



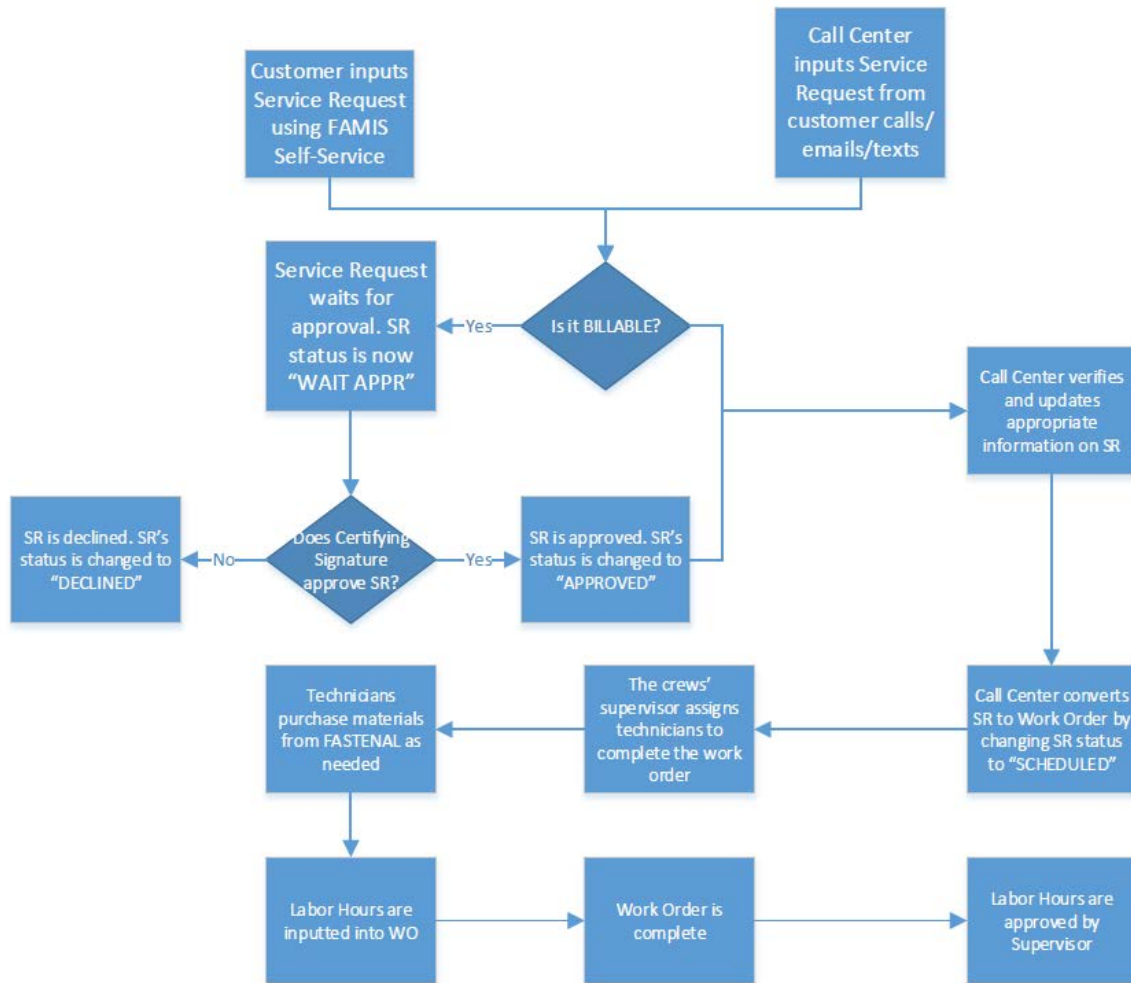
**FAMIS TRAINING  
for  
FIX-IT CALL CENTER**

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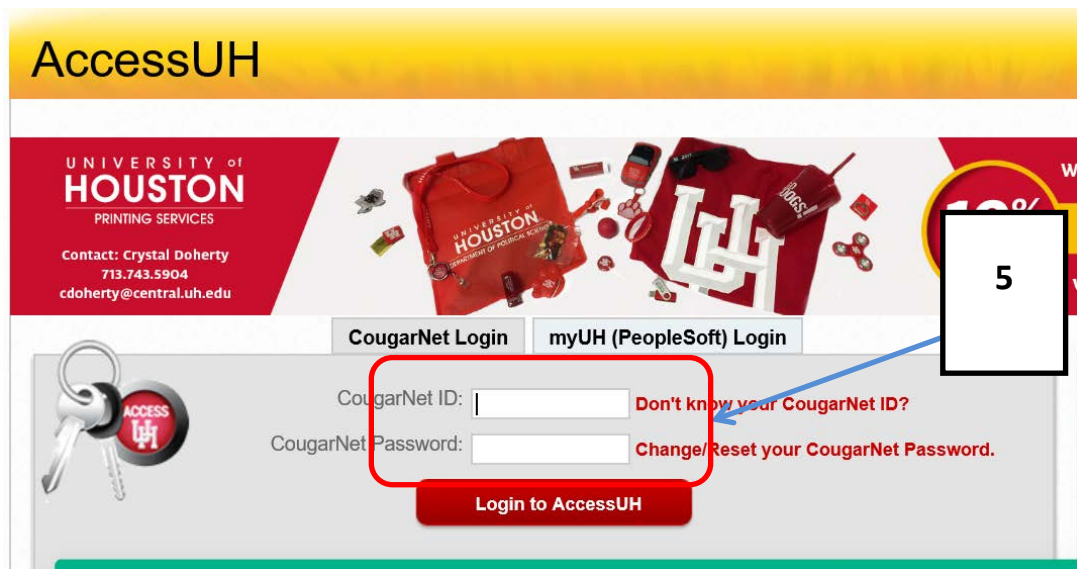
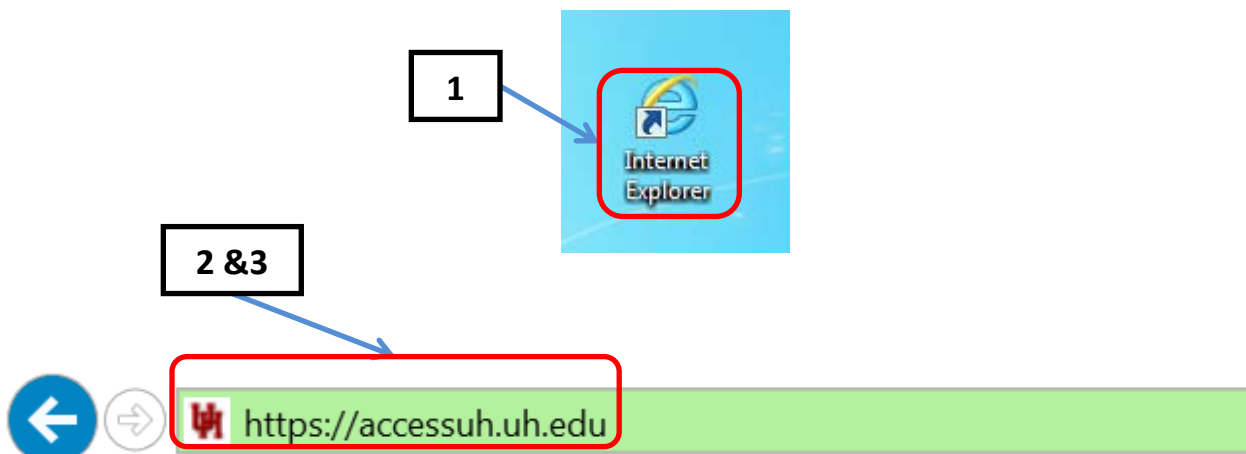
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# Overview of Service Request – Work Order Workflow in FAMIS



# 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



## University Services



Blackboard Learn 9



CASA



CoogsCare



CougarCard



Facility Request  
Self-Service



Facility Work Order  
System



Faculty/Course  
Evaluation



Get Involved

**famis**

an equestrian company

6

Home Maintenance Inventory TAB\_FSS

FAMIS

Quickpicks

FAMIS Xi Home

**FAMIS Xi Portal**

Welcome: FAMISSUP

# 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

**Service Request**

SR Number **2** W.R.R 305 TOILET TISSUE DISPENSOR NEDD REPLACING

Parent WO

Capital Project

Deficiency Project

Main Attributes Other Related Work Routing

**Requestor Information**

Requestor

Telephone

Alternate Req

Alt Telephone

Request Date TUE MAR 25, 2014 12:53PM

**Location**

**Priorities**

Find %

Priority	Description
1	Emergency
2	URGENT
3	ROUTINE
4	SCHEDULED

Find OK Cancel

**Asset Class**

**Equipment**

**General Information**

Type CORRECTIVE

Priority **3**

Status SCHEDULED

Non-Avail Time

Crew GEN\_MAINT

Assigned To 1201186

Print Work Order Ticket

**Priority of SR**

## Crew

List of available crews in FAMIS:

<u>Crew Name</u>	<u>Description</u>
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 CONTRL	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.

### Service Request Workbench

[Help](#)

**Search Criteria**

**Location:**

Site Id :

Building :

Floor :

Room :

**Start Date:**

From :

To :

**Service Request Information**

Request Number :

Requestor PSID :

Request Status :

Speed Type :

Maintenance Type:

Crew:

#### Contact Information

For technical assistance, please contact [famissup@central.uh.edu](mailto:famissup@central.uh.edu).

For information about a Work Order, please contact [csc@central.uh.edu](mailto:csc@central.uh.edu).

For billing questions, please contact [famhill@uh.edu](mailto:famhill@uh.edu).

\*Please note: this web application is optimized for Google Chrome browser.

Show  entries

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
SR43892	WAIT APPR	IGLEHART, PEYTON ALEXANDRIA	8006075	0493-Cougar Softball Stadium		H0502	03/28/18	ELECTRICAL		CORRECTIVE	CHARGE		TRANSFORMER BURNT OUT BEHIND SOFTBALL FIELD	alwade	SR - Verified	2	2	
SR432794	WAIT APPR	JOURNET, PAMELA J	0838678	0483-Health 2	3041	H0190	04/24/18	GEN_MAINT	GEN-A4	CORRECTIVE	CHARGE	00730-2064-H0190-00052-NA-100%	WASTE LABELS AND RECEPTACLES	alwade	SR - Verified	1	1	<a href="#">F1717609793/PQME-FNL Q0064-33377.pdf</a>
SR438008	WAIT APPR	HERNANDEZ, FRANCISCO	0840908	0542-South Park Annex		H0182	04/26/18	HVAC		SERVICES	CHARGE		BUILD FILTER BRACKET FOR RUO PACKAGE UNIT	mmathe2	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			
SR438385	WAIT APPR	OWENS, JACKQUELINE G	1069377	0550-Science and Research 1	531A	H0112	04/30/18	GEN_MAINT	GEN-A5	ALTERATION	CHARGE	00730-2064-H0112-03797-NA-100%	ESTIMATE ROOM PAINTING (AUX)	alwade	SR - Verified	2	2	

Search:

## 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	
Request Number :	SR123456
Requestor PSID :	1234567
Request Status :	Select... ▼
Speed Type :	12345
Maintenance Type:	Select... ▼
Crew:	Select... ▼

## 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

Search Criteria	
<b>Location:</b>	
Site Id :	Select... ▼
Building :	▼
Floor :	▼
Room :	▼
<b>Start Date:</b>	
From:	<input type="text"/>
To:	<input type="text"/>
<div>Submit Query   Clear   Create New</div>	

## 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.

Show  entries

SR Number ▲	Request Status ▼	Requestor ▲▼	Requestor ID ▼
-------------	------------------	--------------	----------------



## 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

Request/Work Order Status	Crew	Billing Type	Cost Center	Cost Summary	Description
REQUESTED	FIRE ALARM			\$0	ALARM ISSUE
REQUESTED	FIRE ALARM	NO CHARGE	00730-2064-H0613-G0610-NA	\$0	ALARM ISSUE
REQUESTED	FIRE ALARM	NO CHARGE	00730-2064-H0613-G0610-NA	\$0	ALARM ISSUE
REQUESTED	FIRE ALARM	NO CHARGE	00730-2064-H0613-G0610-NA	\$0	ALARM ISSUE
REQUESTED				\$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  entries

SR Number ▲	Request Status ▼
<a href="#">SR434892</a>	WAIT APPR
<a href="#">SR437794</a>	WAIT APPR
<a href="#">SR438008</a>	WAIT APPR
<a href="#">SR438201</a>	WAIT CUST
<a href="#">SR438386</a>	WAIT APPR
<a href="#">SR438420</a>	WAIT APPR
<a href="#">SR438532</a>	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 (%):	
<input type="text"/>	00730	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	100	Clear
<input type="text"/>	00730	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	100	Clear
<input type="text"/>	00730	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	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**

## 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.

Upload Files (JPG, JPEG, PNG, GIF, PDF)

Browse...

Upload

# Create a Service Request

## Create a new Service Request

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

The screenshot shows the 'SR Workbench' tab selected in the top navigation bar. The main interface is divided into two panels. The left panel, titled 'Search Criteria', contains fields for 'Location' (Site Id, Building, Floor, Room) and 'Start Date' (From, To). The right panel, titled 'Service Request Information', contains fields for 'Request Number', 'Requestor PSID', 'Request Status', 'Speed Type', 'Maintenance Type', and 'Crew'. At the bottom of the interface are three buttons: 'Submit Query', 'Clear', and 'Create New Request'. The 'Create New Request' button is circled in blue. To the right of the interface, there is a 'Contact Information' section with links for technical support, information, and billing queries, followed by a red note and a legend for 'Send Reminder' and 'Recoverable'.

**Search Criteria**

**Location:**

Site Id :

Building :

Floor :

Room :

**Start Date:**

From:

To:

**Service Request Information**

Request Number :

Requestor PSID :

Request Status :

Speed Type :

Maintenance Type:

Crew:

Submit Query Clear **Create New Request**

**Contact Information**

For technical support: [Click Here](#)

For information: [Click Here](#)

For billing queries: [Click Here](#)

**\*Please note: t**

☐ Send Reminder

☐ Recoverable

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

## Service Request Form

### Requestor

Enter PSID:

Requestor Name:  Phone:

Enter Alt. Requestor's PSID:

Alternate Requestor:  Alternate Phone:

#### 4. Enter Location Information and Work Order Description section.

##### Location

<b>Site: *Required</b> <input type="text" value="Select..."/>	<b>Floor:</b> <input type="text" value="Select an..."/>	<b>Dept:</b> <input type="text" value="Select an Op..."/>	<b>Method:</b> <input type="text"/>
<b>Bldg: *Required</b> <input type="text" value="Select an Option"/>	<b>Room:</b> <input type="text" value="Select an..."/>	<b>Zone:</b> <input type="text" value="Select an Op..."/>	

##### Work Description

<b>Work Title: *Required</b> <input type="text"/>	<b>Maintenance Type:</b> <input type="text" value="Select..."/> *Required
<b>Description of Work:</b> <input type="text"/>	<b>Priority:</b> <input type="text" value="Select..."/> *Required
	<b>Status:</b> <input type="text" value="Select..."/> *Required
	<b>Crew:</b> <input type="text" value="Select..."/> *Required
	<b>Craft:</b> <input type="text" value="Select..."/>
<b>Submittal Method:</b> <input type="text" value="Select..."/> *Required	<b>Earliest Start Date:</b> <input type="text" value="12-May-2018"/>
	<b>Latest Completion Date:</b> <input type="text" value="12-Jun-2018"/>
	<b>Dates/Times Work Cannot be Done in Location:</b> <input type="text"/>

##### Billing

#### 5. Enter Billing information.

##### Billing

<b>Billing Type: *Required</b> <input type="text" value="CHARGE"/>					
<b>Enter Speed Type:</b>		<b>Percentage (%):</b>			
<b>Business Unit:</b> <input type="text" value="00730"/>	<b>Fund Code:</b> <input type="text" value="###"/>	<b>Department ID:</b> <input type="text" value="H###"/>	<b>Program:</b> <input type="text" value="G###"/>	<b>Project ID:</b> <input type="text"/>	<b>Percentage (%):</b> <input type="text"/>
<b>Enter Speed Type 2:</b>		<b>Percentage (%):</b>			
<b>Business Unit:</b> <input type="text" value="00730"/>	<b>Fund Code:</b> <input type="text" value="###"/>	<b>Department ID:</b> <input type="text" value="H###"/>	<b>Program:</b> <input type="text" value="G###"/>	<b>Project ID:</b> <input type="text"/>	<b>Percentage (%):</b> <input type="text"/>
<b>Enter Speed Type 3:</b>		<b>Percentage (%):</b>			
<b>Business Unit:</b> <input type="text" value="00730"/>	<b>Fund Code:</b> <input type="text" value="###"/>	<b>Department ID:</b> <input type="text" value="H###"/>	<b>Program:</b> <input type="text" value="G###"/>	<b>Project ID:</b> <input type="text"/>	<b>Percentage (%):</b> <input type="text"/>
<input type="button" value="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
ry WO Error Report	WO Workbench