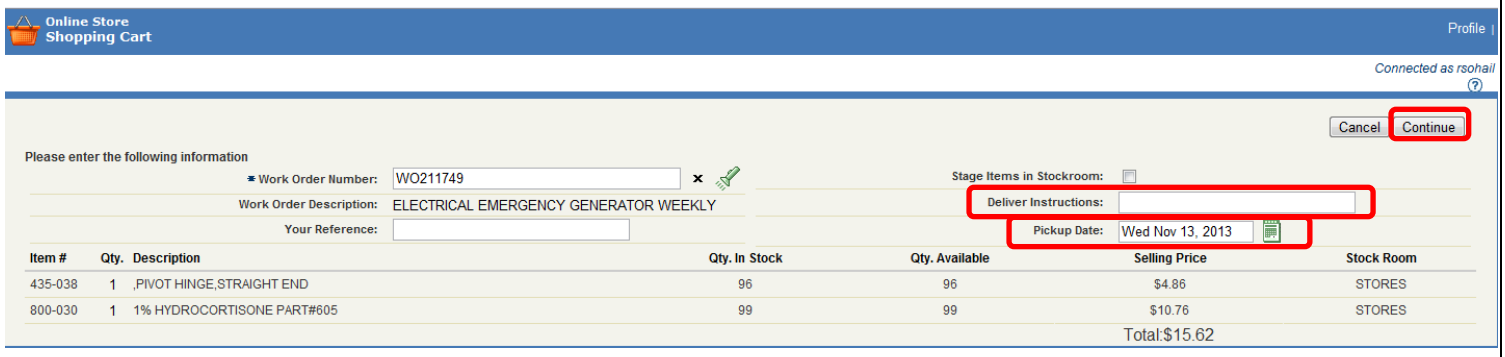
3. Clicking OK returns you back to the Parts tab in the Work Order form; you may use parts for planning purposes or purchasing.
   i. View button allows you to view additional information about the selected part
   ii. Parts for planning purposes
   iii. Parts to be purchased; Pick box checked on the left
      a. To purchase, check the Pick box, and press Create Cart button; this button invokes a new Shopping Cart window



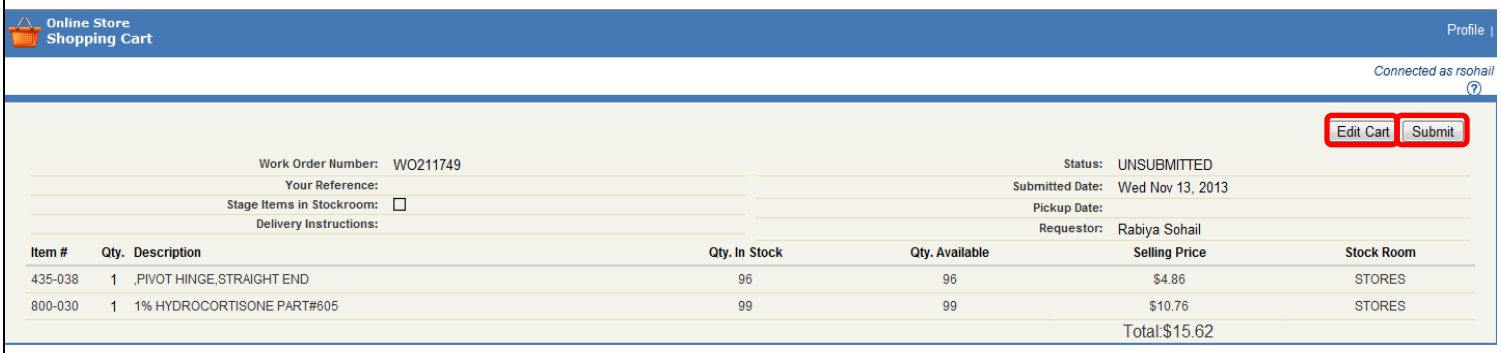
4. View details in the Shopping Car, such as the WO Number, Quantity details, Selling Price, name of Requestor, Status; when ready to proceed, press the **Check Out** button



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

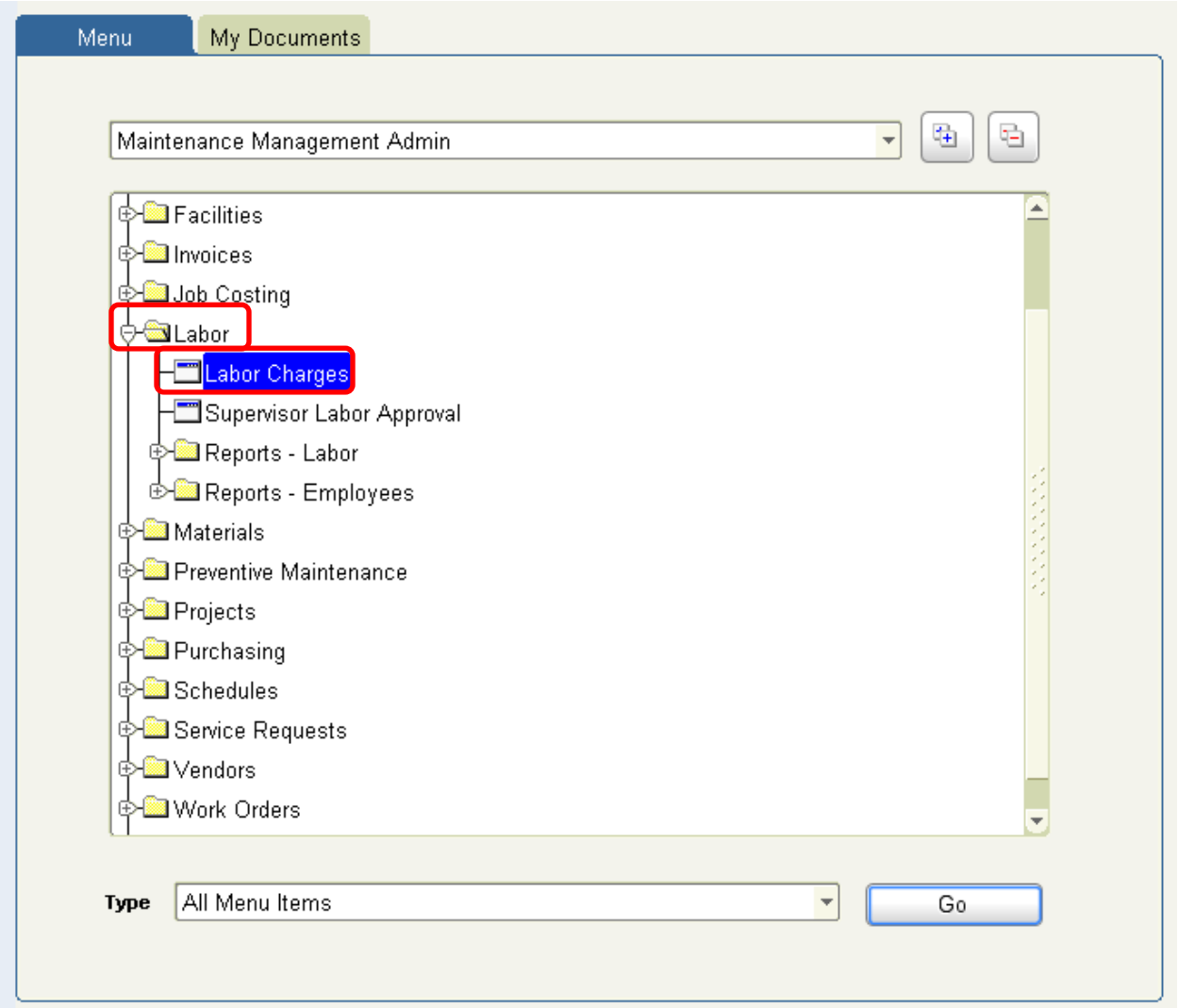


7. Submitted information will reflect in Work Order form in the Parts tab under Shopping Carts.

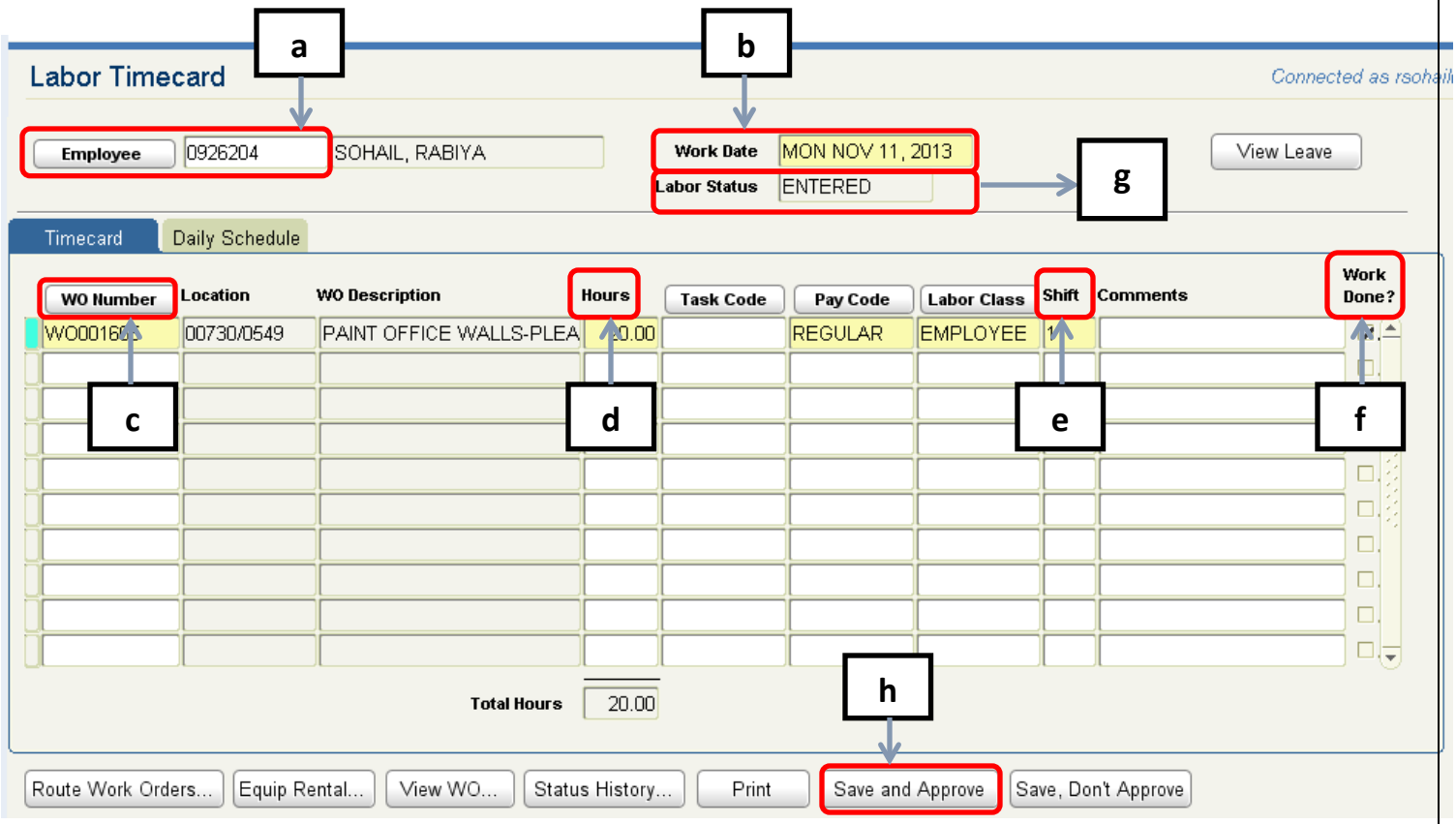
Time Card Entry

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



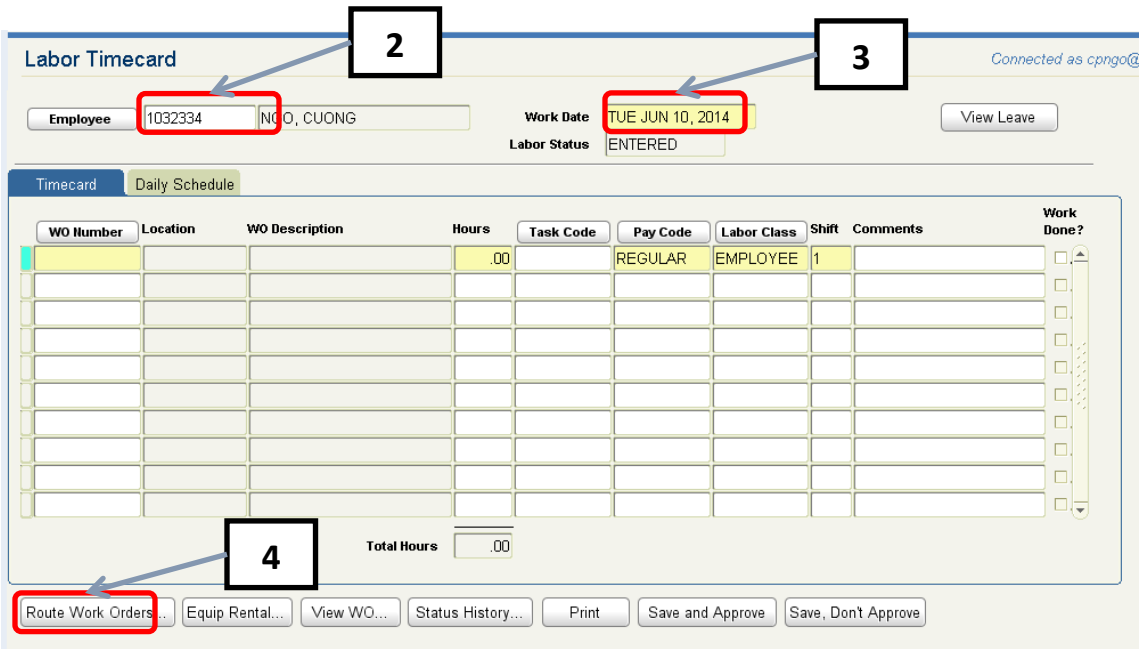
a. Enter Employee ID, employee name will automatically fill in
b. Enter Work Date
c. Enter WO Number of work order performed
d. Enter Hours worked on work order for the day
e. Enter Shift number
f. Check Work Done check box

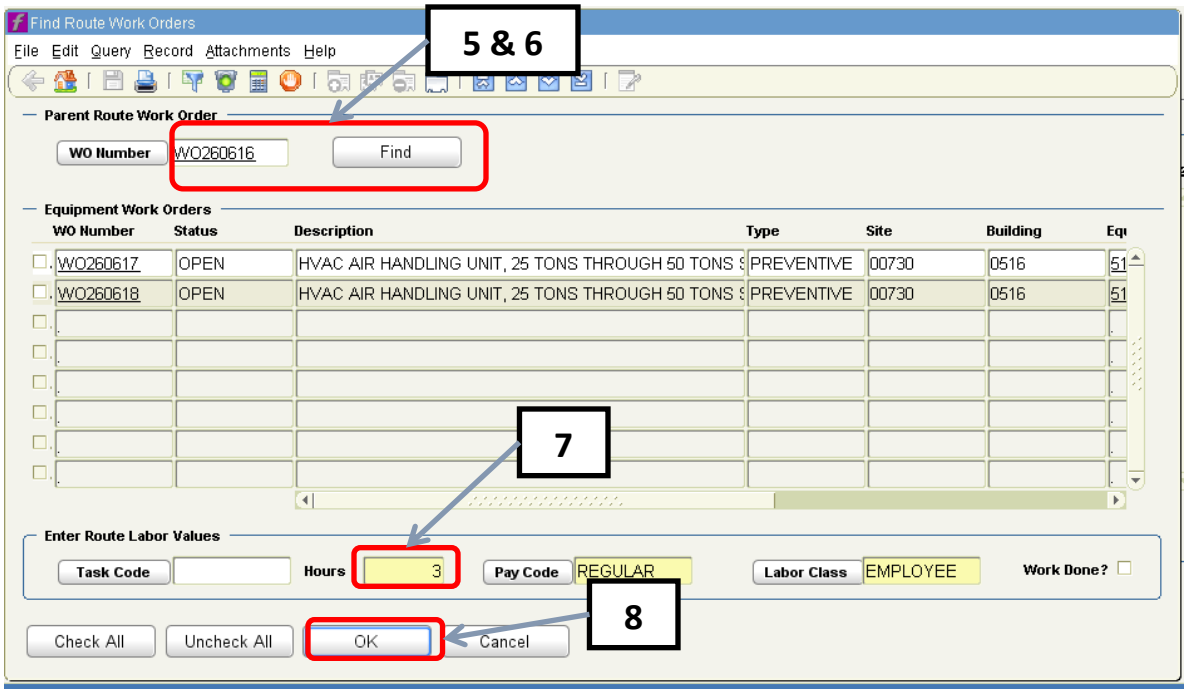
All other fields will automatically fill in.

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

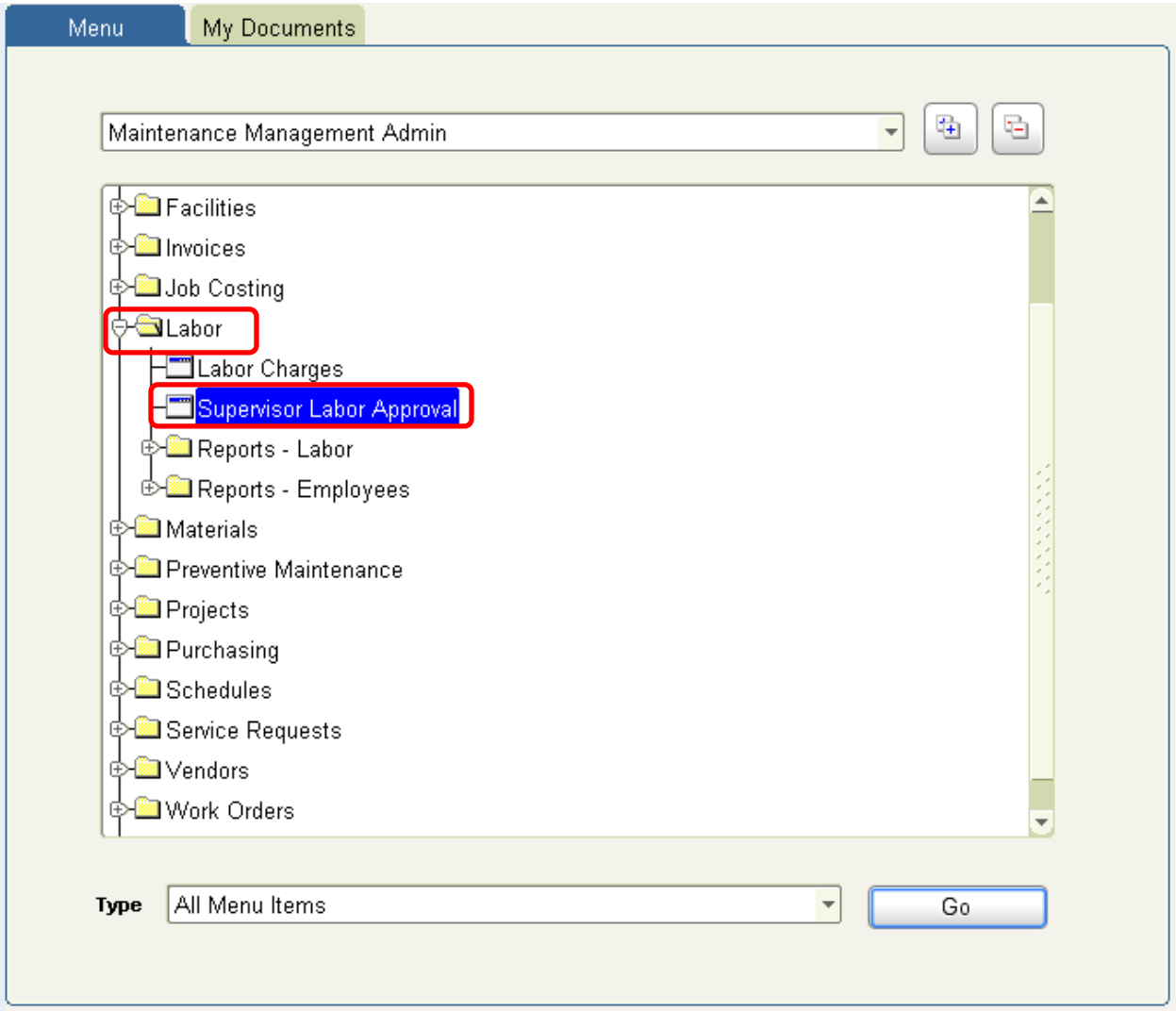
1. Go to the **Labor Timecard form**
2. Enter **Employee number**
3. Enter **Work date**
4. Click on **Route Work Order button**
5. Enter the **parent WO number** of the Route
6. Click **Find button**
7. Enter **total number of hours** the employee worked on the route
8. Click **OK button**

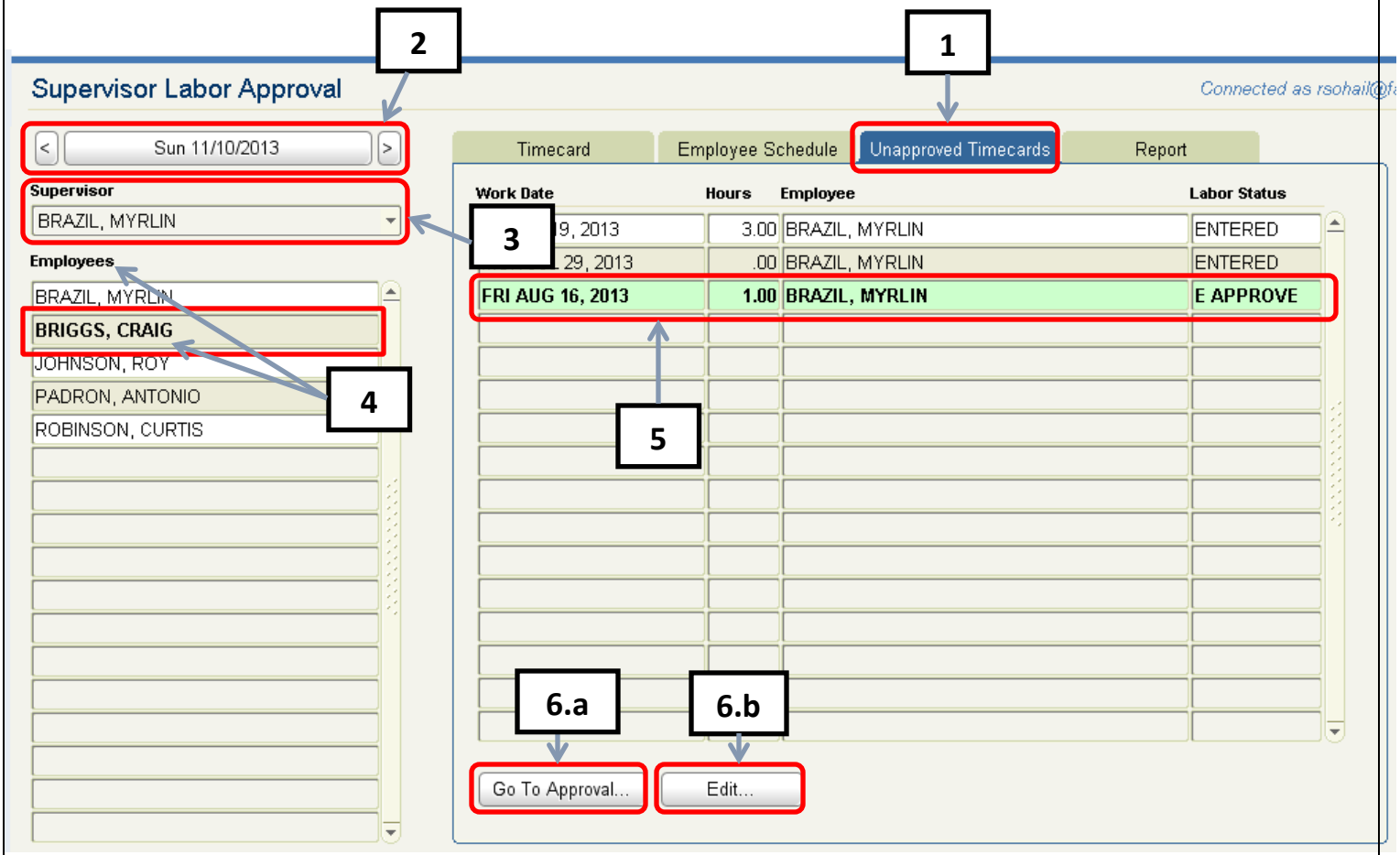




Supervisor Labor Approval

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):

Supervisor Labor Approval

Connected as rsohail@f

Fri 08/16/2013

Supervisor: BRAZIL, MYRLIN

Employees: BRAZIL, MYRLIN; BRIGGS, CRAIG; JOHNSON, ROY; PADRON, ANTONIO; ROBINSON, CURTIS

Timecard | Employee Schedule | Unapproved Timecards | Report

WO Number	Task Code	Status	Pay Code	Labor Class	Reg	Prem	Total
WO211527		E APPROVE	REGULAR	EMPLOYEE	1.00		1.00
				Totals	1.00		1.00

Comments on Labor form

WO Description: ICE MACHINE, FLAKE OR CUBE

Warnings:
- WORK CHARGED TO WORK ORDER NOT SCHEDULED TO THAT EMPLOYEE
- WORK CHARGED TO WORK ORDER NOT FOR THAT CREW
- WORK CHARGED TO WORK ORDER NOT FOR THAT SITE

6.a

Approve... | Reject... | Edit... | History... | View WO...

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.

6.b

Labor Timecard

Connected as rsohail

Employee: 0087750 BRAZIL, MYRLIN

Work Date: FRI AUG 16, 2013

Labor Status: E APPROVE

View Leave

Timecard | Daily Schedule

WO Number	Location	WO Description	Hours	Task Code	Pay Code	Labor Class	Shift	Comments	Work Done?
WO211527	00730/0497	ICE MACHINE, FLAKE OR CU	1.00		REGULAR	EMPLOYEE	1		

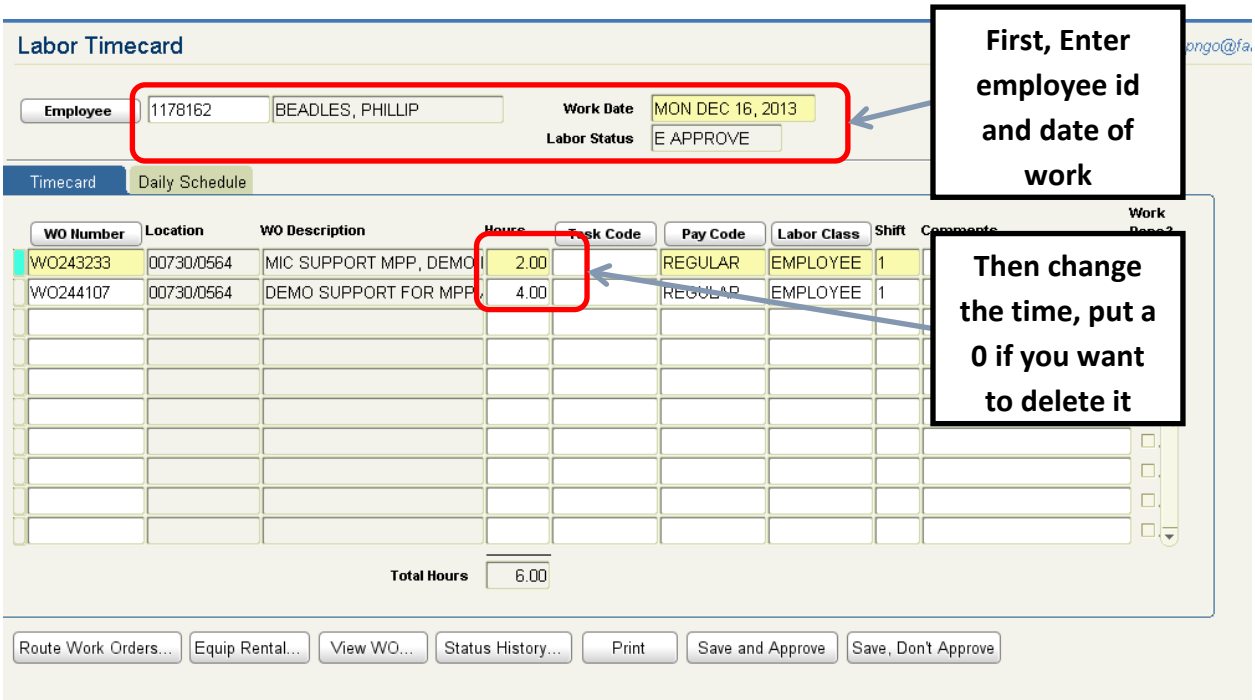
Total Hours: 1.00

Route Work Orders... | Equip Rental... | View WO... | Status History... | Print | Save and Approve | Save, Don't Approve

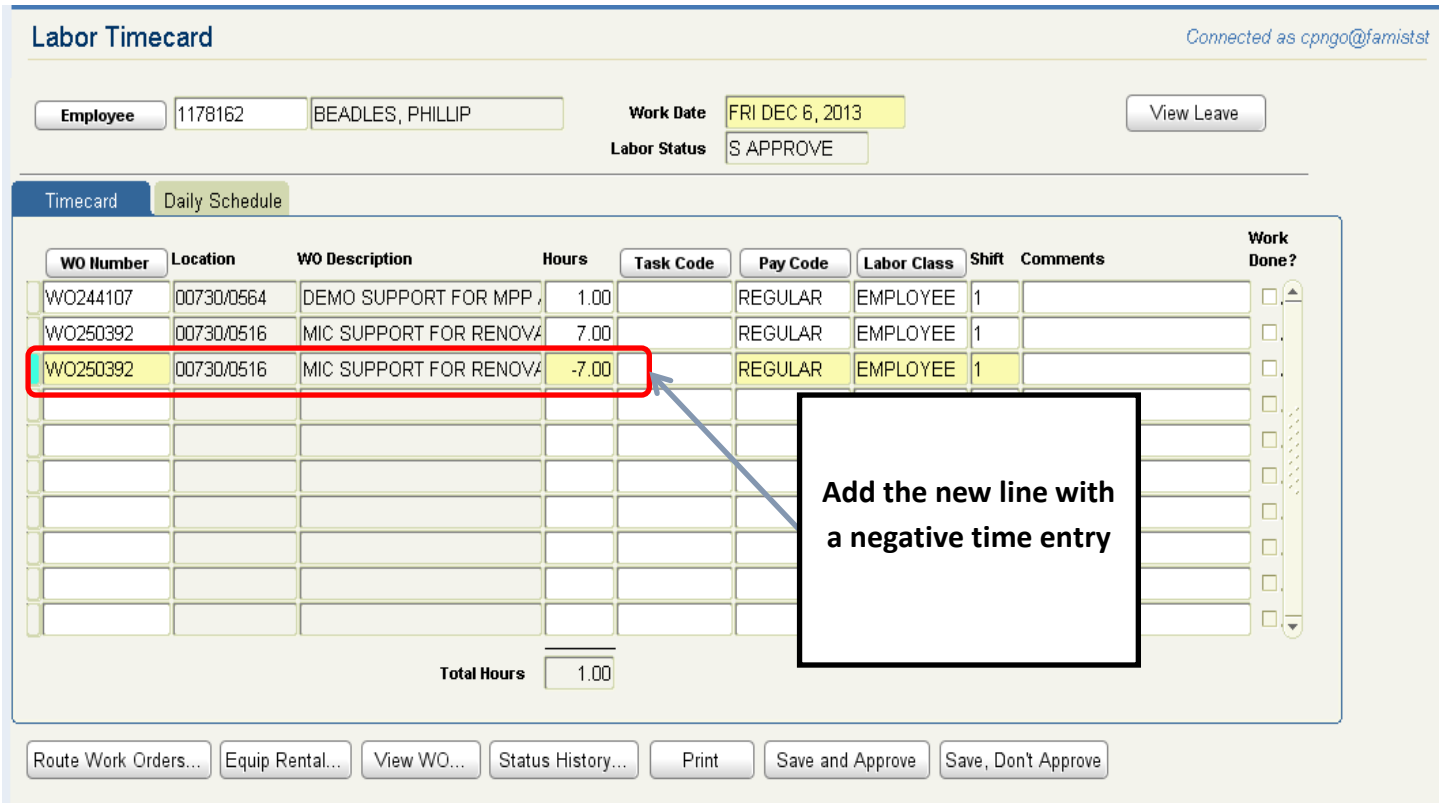
Correct Time Card Entry

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:



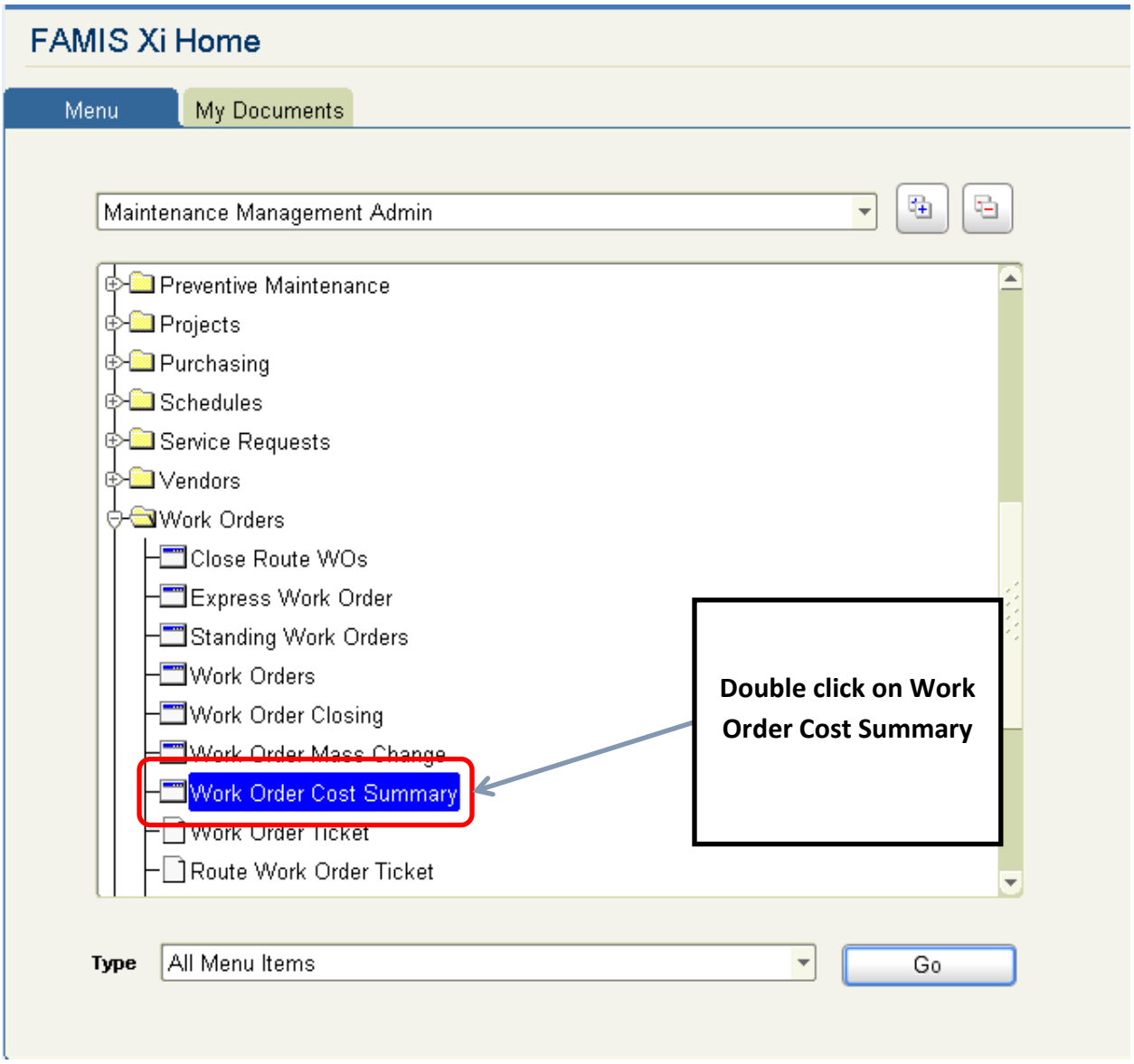
If your time entry is in **S Approve Status**, you need to add another time entry with a negative value:

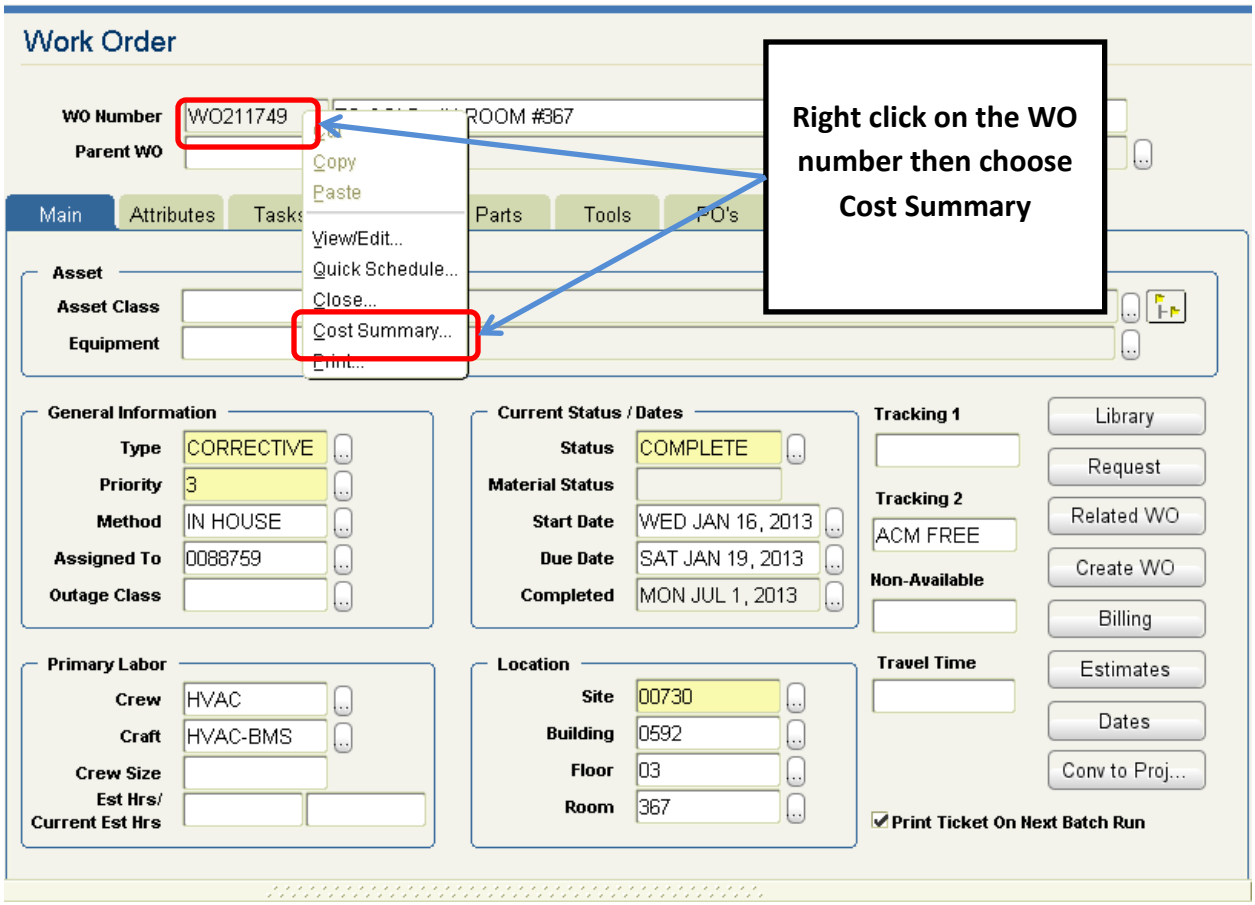


Work Order Cost

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…**

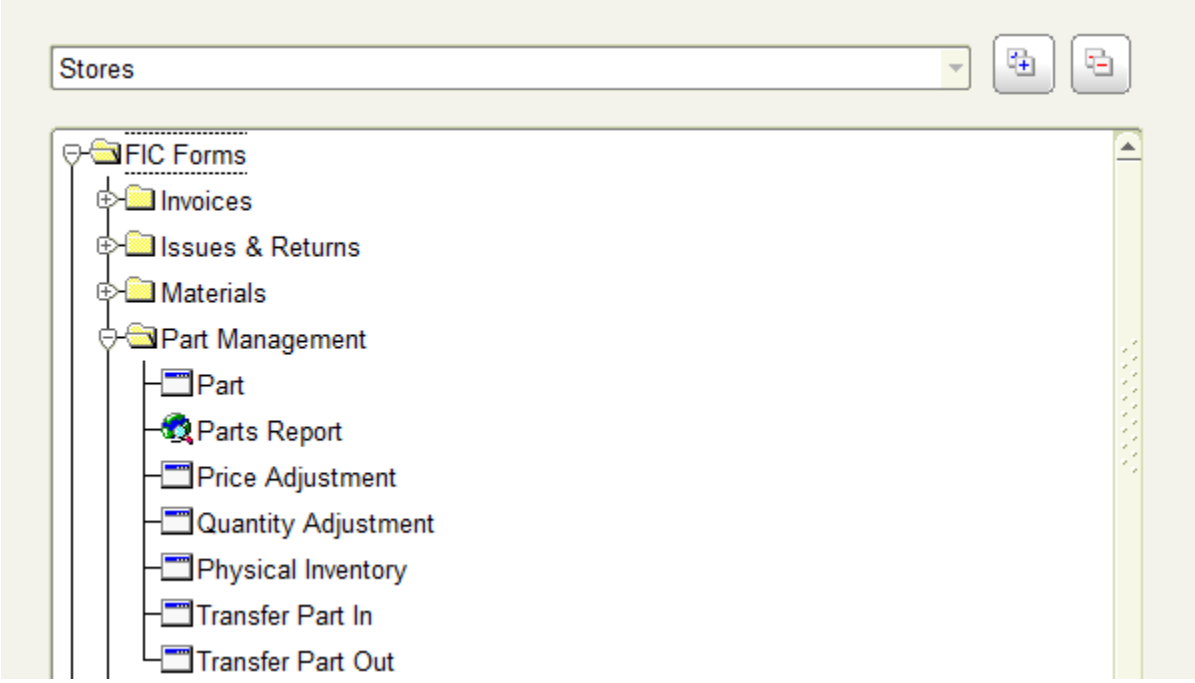



Work Order
WO Number
WO211749
Parent WO
ROOM #367
Copy
Paste
View/Edit...
Quick Schedule...
Close...
Cost Summary...
Print...
Main
Attributes
Tasks
Parts
Tools
PO's
Asset
Asset Class
Equipment
General Information
Type
CORRECTIVE
Priority
3
Method
IN HOUSE
Assigned To
0088759
Outage Class
Current Status / Dates
Status
COMPLETE
Material Status
Start Date
WED JAN 16, 2013
Due Date
SAT JAN 19, 2013
Completed
MON JUL 1, 2013
Tracking 1
Tracking 2
ACM FREE
Non-Available
Travel Time
Library
Request
Related WO
Create WO
Billing
Estimates
Dates
Conv to Proj...
Primary Labor
Crew
HVAC
Craft
HVAC-BMS
Crew Size
Est Hrs/
Current Est Hrs
Location
Site
00730
Building
0592
Floor
03
Room
367
Print Ticket On Next Batch Run
Right click on the WO number then choose Cost Summary

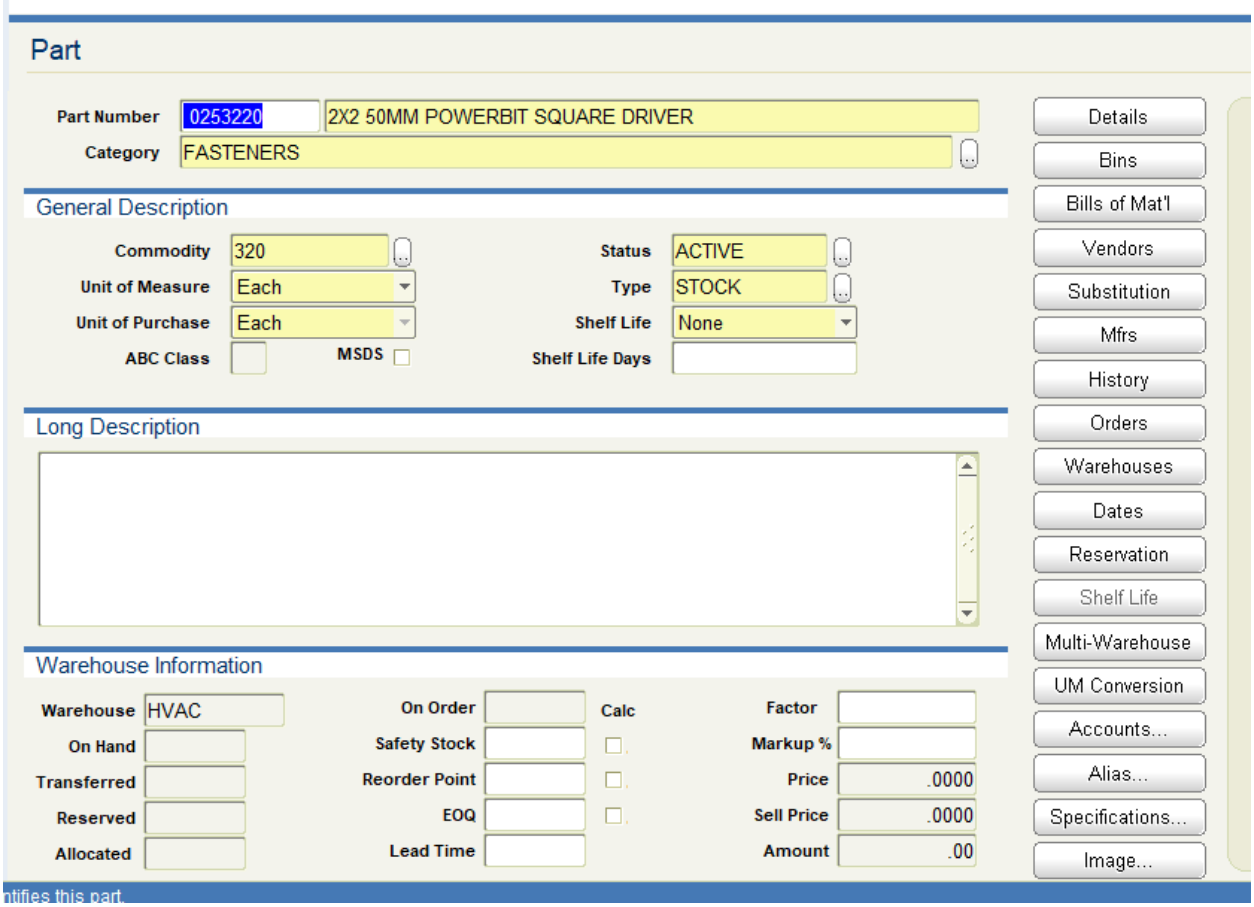
Overview of Parts Management

Creating Parts

1. Go under the “FIC FORMS” folder
2. Go under the “Part Management” folder
3. Double click on the “Part” form



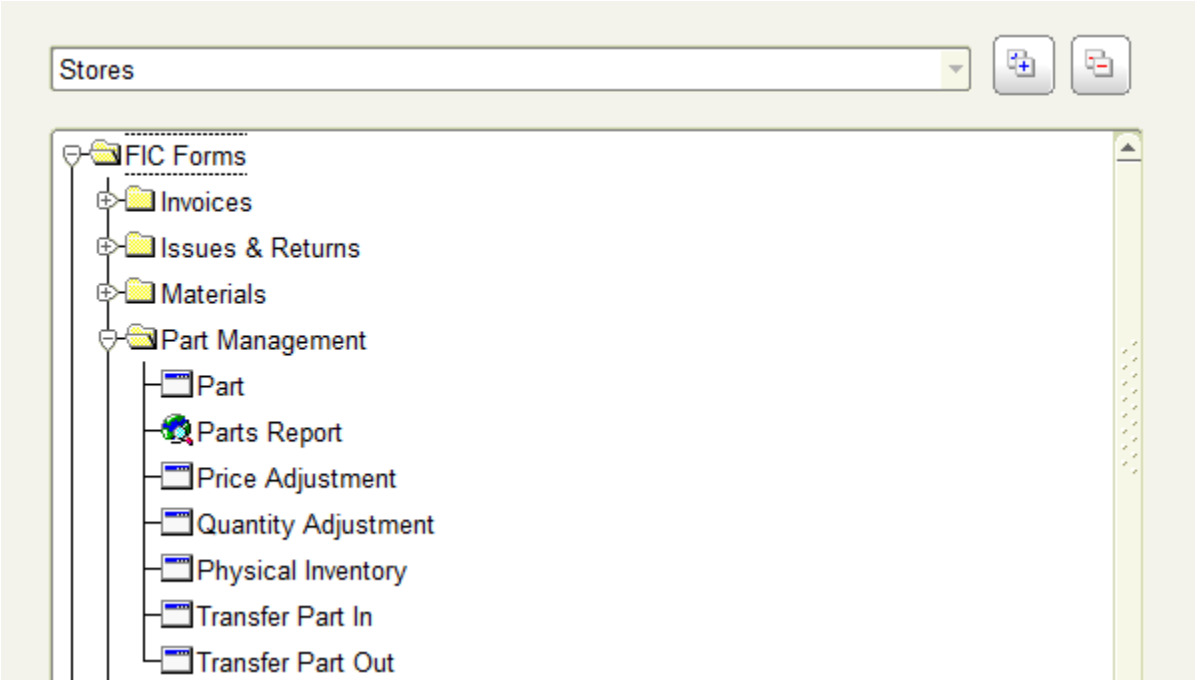
4. Fill in yellow required fields.
5. Hit Save.



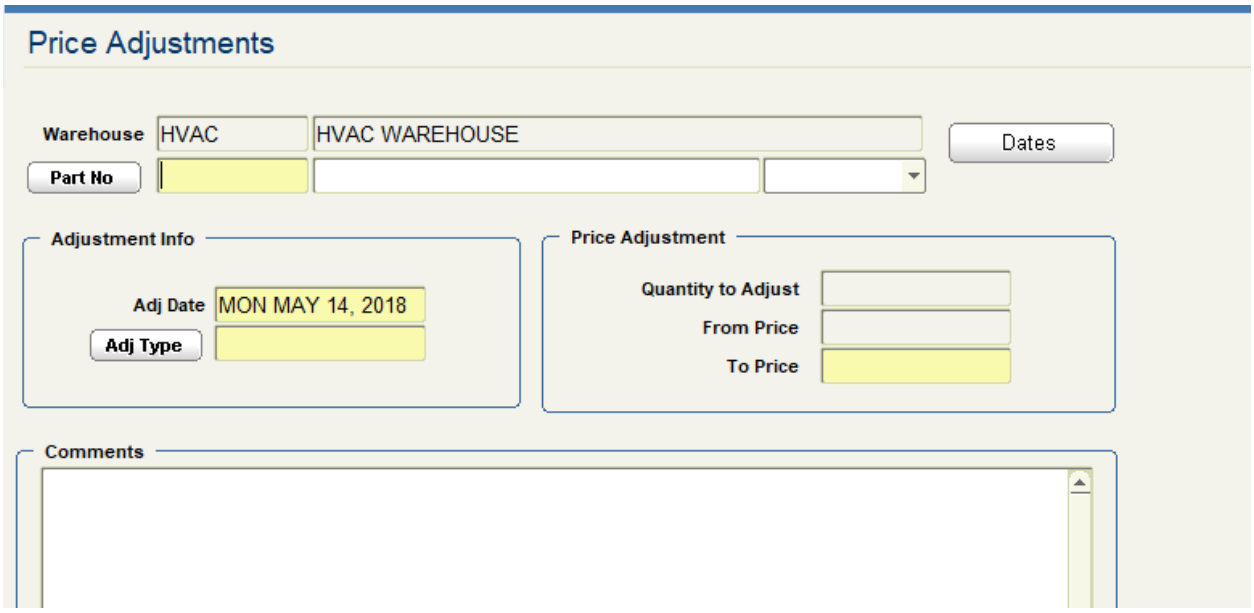
Adjusting Quantity and Price

1. Go under the “FIC FORMS” folder
2. Go under the “Part Management” folder

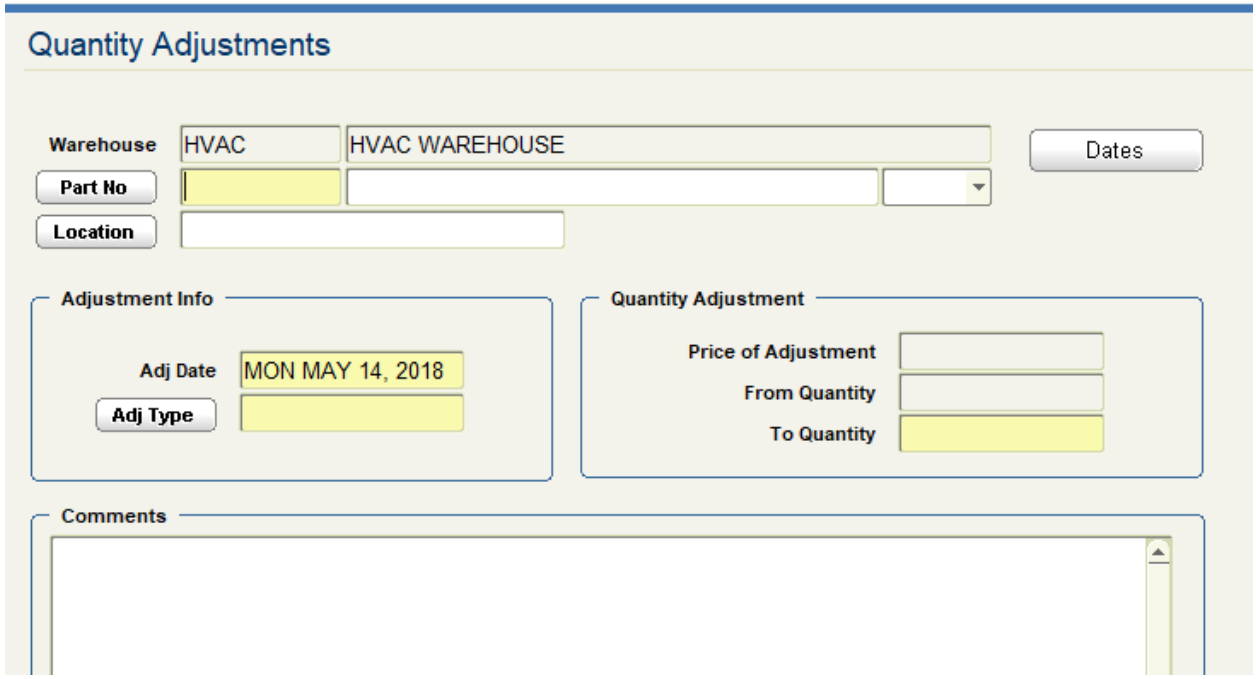
3. Double click on either “Price Adjustment” or “Quantity Adjustment”



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

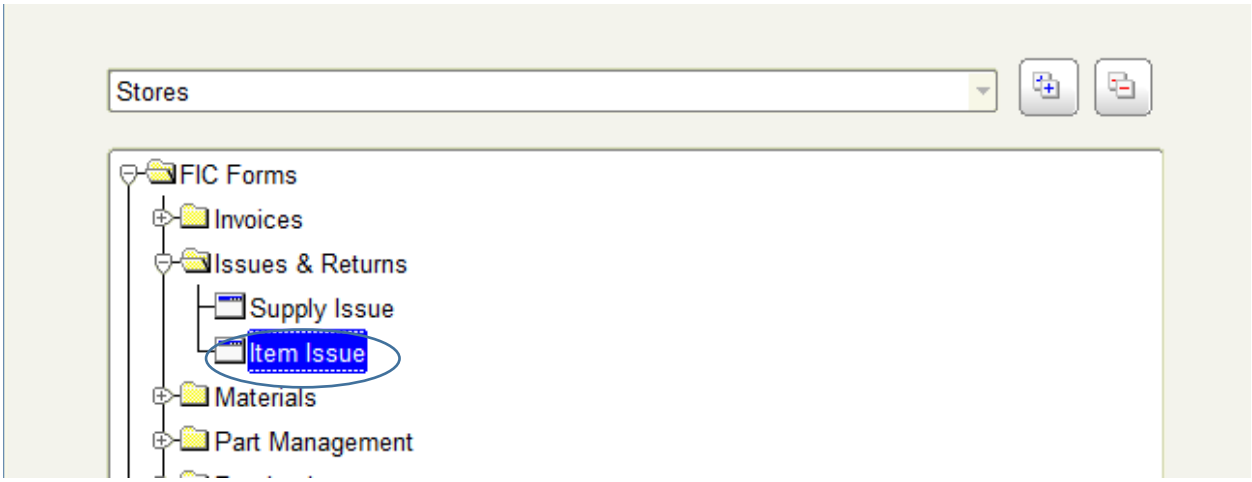


5. For Quantity Adjustment Form”, enter Part Number, Adj Type, and New quantity

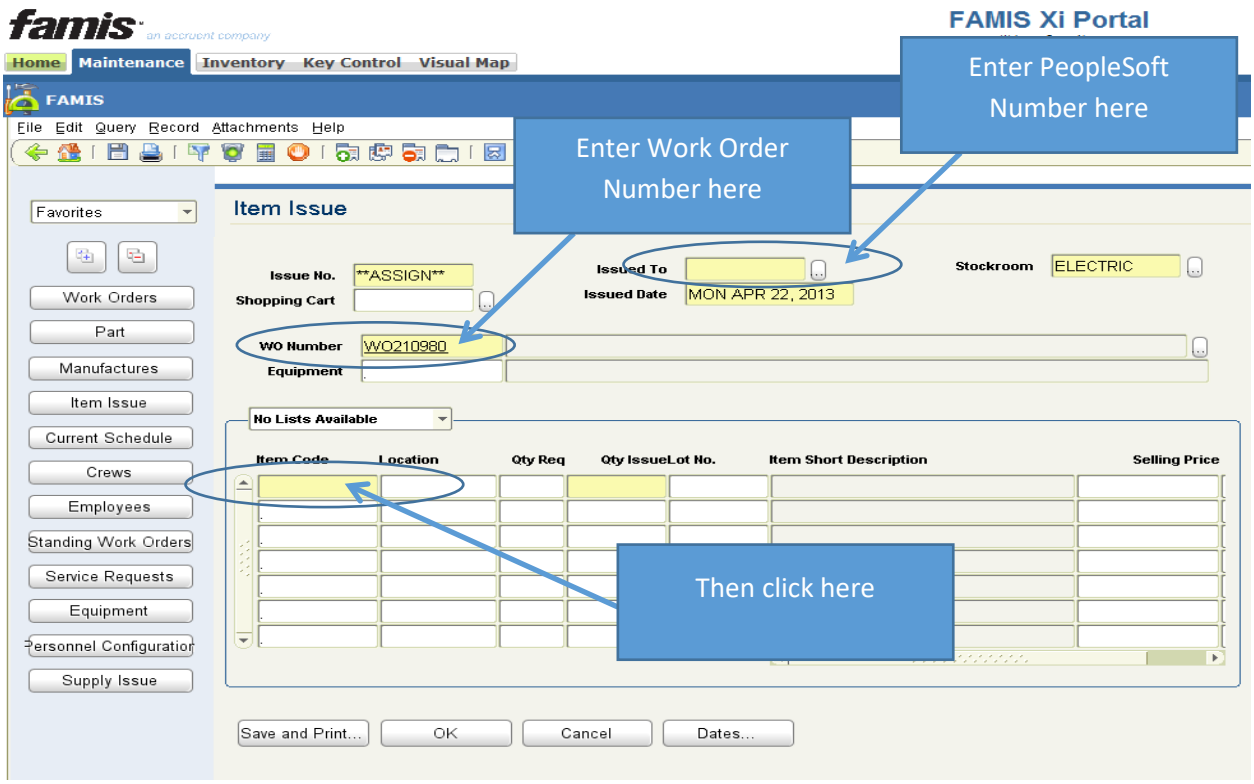


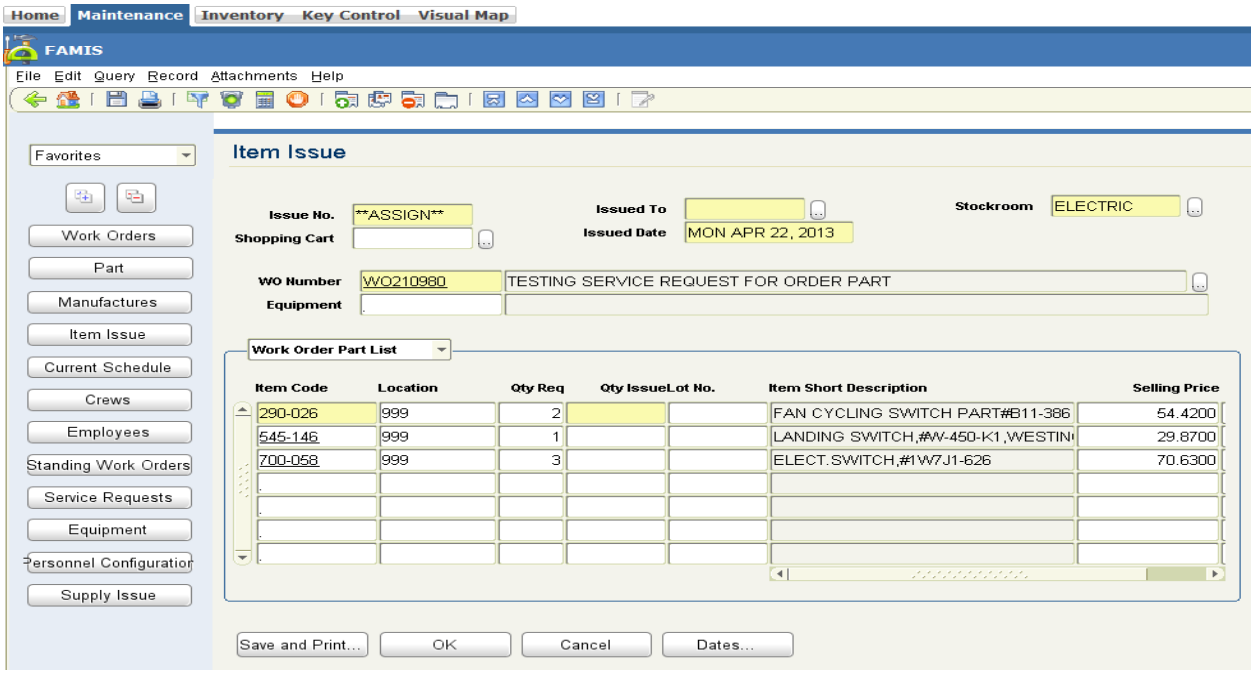
Issue Parts to Work Order

Step 1: Go to the Item Issue form under **Stores -> FIC Forms -> Issues & Returns -> Item Issue**

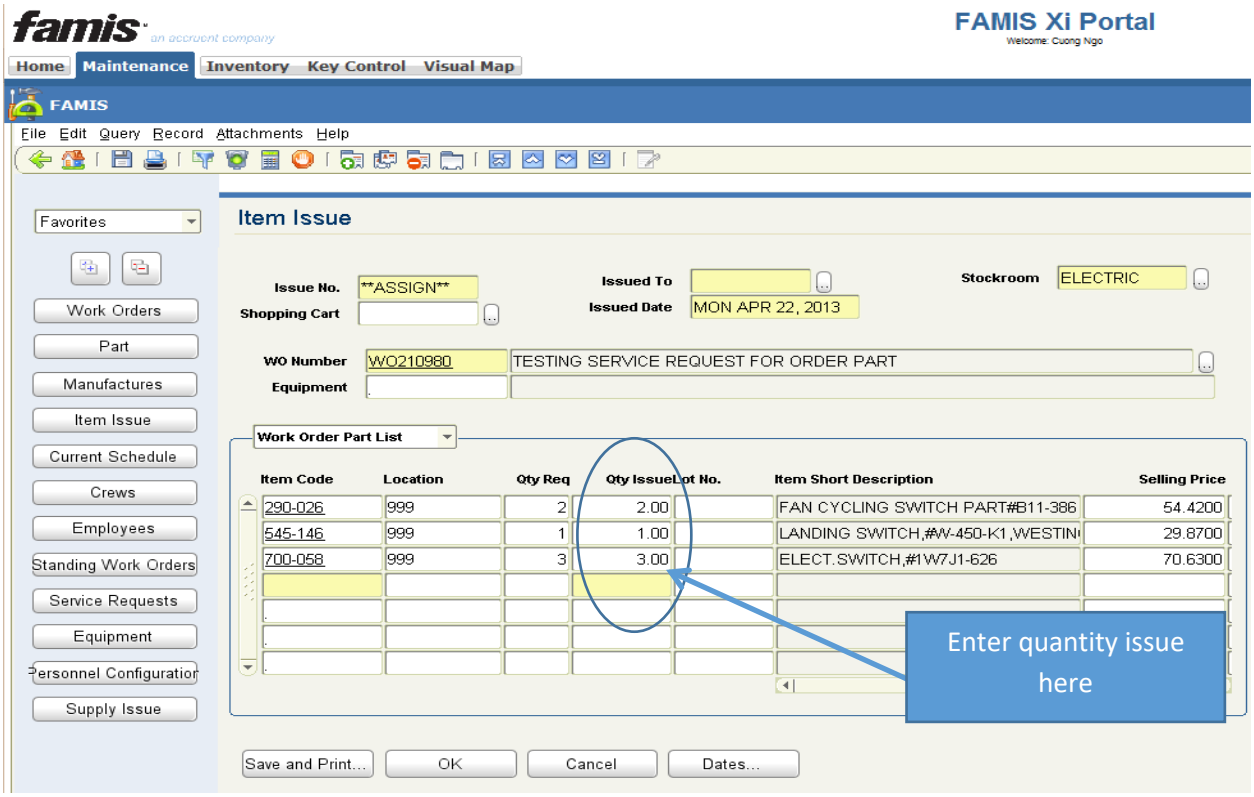


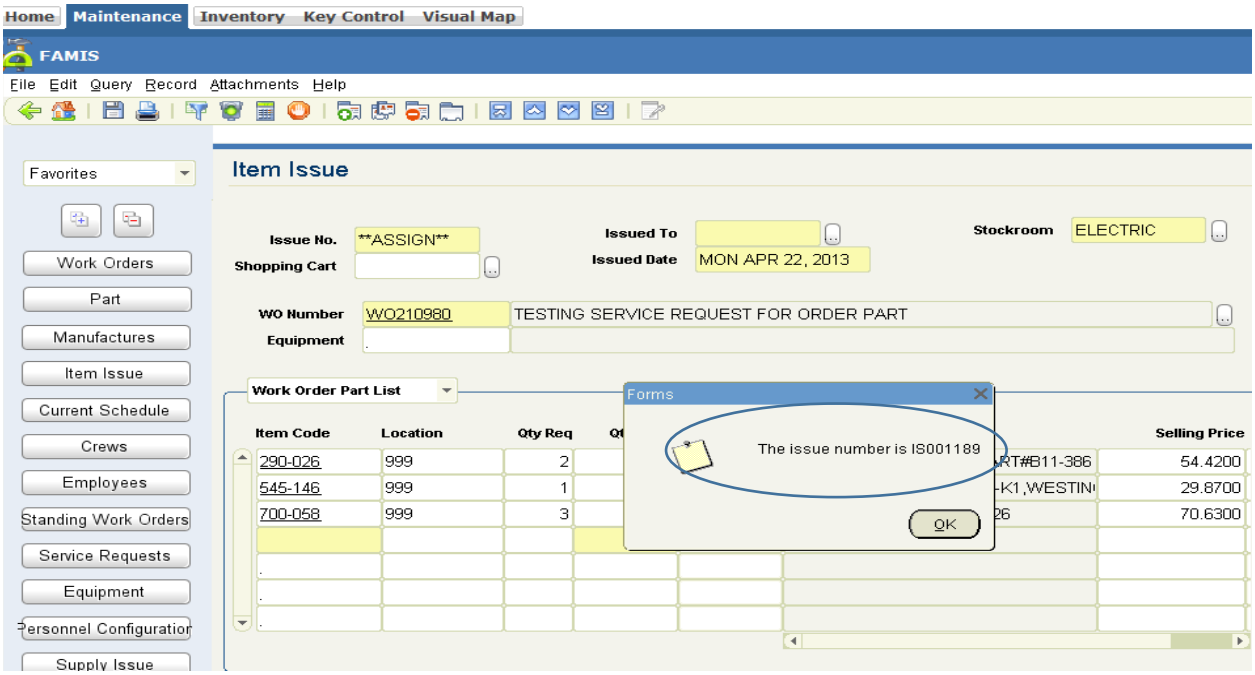
Step 2: Enter the PeopleSoft Number of the employee you are issuing the parts to under the Issued To field. Enter Work Order number in WO Number field, and then click on the Item Code fields. Enter the Part Numbers needed for the Work Order:





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:

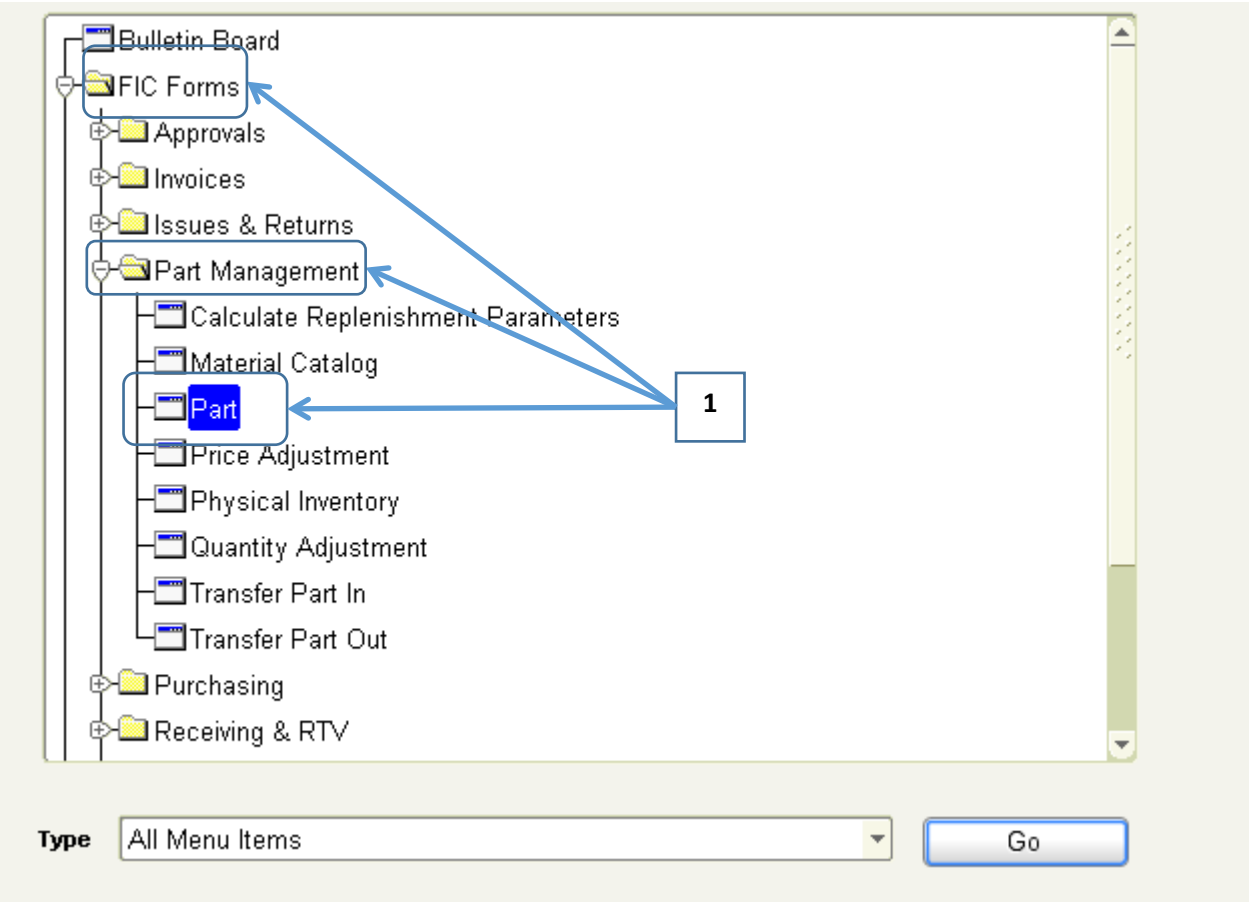




Overview of Non-inventory purchasing process

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.



File Edit Query Record Attachments Help

Quickpicks

Buyer's Workbench

Part

Connected as ldang2@f

Part Number: P1065 — PVCJWE10041 #10 45 W/INSERT ZESTON 2000 PC PIPE FITTING

Category: HVAC

General Description

Commodity	031	Status	ACTIVE
Unit of Measure	Each	Type	NON-STOCK
Unit of Purchase	Each	Shelf Life	None
ABC Class		Shelf Life Days	
MSDS	☐		

Long Description

PVCJWE10041 #10 45 W/INSERT ZESTON 2000 PC PIPE FITTING

Warehouse Information

Warehouse	STORES	On Order	.00	Factor	
On Hand		Safety Stock		Markup %	
Transferred		Reorder Point		Price	
Reserved	.00	EOQ		Sell Price	
Allocated	.00	Lead Time		Amount	.00

Calc ☐ ☐ ☐

Details
Bins
Bills of Mat'l
Vendors
Substitution
Mfrs
History
Orders
Warehouses
Dates
Reservation
Shelf Life
Multi-Warehouse
UM Conversion
Accounts...
Alias...
Specifications...
Image...

10

ATTACHMENTS
Notes (0)
Documents (0)
E-Mail (0)

A number that uniquely identifies this part.

FAMIS

File Edit Query Record Attachments Help

Quickpicks

Buyer's Workbench

Accounts

File Edit Query Record Attachments Help

Account Group Name: Part Warehouse Acct Group

Account Details

Chart of Accounts: STANDARD

Speed Type: 17959

Description:

Business Unit: 00730

Fund Code: 2060

Department ID: H0185

Program: F1102

Project ID: NA

OK Cancel

Enter a chart of accounts code.

Record: 1/1 | ... | List of Valu... | <O

Dates... Audit...

Attrit

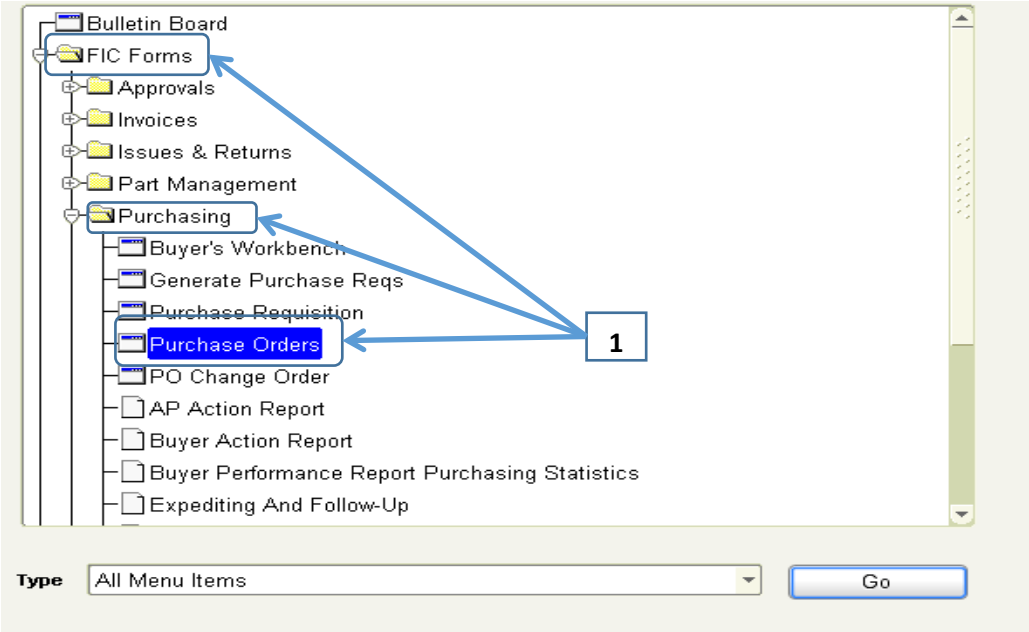
Factor
Markup %
Price
Sell Price
Amount .00

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.



Purchase Order

Connected as cpngo@famistst

PO Number **ASSIGN**

ENTER A BRIEF DESCRIPTION OF THIS PO HERE

PA Number

Supplier 0000006378 3D INTERNATIONAL INC

Purchase Site 1

General | Lines | Insurance

Purchase Type NON_INVEN

Status OPEN

Freight Terms

Payment Terms

Currency USD

Retention %

Buyer

Drop Ship

Ship Via

Preq No

Requester

Deliver To... | Dates... | Audit... | Print... | Chg Orders... | Invoices... | RTVs... | Receipts...

Supplier Confirmed

Batch Print

Print Notes on Same Page

	Pre-Tax	With Tax & Rebates
Original PO		
Current PO		
Net Invoiced To Date		
Remaining PO		

ATTACHMENTS

Notes (0)

Documents (0)

E-Mail (0)

2

3

4

5

6

Purchase Order

Connected as cpngo@famistst

Line Detail - PO0051[illegible]3 Line 1

File Edit Query Record Attachments Help

General Information

Preq No.

Line

WO Number WO000009

Crew

Stockroom STORES

Item P1004

Commodity

Status & Dates

Status OPEN

Org. Required

Cur. Required

Promised

Last Rec'd

Advise

Urgent ?

Description of Items or Services

Supplier Item No.

Manufacturer

Brand

Mfr Part No

Description THIS IS THE BRIEF DESCRIPTION OF THE PART. THIS IS THE LONG

Allow Substitutions

Quantity and Cost

UOP Each

Tax Group

Quantity 1.00

Original Unit Price 10.0000

Freight

Current Amount 10.00

Tax and Rebates .00

Total Amount 10.00

OK | Cancel | Contact... | Approvals... | View UOP... | Accounts...

ATTACHMENTS

Notes (0)

Documents (0)

E-Mail (0)

6

7

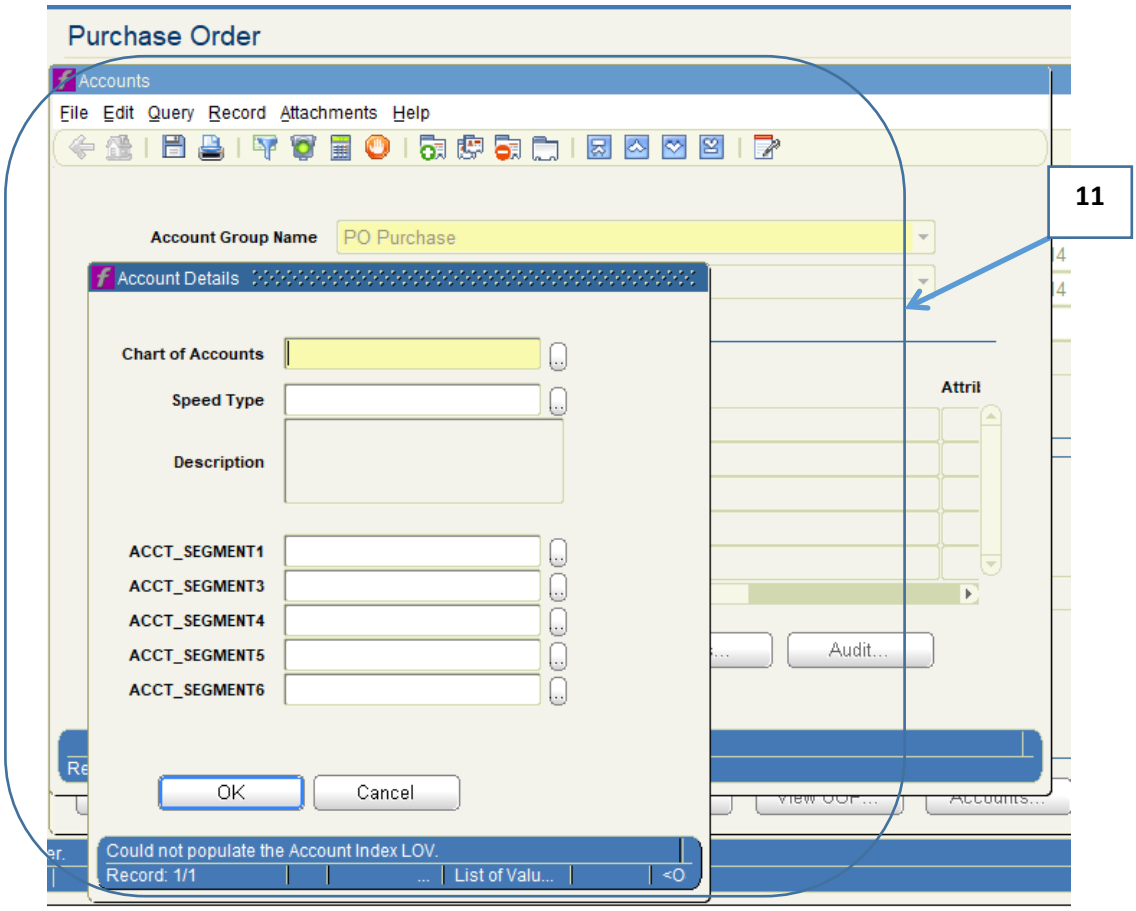
8

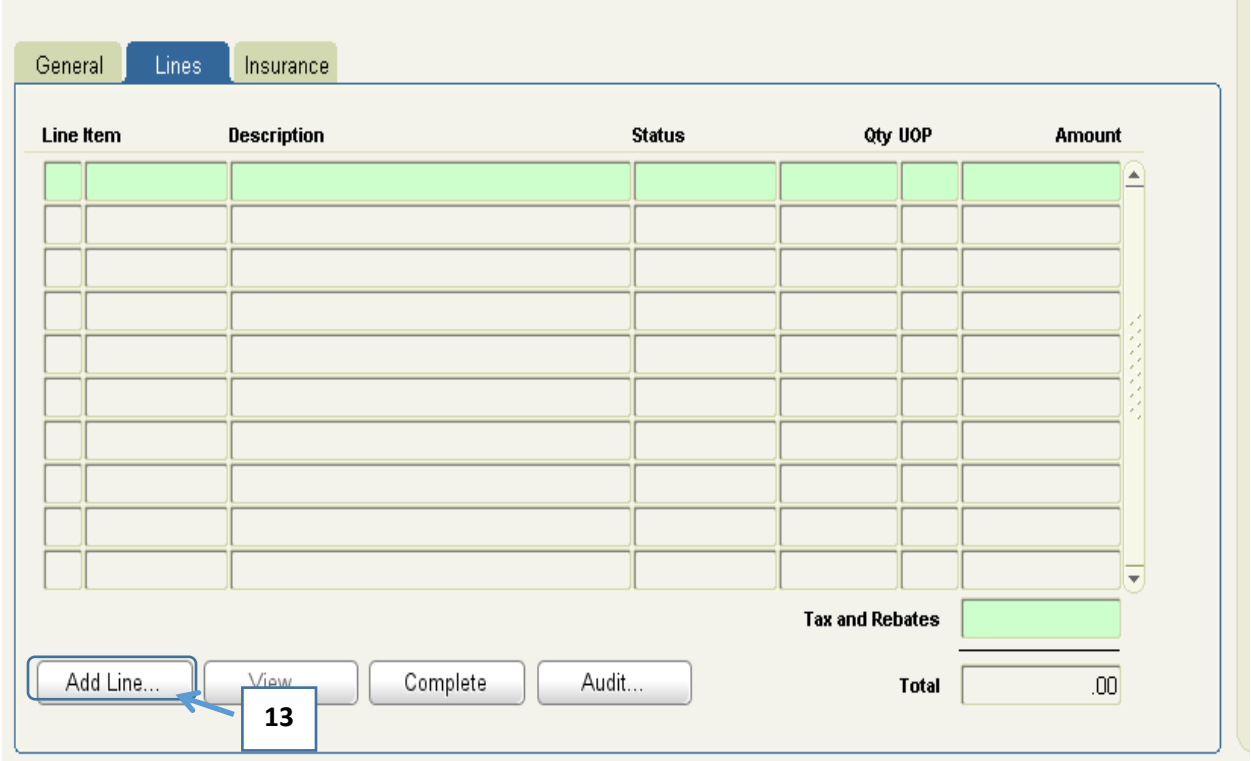
9

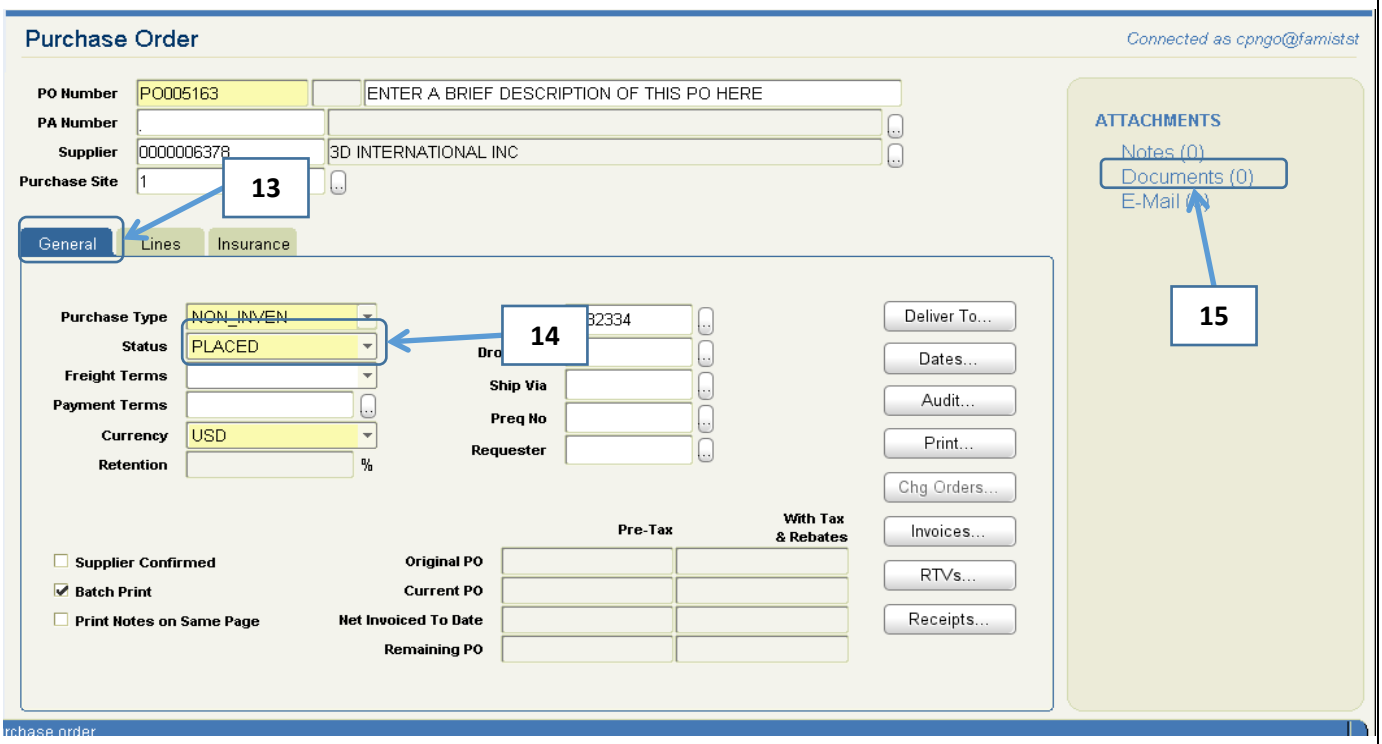
10

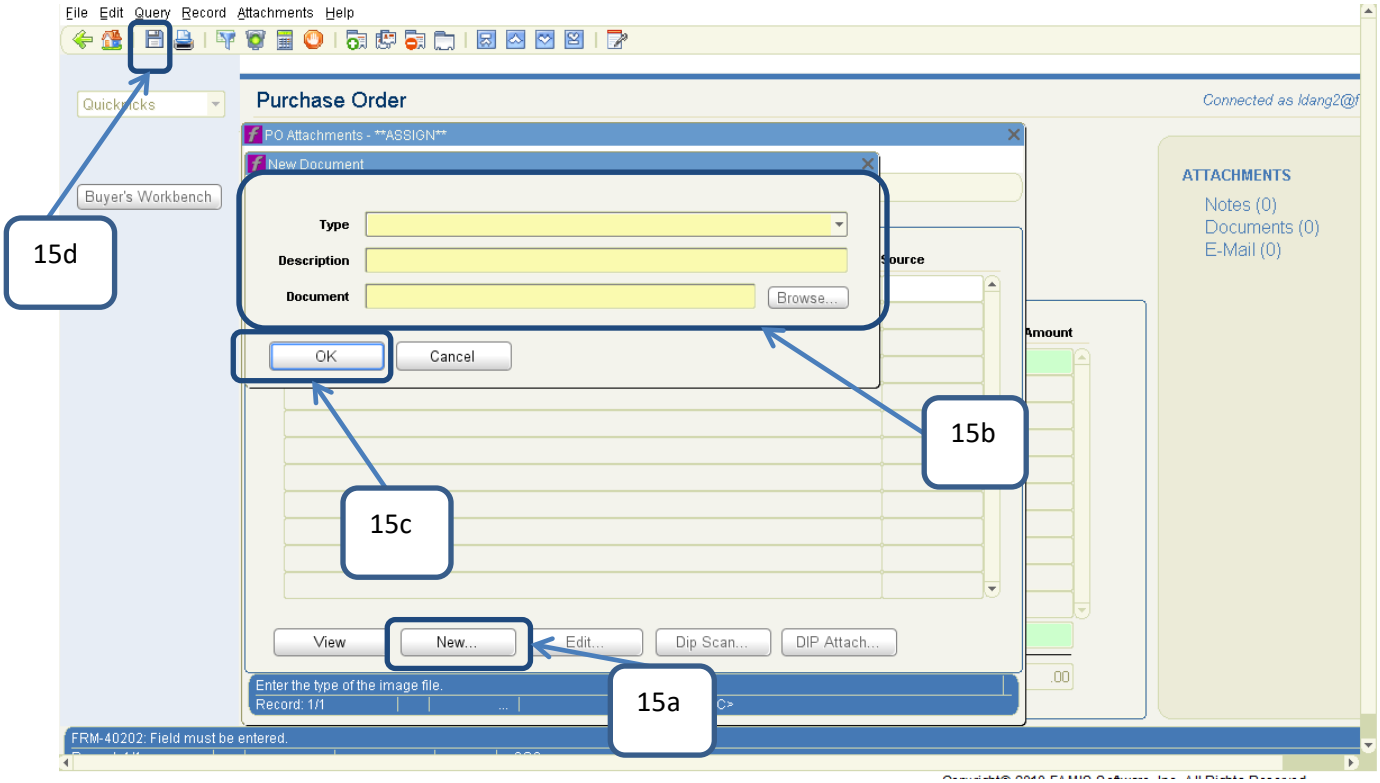
11

12


Purchase Order
Accounts
File Edit Query Record Attachments Help
11
Account Group Name
PO Purchase
Account Details
Chart of Accounts
Speed Type
Description
ACCT_SEGMENT1
ACCT_SEGMENT3
ACCT_SEGMENT4
ACCT_SEGMENT5
ACCT_SEGMENT6
OK
Cancel
Attril
Audit...
Could not populate the Account Index LOV.
Record: 1/1
List of Valu...

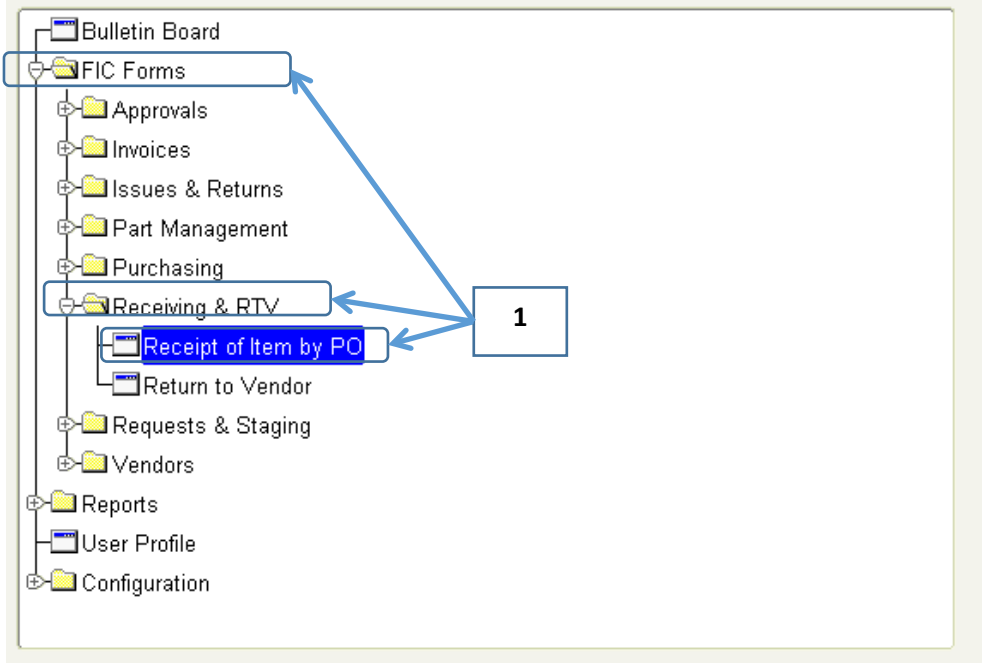

General
Lines
Insurance
Line Item
Description
Status
Qty UOP
Amount
Tax and Rebates
Total
.00
Add Line...
View
Complete
Audit...
13

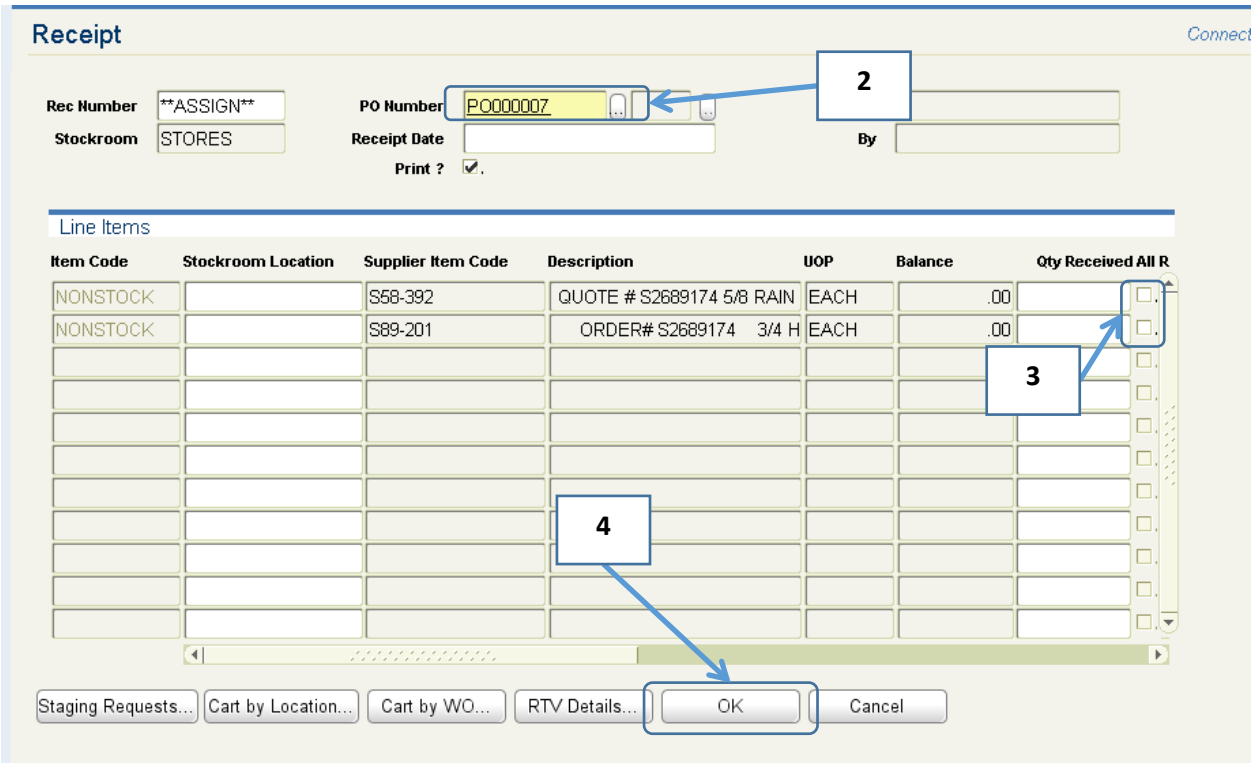

Purchase Order
Connected as cpngo@famistst
PO Number
PO005163
ENTER A BRIEF DESCRIPTION OF THIS PO HERE
PA Number
Supplier
0000006378
3D INTERNATIONAL INC
Purchase Site
1
13
General
Lines
Insurance
Purchase Type
NON_INVEN
Status
PLACED
14
Freight Terms
Payment Terms
Currency
USD
Retention
%
Ship Via
Preq No
Requester
Deliver To...
Dates...
Audit...
Print...
Chg Orders...
Invoices...
RTVs...
Receipts...
Pre-Tax
With Tax & Rebates
Supplier Confirmed
Batch Print
Print Notes on Same Page
Original PO
Current PO
Net Invoiced To Date
Remaining PO
ATTACHMENTS
Notes (0)
Documents (0)
E-Mail (0)
15

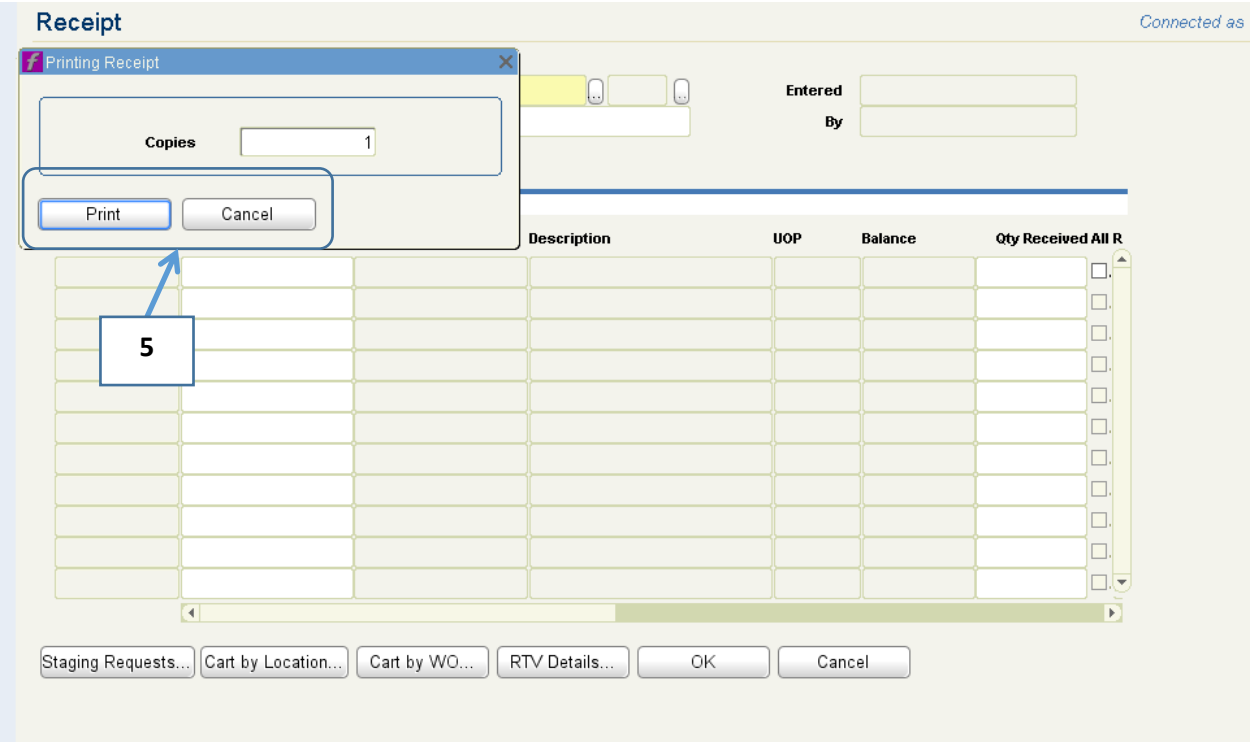

File Edit Query Record Attachments Help
Quick Links
Buyer's Workbench
Purchase Order
Connected as ldang2@f
PO Attachments - **ASSIGN**
New Document
Type
Description
Document
Browse...
OK
Cancel
Source
Amount
View
New...
Edit...
Dip Scan...
DIP Attach...
Enter the type of the image file.
Record: 1/1
FRM-40202: Field must be entered.
ATTACHMENTS
Notes (0)
Documents (0)
E-Mail (0)
15d
15b
15c
15a

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

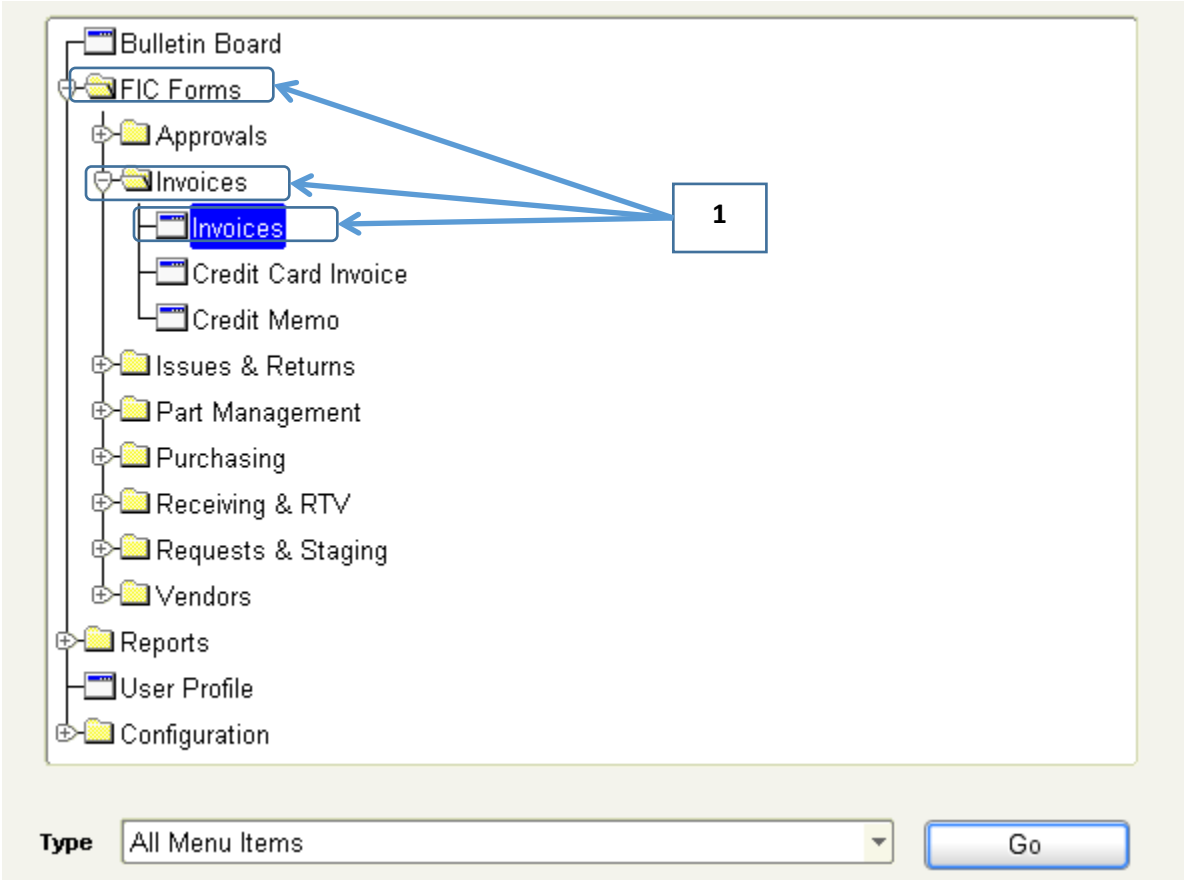





Receipt
Connected as
Printing Receipt
Copies
1
Print
Cancel
Entered
By
Description
UOP
Balance
Qty Received All R
5
Staging Requests...
Cart by Location...
Cart by WO...
RTV Details...
OK
Cancel

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**



File Edit Query Record Attachments Help

Quickpicks

5

Invoice

Connected as cprgo

General | Line Items | Sub-Vendors

6

PO Number: PO001528 — LED LAMPS FOR CAMPUS

Vendor: 0000000001 — (P-CARD ONLY) VENDORS NOT IN P

Invoice: 00020176

Inventory PO? ☑

Dates...

Dates

Invoice D: FEB 13, 2013

Receipt Date: WED FEB 20, 2013

Payment Due: WED FEB 20, 2013

2

General Information

Vendor Site: 1

Voucher No.: VOU001327

Terms:

Apprvd:

Status: MATCHED

3

Check Information

Check No.:

Check Amount:

Payment Date:

Dollar Amounts

Total Detail Line Amount	1,677.50
Freight	
Total Invoice Pre-tax Amount	1,677.50
Total Amount with Full Tax	1,677.50
Total Amount with Tax & Rebates	1,677.50

4

ATTACHMENTS

Notes (0)

Documents (0)

E-Mail (0)

INFORMATION

Purchase Order

Invoice

General | Line Items | Sub-Vendors

Line	Vendor Part Number	Part Number	UOP	Quantity	Unit Price	Pre-Tax Amount
1	221W2-15W, 15W PAR38, WW,3000	NONSTOCK	EACH	50.00	33.5500	1,677.50
2	221W2-12W, 12W PAR38,WW,3000	NONSTOCK	EACH			.00

Balance To Be Itemized: .00

7

Line Details

Description: DALE, FERDIE, 221W2-15W

Comments:

7

PO Quantities

Ordered	50.00
Received	50.00
Invoiced	50.00

Line Amounts

	Full	Net
Tax Amount	0	0
PO Unit Price	33.5500	
Invoice Unit Price	33.5500	
This Inv Qty X Diff	.00	

Status Information

Approved:

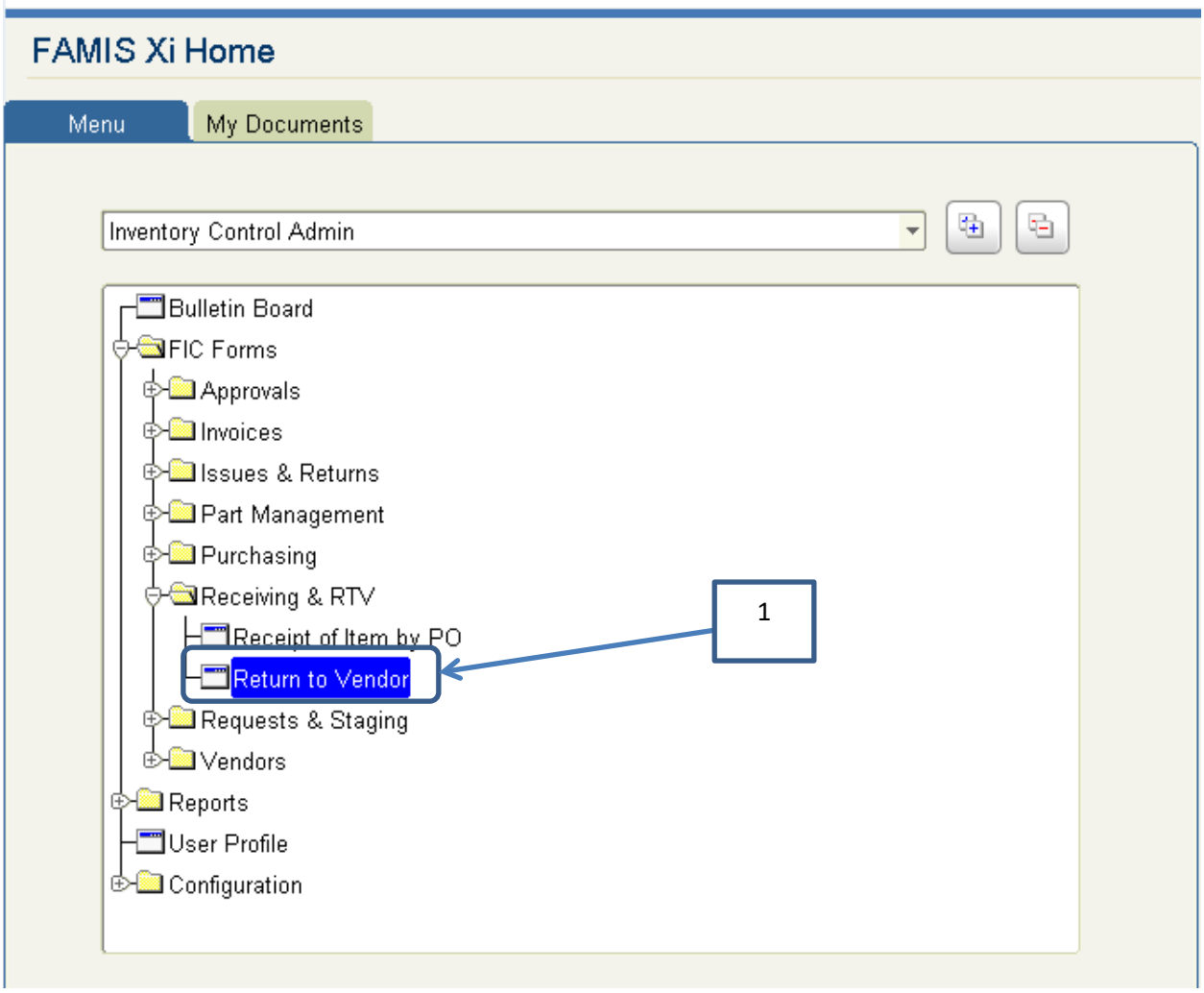
Status: MATCHED

Reason:

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.



Returns

PO Number PO006528 Vendor 0000009354 Invoice

Dates...

Comments...

General Information

Action Code

Buyer

RMA No.

Assigned To 0083736

Return Information

Return Date TUE JAN 20, 2015

Returned By 0090703

Return Reason

Restocking Chrg

Location WAREHOUSE

Shipping Information

Packing Slip No.

Packing Slip Date

Ship Via Code

Vendor Information

Vendor Site 1

Line Items

Warehouse	Part Number	Description	Line No	Staging	Bin	W
STORES	DIRECT	4 - SHIFFLER 24" X 30" MIRROR	1			

Line Items

Warehouse	Part Number		Unit Price	Avail for Return (UM)	Returning (UM)	Returning (UOP)	Returned (UM)
STORES	DIRECT	CH	140.5000	4			4

FAMIS

File Edit Query Record Attachments Help

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