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1.0 Introduction

FAMIS is a suite of software systems designed by FAMIS Software, Inc. to help you better manage your equipment and facilities. FAMIS utilizes the latest technologies to create a highly flexible, modifiable, accessible, and portable asset management software product that gives you complete control over your organization, your data, and the software itself.

The Maintenance Management module within FAMIS is a management tool for tracking maintenance activities. It provides a comprehensive and powerful system for managing corrective maintenance, preventive maintenance, alterations, renovations, and other service related work.

Please Ask Plenty of Questions!

When FAMIS Software designs training classes, we intentionally allow for plenty of time for you to ask questions. We feel teaching is like building blocks; each new topic is generally based on a previous topic. This training class will provide you with a working knowledge of specific portions of the FAMIS Maintenance Management module. If there are topics that you don’t understand, please ask the instructor for assistance. It’s important that you fully comprehend the topics that are covered before proceeding to the next topic.

Please Join the Class!

You are a very important element in the quality of training that you will receive today. As a member of this class, please participate by listening to the instructor’s presentation and then performing the Exercises as directed. Please do not explore on your own or skip Exercises.
INVOKING FAMIS

The FAMIS application is ‘invoked’ (started) by selecting the FAMIS Icon. During training we will be using sample data rather than the production data you will use once you “go live” (implement FAMIS). Your FAMIS Administrator will provide you with a username and password for accessing FAMIS for training as well as from your own work location. Once FAMIS has been invoked, a User Logon Form will be displayed (refer to figure below). This form represents the first level of security for protecting your FAMIS data. FAMIS cannot be accessed without a valid username and password. Please protect your logon information and always logon as yourself.

Username: _______________________  _________________________
Password: _______________________  _________________________
Database: _______________________  _________________________

Accessing FAMIS

To access FAMIS, type your username in the area labeled Username. Use the TAB key or navigate with your mouse to the field labeled Password. Type in your password and navigate to the field labeled Database by again using the TAB key or your mouse. Once you have entered information in all three fields, you can proceed by either pressing the ENTER key or selecting the CONNECT Button with your mouse.

NOTE: If you press the ENTER key to navigate to the next field, FAMIS interprets the keystrokes as an attempt to logon and you will get an error message if you have not entered a valid password or database.

FAMIS Logon Form – Figure 1.
Congratulations!

If you have accessed the FAMIS Navigator (shown below), you have successfully logged onto FAMIS.

FAMIS Navigator – Figure 2.
GENERAL FAMIS CONCEPTS

Functions:

A *function* is the means to execute a command or action. There are three choices for almost every function on FAMIS available through the use of the…

- TOOL BAR
- PULL DOWN MENU
- FUNCTION KEYS

The Tool Bar is located at the top of the screen represented by Icons. The Pull Down Menu can be accessed using either the mouse or the ALT key with the underlined letter. The function keys are located directly on the keyboard (F1 - F12). [The HELP Pull Down menu will display the function keys available.]

Miscellaneous Functions:

<table>
<thead>
<tr>
<th>Function</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>List of Values (LOV)</td>
<td>EDIT&gt;LIST VALUES F9 Down Arrow Box Next to Field (where available)</td>
</tr>
<tr>
<td>Save or Commit (Diskette)</td>
<td>FILE&gt;SAVE/COMMIT F10</td>
</tr>
<tr>
<td>Print Screen (Printer)</td>
<td>FILE&gt;SCREEN/PRINT Shift&gt;F8</td>
</tr>
<tr>
<td>Attachments (Attachments)</td>
<td>ATTACHMENTS&gt;ATTACHMENTS</td>
</tr>
<tr>
<td>Return to Navigator</td>
<td>FILE&gt;NAVIGATOR</td>
</tr>
<tr>
<td>Displays Error</td>
<td>Shift&gt;F1 HELP&gt;DISPLAY ORACLE ERROR</td>
</tr>
</tbody>
</table>

QUERY Functions:

<table>
<thead>
<tr>
<th>Function</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enter Query Mode (Magnifying Glass with Yellow Question Mark)</td>
<td>QUERY&gt;ENTER QUERY F7</td>
</tr>
<tr>
<td>Repeat Query (Magnifying Glass with Yellow Question Mark, twice)</td>
<td>QUERY&gt;LAST CRITERIA F7&gt;F7</td>
</tr>
</tbody>
</table>
Count Hits  
(Magnifying Glass with Summation Sign)
QUERY>COUNT HITS
Shift>F2

Execute Query  
(Green Traffic Light)
QUERY>EXECUTE QUERY
F8

Cancel Query  
(Red Traffic Light)
QUERY>CANCEL
Ctrl + Q

Query Wildcard  
%  (for multiple missing characters)
Query Wildcard  
_  (for a single missing character)
Complex Query  :
:S  (entered in any field while in Query mode - Execute Query
accesses a Query dialog box)

Record Level EDITING Functions:

Insert Record  
(Page with Plus Sign)
RECORD>INSERT
F6

Duplicate Record  
(Two Pages)
RECORD>Duplicate
F4

Delete Record  
(Page with Red X)
RECORD>DELETE
Shift>F6

Clear Record  
(Page with Eraser)
RECORD>CLEAR
Shift>F4

Clear Block  
EDIT>CLEAR BLOCK
Shift>F5  
(This is used to clear all records entered or queried. The records are not deleted.)

Field Level (Form) NAVIGATION Functions:

Advance 1 Field  
TAB
Mouse navigation

Back 1 Field  
SHIFT>TAB
Mouse Navigation

Ctrl + Tab  
Control + Tab will allow moving the cursor out of a ‘LONG’
data Field (e.g. Task List )
NOTE: When editing a text field, such as the Work Order Task List, the TAB key acts as an editing key within the text field, not a form navigation function. Use MOUSE navigation to exit a text field rather than the TAB key.

Record Level NAVIGATION Functions:

First Record (Left Arrow with Left Barrier)
RECORD>FIRST

Previous Record (Left Arrow)
RECORD>PREVIOUS
Up Arrow (keypad)

Next Record (Right Arrow)
RECORD>NEXT
Down Arrow (keypad)

Last Record (Right Arrow with Right Barrier)
RECORD>LAST

Field Level Editing - CUT/COPY/PASTE Functions:

Cut (Scissors)
EDIT>CUT

Copy (Two Pages)
EDIT>COPY

Paste (Clipboard with Page)
EDIT>PASTE

Edit Field
EDIT>EDIT FIELD
Ctrl + E
(Used to access a field level editor that is useful for large text fields.)

Read the message line at the bottom of the screen to assist you in your data entry!
It will assist you by providing the first level of HELP for each field, indicate when you are in QUERY MODE, and display error messages.
Mouse Menu Functions:

Mouse Menus have been added to key fields that enable a user to quickly launch a related form or feature. An example is shown below:

Right Mouse Click on Work Order Number launches the following forms & features:

- Work Order Form
- Work Order Cost Summary
- Work Order Cost Summary Form
- Print the Work Order (ticket)

Pop-up Calendar functions:

Pop-Up calendars have been added to all date fields that allow the user to enter a date.

Right Mouse Click on date Field:

- List Values
- << First Month (January)
- < Previous Month
- > Next Month
- >> Last Month (December)

Date Shortcuts:

- 15 will result in the 15th of the current month and current year
- TOD will result in the current date (the current month, day, and year)
- TOM will result in the date for tomorrow
- EW will result in the date of the last day of the week based on the site’s date configuration
- BW will result in the date of the first day of the week based on the site’s date configuration
- EM will result in the date of the last day of the month based on the site’s date configuration
- BM will result in the date of the first day of the month based on the site’s date configuration
- 15 JAN will result in January 15 of the current year
- 15 JAN 99 will result in January 15, 1999
- 1-15 will result in January 15 of the current year
EXERCISE 1 – FORM ACCESS

In Exercise 1 you will learn how to access forms, select open forms from the Window option, and access several levels of Help in FAMIS by using the Drop-Down Menu Bar.

Step 1: General Form Access

- Start the Service Request Form by using the FAMIS Navigator.
- Navigate through the menu selections by using your mouse or the keypad arrow keys.
- When you access the Service Request Form you are in data entry mode. You are ready to enter a new Service Request record. You must change to Query mode to Query (search for) existing Service Request records. All items on the Tool Bar appear in BOLD except for the Attachments. (Ask the instructor why.)
- This form has Buttons on the right margin to access other forms related to the Service Request Form.
- This form displays one record at a time when multiple records are queried.
- Minimize the Service Request Form.

Note: Minimizing the form leaves it open and available for use. FAMIS Software recommends that you close the forms when they are no longer needed, as you go. You close the form by using the OK Button or Cancel Button when available or by using the Window close function by clicking the “X” in the top right-hand corner of the window. Please leave the forms open and minimized for this exercise.

Step 2: Work Order Form Access

- Start the Work Order Form by using the FAMIS Navigator;
- When you access the Work Order Form you are in data entry mode. You must change to Query mode to Query (search for) existing Work Order records.
- Minimize the Work Order Form.

Step 3 will show you how to access the open and available forms using the Window option on the menu bar.

Step 3: Current Schedule Form Access

- Start the Current Schedule Form by using the FAMIS Navigator;
- Double-click on any Work Order to open the Work Order Form for that Work Order.
- Minimize the Work Order Form.

Step 4 will show you how to access the open and available forms using the Window option on the menu bar.
**Step 4: Window Status**

- Access the *Window* option on the Menu Bar;
- The name of each form (window) you currently have open will be displayed. A form is considered open even if it has been minimized.
- The current form will have a check mark next to the name.
- The FAMIS Navigator window should always be one of the names displayed, since it is always in the background.
- You can navigate to any open Window by selecting it from the names displayed.
- The normal Window’s Application functions of Cascade, Tile, and Arrange Icons are also available.

**Step 5: Help Access**

- Start the *Help* Option by using the Menu Bar;
- When you access the *FAMIS Help* option, you may select from these various levels of Help:
  - **⇒Keyboard** Keyboard level help provides a display of the function keys that can be used in FAMIS. You may access this level of Help from anywhere in FAMIS. We recommend using the function keys portion of this document for referencing.
  - **⇒Form** Form level help provides information about the specific FAMIS form you are currently accessing. The information provided includes a description of the form’s general purpose and each of the data fields on that form.
  - **⇒Online** The Online Help Manual option invokes a browser window containing help for various forms and functional areas of FAMIS. Covered topics appear in the left portion of the browser window in an “explorer” type format. Drill down to the topic of interest and, when selected, it will appear in the right portion of the window.
⇒Field
Field level help provides technical data about the specific FAMIS field the cursor is currently on. This may help to identify the field name (at the top) or size (maximum data length) as it is used on the FAMIS database. It will also specify if the field is required.

⇒Display Oracle Error
Selecting this option will provide additional information if the user has received an error message (generally displayed at the bottom of the screen). This information can provide useful technical information when trouble-shooting a software issue.

⇒About Form
This is technical data about the form name and version currently accessed. This may be helpful to the technical support personnel of FAMIS when trouble-shooting a software issue.

Read the message line at the bottom of the screen to assist you in your data entry!
It will assist you by providing the first level of HELP for each field, indicate when you are in QUERY MODE, and display error messages.
EXERCISE 2 – USE LIST OF VALUES (DEMONSTRATION)

In this Exercise you will learn about the various types of Lists of Values available in FAMIS.

Use FIND Type List of Values

The FIND type List of Values is used to query a short list of items. This includes lists such as Maintenance Type Codes, Priority Codes, Status Codes, etc. A FIND type List of Values for Maintenance Type Codes is shown below:

FAMIS FIND Type List of Values - Figure 3.
**Query Type List of Values**

The *QUERY* type *List of Values* is used to query a long list of items. This includes lists such as Work Orders, Standing Work Orders, Employees, etc. The FAMIS user is expected to use the *Enter Query* and *Execute Query* commands to retrieve the data. This *QUERY* type *List of Values* also differs from the FIND type in that additional selection criteria are provided. A *QUERY* type *List of Values* for the Work Orders is shown in Figure 4.

**FAMIS QUERY Type List of Values – Figure 4.**

- There is a Scroll bar across the bottom that is used to access additional fields for use in the Query.
- To use the Query type *List of Values*, a Query must be performed.
- Use the ![Enter Query] (Enter Query) Icon to enter Query mode.
- Navigate to the *Description* Field and enter `%WINDOW%`.
- Execute the Query by using the ![Execute Query] (Execute Query) Icon.
- FAMIS performed a Query (FIND) which resulted in all Work Orders with the letters *WINDOW* anywhere in the Work Order Description.
**SEARCH Type List of Values**

The *SEARCH* type *List of Values* is used to search (Query or Find) a record based on specific search criteria. This type of *List of Values* is used for Parts and Equipment.

**FAMIS SEARCH Type List of Values - Figure 5.**

- There is a Scroll bar across the bottom that is used to view additional fields of information related to each Equipment record.

- The *Equipment Search* Form has Tabs across the top to access different form panels that can be used to perform specialized Equipment Searches (Queries).
EXERCISE 3 – CHANGE YOUR PASSWORD

In this exercise you will learn how to change your FAMIS password.

Step 1: Access the User Database Profile Form

- Start the User Database Profile Form using the FAMIS Navigator.
- Select the Password Tab.

Step 2: Change Your FAMIS Password

- Enter your Old Password in the Old Field.
- Navigate to the New Field and enter your new password.
  
  NOTE: Use only alpha/numeric characters. You may not use any special characters (e.g. ~,!,@,#,$,%,etc.) or space bars. Also, DO NOT use a numeric character as the first character of your new password. Preferably, your new password should use both, alpha and numeric characters and should be at least six (6) characters in length.

- Navigate to the Confirm Field and re-enter your New Password.
- Press the OK Button when complete.
- A confirmation message should now be displayed, indicating that you have successfully changed your password. If not, please ask your instructor for assistance.
- Press the OK Button to close the message window.
EXERCISE 4 – ADD A QUICKPICK BUTTON

In Exercise 4 you will learn how to create Quick Pick Buttons that will give easy access to the Forms, Reports or Web-Sites that you use most frequently.

Step 1: Add a QuickPick Button

The QuickPick Button feature provides the user with the ability to customize your own form access.

- Access the *Add QuickPick Button* by placing your mouse over the gray area of the FAMIS Navigator and pressing the right-click mouse button.
- The *Add QuickPick Button* should now be displayed. *If not, ask your instructor for assistance, if needed.*

![FAMIS Add QuickPick Button – Figure 7.](image)

- Using your left-click mouse button, press the *Add QuickPick Button*.
- The *Add QuickPick Button* Form should now be displayed, as shown below. *If not, ask your instructor for assistance.*
FAMIS Add QuickPick Button Form—Figure 8.

- Select the Form option and press the Next Button.
- The Application Selection Window of the Add QuickPick Button Form should now be displayed, as shown below. *If not, ask your instructor for assistance.*

FAMIS Add QuickPick Button Form—Figure 9.

- Using the Drop-Down List of Values for the Application Field, select the Service Request Form.
- Enter a Button Label and press the Finish Button.
- Your FAMIS Navigator should now display a new QuickPick Button for the Service Request Form. *(If not, ask your instructor for assistance.)*

**TIP:** You can highlight (single mouse-click) a menu item in the Navigator and then right mouse-click to pre-populate the form name.
2.0 Work Orders

**EXERCISE 5 – FIND EXISTING WORK ORDERS**

In this exercise you will learn how to find an existing Work Order, how to navigate within the Work Order form and how to update the information on a Work Order.

**Step 1: Access the Work Order Form**

- Access the Work Order Form using the FAMIS Navigator.

![FAMIS Work Order Form – Figure 10.](image)

- Using the techniques you have learned, query a Work Order that was assigned to you during the previous exercises.

**NOTE:**  Did you remember to change from Data Entry Mode to Query Mode? Did you notice that the appearance of the Work Order Form changed when you entered Query Mode?
Step 2: Review the Work Order Details

- **Main Tab**
  - Brief Description – Brief description of work to be performed.
  - General Information – Maintenance type, Method (how the request was received), whom the work is assigned to, etc.
  - Primary Labor – Primary Shop, Craft and estimated labor requirements to complete the work activity.
  - Current Status – Status, Material Status, Start Date and Due Date.
  - Location – Site, Building, Floor and Room where work is to be performed.
  - Tracking 1 and 2 – Additional fields provided that can be used for reporting and other purposes specific to a site.

- **Print – Print Work order Ticket options**
  - Pressing the Print button opens the *Work Order Print* Form as shown in the figure below:

  ![](image)

  **FAMIS Work Order Print Form – Figure 11.**

  - FAMIS provides the ability to print one Work Order or to batch print multiple Work Orders by selecting one of the following options:
    - **WO Number** – will print the Work Order Number displayed or the user can change the number or select another WO using the List of Values button to the right of the field.
    - **All Marked to Print for Crew** – Print all WO’s marked to print for all crews or for a selected crew
    - **All Marked to Print for Craft** – Print all WO’s marked to print for all Crafts or for a selected Craft
- All Marked to Print for Assigned To – Print all WO’s marked to Print or only those marked to print for a selected Employee (from the Assigned To field)
  - Complete Route – used to indicate FAMIS should print all information for a PM Route Work Order
  - Include Secondary Labor – used to indicate that FAMIS should print all information for all Secondary Crews indicated on a Work Order
  - By default, Work Orders will print to the user’s screen as an Adobe Acrobat file; however, the user may select a printer that has been defined in FAMIS as a print server.

- **Request** Button - Displays information concerning the Requestor, the type of Request and the Service Request or Project Request number associated with the Work Order

- **Related Work Orders** Button – Displays information about other Work Orders that are associated with the selected Work Order, either as a Parent or Child of the selected Work Order

- **Create Work Order** Button – Used to create a Child Work Order (covered in a later training exercise).

- **Billing** – Used to view or change the Work Order billing information.

- **Dates** – Historical dates relating to the selected work order.

- **Tasks** Tab - Detailed task list of work to be performed by the primary crew.

- **Crews** Tab - Secondary/supporting labor requirements, including estimated labor hours and separate tasks list of work to be performed by additional crews.

- **Tools** Tab - Tools planning list (not validated) related to the work order to expedite Maintenance Technician’s tool related planning activities.

- **PO’s** Tab - Used for planning purchases that will be required for the Work Order.
  - Press the **Orders** Button to review a list of Purchase Requisitions and/or Purchase Orders associated with the Work Order.

- **Routing** Tab - Routing history of status or assignment changes to the selected work order.

- **Readings** Tab - Historical record of any readings that were documented (for equipment records) during Work Order Closing.

- **Closing** Tab - Historical record of closing documentation.
Step 3: Add a Note to the Work Order

- Press the Attachments Button on the Toolbar or select Attachments > Attachments from the Menu Bar. The Attachments Form will open with the Options Tab selected, as shown in the figure below:

  ![FAMIS Attachments Form – Figure 12.](image)

  The Options Tab allows the user to select which notes will appear on the Notes Tab for the Work Order:
  
  - **Equipment** - Notes, Documents and E-Mail for the Equipment record associated with the Work Order.
  
  - **Location** - Notes, Documents and E-Mail for the Work Order Site, Building, Floor and Room.

- Navigate to the Notes Tab, as shown in the figure below:

  ![FAMIS Notes Tab Form – Figure 13.](image)
• Press the *New* Button to add a new Note to the Work Order. The *New Note* Form will open as shown in the figure below:

![FAMIS New Note Form – Figure 14.](image)

- Enter a *Title* for the note.
- Tab to the *Text* Field and enter the Note Text.
- Print on Work Order Ticket – Check the *Print on Work Order Ticket* box if you want the note to print on the WO Ticket when this Work Order is printed.
- Private Note – Checking the *Private Note* box will allow the note to be viewed only by the user that added the note.
- Note Date – FAMIS will automatically fill in the Current Date that the note is created. Do not attempt to enter a date in this field.
- Note User – FAMIS will automatically fill in the Employee ID of the person who created the note. Do not attempt to enter an Employee ID in this field.
- Close the *New Note* Form by pressing the OK Button.

• Press the Close the *Attachments* Form using the X in the top right corner of the form.

**NOTE:** FAMIS will display an Attachments icon on the Work Order form, as shown in the figure below when an attachment (Note, Document or E-Mail) has been added to a Work Order. The Attachments Form can be accessed by pressing this icon.
Step 4: Print a Work Order Ticket

- Press the Print Button.

  *NOTE:* The Print Work Order Ticket Window should be displayed. If not ask your instructor for assistance.

- You may choose to print the specific work order you selected or you may choose to print all work orders marked to be printed for a particular Crew. For this Exercise, select the specific Work Order Number.

  *NOTE:* Selecting print options to print ALL Work Orders marked to print for ALL Crews or ALL Crafts or ALL Assigned To will cause all Work Orders that have not previously been printed to print to your default printer. Exercise caution in using these options.

- Leave the Secondary Labor checkbox marked. This will cause any Secondary/Supporting Labor listed on the work order to print as well.

- Press the OK Button.

- The Print Server Dialog Window should be displayed. If not, ask your instructor for assistance.

- Close the Work Order Form.
EXERCISE 6 – USE THE CURRENT SCHEDULE

In this Exercise you will learn how to access and utilize the Current Schedule, view a backlog of open work orders, view labor and material for a work order, and review work order reports.

**Step 1: Access the Current Schedule Form**

- Access the Current Schedule using the FAMIS Navigator.

![FAMIS Current Schedule Form – Figure 16.](image)

**Step 2: Using Public and Private Views for the Current Schedule**

- Workbench views allow you to customize the Current Schedule to display columns in the order you prefer as well as determine which Work Orders will be displayed. Some views will be public, created by the FAMIS Administrator and available to all users. Some views will be private.

- When the Current Schedule opens, a list of All Active Work Orders is displayed. This is a public view created for you by the FAMIS Administrator.

- Press the Drop Down arrow to the right of the View Field at the top of the Current Schedule to view a list of other public views that have been created for you.

- Use the mouse to select a different view.

   Did you notice that the displayed list of Work Orders changed?
You can create private views on the Current Schedule Form that are accessible only to your user login to display only those Work Orders you wish to see and to display them in the sort and column order you prefer.

For this Exercise, create a view for Active Work Orders assigned to you.

Press the Edit Button.

The Edit Folder Window should now be displayed as shown below:

FAMIS Edit Folder Form – Figure 17.

Press the Duplicate Button to create a new Private View.

Enter the New Folder Name for your Private View (Include your name in the New Folder Name for this Exercise).

Press the OK Button.

Private – Checked if the View is considered a Private View.

Save Changes – Checked when created/editing a Private View.

Delete – Available only for Private Views.

Display Options:

- Primary Sort – You may select first/primary column to be used for sorting the Work Order results.
- Secondary Sort – You may select the second column to be used for sorting the Work Order results.
- Sort Order – Ascending or Descending
Display Column Order – The order of the columns (left to right) are displayed on the Display Column Order area as (top to bottom). You may move the order (left to right) of individual columns by highlighting a column and pressing the Move Field Up or Move Field Down Buttons.

- Filter Tab:

FAMIS Edit Folder Filter Tab Form – Figure 18.

- Crew – You may select all Crews or a specific Crew.
- Craft – You may select all Crafts or a specific Craft.
- Labor – You may select Primary and Secondary Labor or Both.
- Maintenance Type – You may select all Maintenance Types or a specific Maintenance Type.
- Request Type – You may select all Request Types or a specific Request Type.
- Maximum Priority – You select the Maximum Priority number (Highest Integer) to returned in the Work Order results or select All.
- Status – You may select All Active Statuses or a specific Status.
- Assigned To – You may select Work Orders that are assigned to All Employees or that are assigned to a specific Employee.

For this Exercise, select your name from the list of names displayed using the drop-down button to the right of the field.

- Building – You may select All Buildings or a specific Building.
Advanced Filter – You may use SQL logic to specify results that are not available from the above Filter Options. The following example would display all Work Orders that are at least 20 days past their due date:

\[ \text{TRUNC(DUE\_DATE)} \leq \text{TRUNC(SYSDATE)} - 20 \]

- **Options Tab:**
  - Press the Default Folder Drop Down Arrow to select your default folder.
    - *NOTE:* The folder that you select will be the view that automatically appears when you first open the Current Schedule Workbench.
  - Press the OK Button to exit the Edit Folder Window.
  - Close the Current Schedule Workbench by pressing the Close Form Button.
    - *TIP:* You can create private views for most FAMIS Workbenches using these same techniques.

**Step 3: Viewing/Editing a Work Order**

- Highlight the Work Order of your choice and press the **View** Button.
  - *TIP:* You can also double-click the actual WO Number.
- The **Work Order** Form should now be displayed.
- Use the techniques you have previously learned to view the Work Order Details. *Ask your instructor for help, if needed.*
- Update the **STATUS** on your work order.
- Close the **Work Order** Form.

**Step 4: Assigning a Work Order**

- Highlight the Work Order of your choice.
- Press the **Assign WO** Button.
- Check the appropriate box if you wish to change the status of the Work Order to **ASSIGNED**.
- Press **OK** button to assign the Work Order.

**Step 5: Closing a Work Order**

- Use the mouse to navigate to the **Work Order Number** Field for the Work Order you wish to close.
- Press the right-mouse button. FAMIS will display the **Work Order Mouse Menu**, as shown in the figure below:
FAMIS Work Order Mouse Menu Form – Figure 19.

- Select *Close* from the menu.
- The *Work Order Closing* Form should be displayed, as shown below:
FAMIS Work Order Closing Form – Figure 20.

NOTE: The Work Order Closing Form can also be accessed using the right mouse menu function from any form that displays the Work Order Number.

- Equipment – If the Work Order ticket has an Equipment Number noted on it, enter the Equipment Number in the Equipment Field. Notes related to the work performed on the Equipment must be entered using the Tasks Tab.

- Work Order Status - Change the Work Order Status to CLOSED.

- Tab to the Arrived Field and enter the date and time the work was started.

- Tab to the Completed Field and enter the date and time the work was completed.

NOTE: There are several short cuts for entering date values (e.g. EW = end of current week, BW = beginning of current week, TOD = current date, 15 = 15th day of the current month and year, etc.). Also, you may use your List of Values to display a Calendar View.

- Cause – Enter the Work Order Cause, if appropriate, such as Vandalism, Snow Storm, etc.

- Labor Charges – Labor charges will be entered on daily timesheets and entered using the FAMIS Labor Charges Form (not from the Work Order Closing Form).

NOTE: Labor records previously entered for the Work Order can be viewed using the Labor Tab of the Work Order Closing Form.

- Material Charges – Benchstock material charges will be noted on the WO Ticket and entered through the Work Order Closing process.
Use the mouse to navigate to the Material Tab. The *Work Order Material Charges* form will be displayed, as shown below:

**FAMIS Work Order Material Charges Form – Figure 21.**

- Enter the appropriate Part Number as dictated by your campus.
- Override the description with the actual description of the materials.
- Enter a quantity.
- Update the Unit of Measure, or tab to accept EA.
- Tab to accept your Warehouse.
- Tab to accept the current date, or overwrite if appropriate.
- Enter the EMPLID of the employee to whom the materials are being issued.
- Enter the Unit Price.
- Repeat these steps to charge additional materials to this work order.

- Documenting Work Performed – Work Order closing notes will be entered in the Tasks Tab of the Work Order Form.
- Click on the Task List Tab of the *Work Order Closing* Form.
- Add comments as necessary.
- Readings
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- Access the Readings Window by Pressing the Readings Tab.
- Preventive Maintenance Work Orders may have Readings that are taken and documented on the printed Work Order Ticket. If so, you will document the Date Taken, As Found Value and As Left Value for each Condition Type listed.

- Close the Work Order Closing Form.

**Step 6: Viewing Work Order Cost Summary**

- Highlight the WO Number of your choice by single-clicking the WO Number in the WO Number Column with the left-mouse button.
- Right-click to produce the Work Order drop-down menu.
- Select Cost Summary.
- The Work Order Cost Summary Form should appear with the highlighted Work Order already displayed.

**FAMIS Work Order Cost Summary Form - Figure 22.**

- Review the Summary information.
- Access the other Costing Tabs to review detailed information for Labor, Material, Invoices, Miscellaneous Cost and Adjustments.
- The Billed Tab is used to view information concerning charges that have been extracted and billed to the customer (sent to PeopleSoft).
- Ask you instructor for clarification, if you have any questions.
- Close the Work Order Cost Summary Form.
Step 7: Viewing Reports

When a FAMIS report is executed a parameter screen is typically displayed. The parameter screen provides the user with the option of limiting the data included in the report by entering report parameters.

- Press the Reports Button.
- Highlight the report for Work Order Detail by Crew Report.
- Press the Run Report Button.
- You will be prompted to log in to the Reports Server. Use the same Username/Password/Database used to login to FAMIS.
- The report parameter screen will be displayed.
- The default Orientation is selected by FAMIS Software according to the report layout. The user can select a different Orientation, but it is not recommended.
- Enter criteria in the Report Parameter fields, as needed.
  
  NOTE: Report Parameter forms are case-sensitive. Criteria must be entered in UPPERCASE. Dates must be entered in the following format:

  DD-MON-YYYY (Example: 01-DEC-2004).

- Select the Submit Query Button.
- The report output will be displayed to the screen using the Adobe Acrobat Reader once the report has been generated by FAMIS.
- The scroll bars (bottom and right side of report display form) can be used to view an entire page of the report on the screen.
- Additional pages can be viewed using the navigation arrows at the bottom of the report.
- The report can be printed after being viewed by pressing the Print Button on the Adobe Acrobat Toolbar.
- To close the report, close the web-browser window (using the X in the top-right corner of the window).
- Close the Reports List.
Step 8: Viewing Related Project

- If a Work Order that is related to a Maintenance Project is highlighted, the View PR Button will become active.
- Click the View Pr Button to access the Project Plan Form. The Project associated with the highlighted WO will be displayed.
- Close the Project Plan Form.

Step 9: Print a Work Order Ticket

- Select the Work Order(s) you wish to print, using the Select Checkbox column to the left of the Current Schedule Form.
- Press the Print Button.
  
  NOTE: The Print Work Order Ticket Window should be displayed. If not ask your instructor for assistance.
- Press the OK Button.
- The Print Server Dialog Window should be displayed. If not, ask your instructor for assistance.
EXERCISE 7 – CREATE A CHILD WORK ORDER

In this Exercise you will learn how to create a Child Work Order.

Multiple Trade Work Orders will primarily be handled as Parent/Child Work Orders, when no particular crew is in charge of the overall completion of the work. Additional guidelines regarding when to use Primary/Secondary Crews on a single work order vs. creating Parent/Child work orders will be given at the campus level.

Step 1: Access the Work Order Form

• Access the Work Order Form using the FAMIS Navigator.

Step 2: Query the Existing Work Order

• Using the techniques you have previously learned, query an existing Work Order.

  For this exercise, query a Work Order that is assigned to you. In actual practice, you will query the Work Order using the Work Order Number or other known criteria.

• Press the Create WO Button to the right of the Work Order Form. A new Work Order will be created, as shown in the figure below:

  FAMIS Work Order Form – Figure 23.

• Did you notice that the Parent WO Field was filled in for you?
• Enter the Description information to indicate the work to be done by the second crew.

• General Information – change as needed.

• Status – OPEN.

• Request Dates – change the Start Date and Due Date, as needed.

• Enter Crew.

• Enter Requestor information:
  o Press the Request Button to the right of the Work Order Form.
  o Change the Requestor information as needed. (Use the List of Values to query existing Requestors.)
  o Close the Request Window.

Step 3: Specify the Billing Information for the Work

Billing account information will default from the Parent Work Order. If the account information needs to be changed for the Child Work Order, access the Billing Form and change the account information as needed.

Step 4: Tasks (Work Plan)

• Access the Tasks Form by pressing the Tasks Tab.

• Enter task information to describe the work being requested, if required.

• Save the Work Order.

Step 5: View Parent/Child Work Orders

• Access the list of Related Work Orders by pressing the Related WO Button on the Work Order Form.

• When viewing Related WO’s from the Parent Work Order, FAMIS will display the Parent and all Child Work Orders that are related to the Parent.

• Close the Work Order Form.
EXERCISE 8 – STANDING WORK ORDERS

In this Exercise you will learn how to access the Standing Work Order Form, and Enter a New Standing Work Order.

Standing Work Orders are often used to track costs which are not easily associated with a specific Job, such as shop supplies and “non-wrench” time.

Step 1: Access the Standing Work Order Form

- Start the Standing Work Order Form using the FAMIS Navigator.

FAMIS Standing Work Order Form – Figure 24.
3.0 Materials and Services

**EXERCISE 9 – MATERIAL CATALOG**

In this exercise you will learn to access the FAMIS Material Catalog, find a part and view information regarding materials.

*Step 1: Access the Material Catalog Form*

- Start the **Material Catalog** Form using the FAMIS Navigator.

*FAMIS Material Catalog Form – Figure 25.*

*Step 2: Search for a Part by Description*

- Press the *Enter Query* button on the Toolbar. (Magnifying Glass with a Yellow Question Mark)
- Type part of the description in the **Description** column, using wildcards.
- Press the *Execute Query* button on the Toolbar.

*Step 3: View a Part*

- Select the Part of your choice by clicking on it with your mouse.
- Note the quantity on hand, etc. to the right of the description.
• Note the expanded description information at the bottom of the form.
• Press the View button.
• Review additional information regarding the part.
• Close the Part Master window.

**Step 4: Find a Part by Category**

• Press on the By Category tab.

![FAMIS Material Catalog Form – Figure 26.](image)

**FAMIS Material Catalog Form – Figure 26.**

• Select the Category of your choice by using your mouse to “drill down” in the window at the left side of the form.
• Select the Part of your choice on the right side of the form and review using the techniques you just learned.

**Step 5: Find a Part by Manufacturer**

• Press the By Manufacturer tab.
• Enter a Manufacturer Code (Use List of Values) AND/OR
• Enter a Manufacturer Part Number.
• Press the Find Button.
Step 6: Find a Part by Vendor

- Press the By Vendor tab.
- Enter a Vendor Code (Use List of Values) AND/OR
- Enter a Vendor Part Number.
- Press the Find Button.
- Close the Material Catalog.
EXERCISE 10 – ISSUE REQUEST

In this Exercise you will learn how to request stock materials from a Warehouse using the Issue Request form, how to Stage the materials, and how to find Material Documents.

Step 1: Select a Work Order Requiring Materials

- Access one of the work orders you created by using the Current Schedule.

Step 2: Access the Issue Request Form

- Press the Parts tab.
- If the work order has a Parts List, it will be displayed at the top of this form.
- Previously submitted Issue Requests will display at the bottom of this form.
- Press the Issue Request button.

FAMIS Issue Request Form - Figure 27.

- The MDOC No. (Material Document) will be assigned by FAMIS.
- The Status is controlled automatically by FAMIS as follows:
  - While the request form is incomplete, the status will be 'CREATING.'
  - Once the Submit button is pressed, the status will change to 'SUBMITTED.'
  - If the requested part needs to be backordered, the Status field will be set to 'BACKORDER.'
  - If the requested part is available in the warehouse, the status will be 'AVAILABLE.'
• If some, but not all, of the requested material is available, the status will be 'PARTIAL.'
  o When the material is issued, the status will be 'ISSUED.'
  o When the material has been staged, the status will be 'STAGED.'
  o If the request is cancelled, the status will be 'CANCELED.'
• The Warehouse auto-fills with your default Warehouse, but you may change it to request parts from a different Warehouse.
• The Work Order Number will be pre-populated.
• Do not check the Stage Parts checkbox.
• Enter a Pick Up Date if appropriate.
• The Requestor and Telephone information is automatically filled in using the logged-in user.
• Enter Special Instructions if appropriate.
• The Stage Location field will not be entered here. This field is used only to query existing Issue Requests by their Staging Location.
• Enter the first requested Stock Part Number. You may also use the buttons at the bottom of the form to find desired Part Numbers.
  o The WO Parts List button may be used to view any parts listed on the work order entered above.
  o The Bills of Mat’l. button may be used to view any Bills of Material and associated parts for an Equipment Number listed on the work order if applicable.
  o The Part Search button may be used to invoke the standard Material Catalog.
• Once a Part Number has been entered on the Issue Request form, the View button will become active and may be used to view the Part Master window for the selected part.
• Press the Submit button to save the request and submit to the chosen Warehouse.

• What is the Material Document Number? ______________________

• What is the status of the Issue Request? ______________________

• An Issue Request will automatically print for the Requestor and in addition, if properly configured, a copy will print in the Warehouse.
FAMIS Issue Request Report - Figure 28.

**Note:** The Cancel Request button may be used by the original Requestor to cancel the entire Issue Request, if it has not yet been issued.
EXERCISE 11 – CREATE A PURCHASE REQUISITION FROM A WORK ORDER

In this exercise you will learn how to enter a new Purchase Requisition from the Work Order Form.

Step 1: Access the Purchase Requisition Form.

- Access the work order for which you need to create a Requisition
- Press the PO’s tab
- Press the Orders button
- Press the Create Preq button
- The Purchase Requisition Form will be displayed, as shown in the figure below:

![FAMIS Purchase Requisition Form - Figure 29.](image-url)
### Step 2: Create a Purchase Requisition for Direct Materials

- FAMIS will assign a *Purchase Requisition* Number.
- FAMIS will populate the *Requested By* information based on the Employee who is logged into FAMIS creating the record.
- The Purchase Type will be INVENTORY.
- The default Status is APPROVED. The status may change automatically after the Line Item detail has been entered. Do not change at this time.
- Click on the *Add Line* Button.

**FAMIS Purchase Requisition Line Form - Figure 30.**

- Enter a Date Required for this line, if appropriate.
- The Work Order Number will be filled in based on the work order from which you accessed this form.
- FAMIS will auto-populate the *Warehouse* field based on the user’s default Warehouse.
- **Enter the appropriate Direct Part Number.**
- Enter a Commodity Code if desired.
- Enter the Suggested Vendor if desired (use LOV if necessary).
- Enter the Employee ID for the Buyer in the Buyer field, if you need to “send” this PREQ to a specified Buyer.
• Enter the Description for this line.
• Select a Unit of Purchase (Uop).
• Enter the Quantity for this line.
• Enter a Unit Price for this line.
• Press OK to close the Line Item form.
• Note the change in status for the Purchase Requisition.
• Press the Add Line button to add additional lines if appropriate.
• Close the Purchase Requisition Form.
EXERCISE 12 – CREATE A PURCHASE REQUISITION DIRECTLY

In this exercise you will learn how to enter a new Services Purchase Requisition using the Purchase Requisition Form.

Step 1: Access the Purchase Requisition Form.

- Open the Purchase Requisition Form from the FAMIS Navigator, as shown in the figure below:

Step 2: Create a Purchase Requisition for Services

- FAMIS will assign a *Purchase Requisition* Number.
- FAMIS will populate the *Requested By* information based on the Employee who is logged into FAMIS creating the record.
- The Purchase Type will be SERVICE.
- The default Status is APPROVED. The status may change automatically after the Line Item detail has been entered. Do not change at this time.
- Click on the *Add Line* Button.
  - Enter a Date Required for this line, if appropriate.
  - Enter the Work Order Number (Required).
  - FAMIS will auto-populate the *Warehouse* field based on the user’s default Warehouse.
  - **No Part Number will be entered.**
  - Enter a Commodity Code if desired.
  - Enter the Suggested Vendor if desired (use LOV if necessary).
  - Enter the Employee ID for the Buyer in the Buyer field, if appropriate.
  - Enter the Description for this line.
  - Select a Unit of Purchase (Uop).
  - Enter the Quantity for this line.
  - Enter a Unit Price for this line.
  - Press *OK* to close the Line Item form.
- Note the change in status for the Purchase Requisition.
- Press the *Add Line* button to add additional lines if appropriate.
- Close the *Purchase Requisition* Form.
EXERCISE 13 – PURCHASE REQUISITION APPROVAL FORM

In this exercise you will learn to Approve a Purchase Requisition using the Purchase Requisition Approval Form.

Step 1: Find Purchase Requisitions to Approve

- Access the Purchase Requisition Approval Form.
- Execute a query using your Employee ID in the Next Approver field.

Step 2: Approve a Purchase Requisition

- The Purchase Requisition Approval Form will appear:

![FAMIS Purchase Requisition Approval Form - Figure 31.](image)

- Press the Execute Query Button to find PREQs that are waiting for your approval.
- Select a Line Item and press the View Line button to view the PREQ details.
- Check the Approve or Reject box for each Line Item.
- Press the Approve/Reject button at the bottom of the form.
- A dialog box will appear confirming the action you have taken. Press the OK button.
• Navigate to the next record using the Next button on your FAMIS Toolbar (or the Down Arrow on your keyboard).

• Approve remaining PREQs.

• Close the Purchase Requisition Approval form.
EXERCISE 14 – VENDORS

In this exercise you will learn to access the Vendor Form, search for a Vendor, and enter a new Vendor record.

Step 1: Find a Vendor

- Access the Vendor Form using the FAMIS Navigator. The Vendor Form will open as shown in the figure below:

FAMIS Vendor Form - Figure 32.

When the Vendor Form is opened, you are in Data Entry Mode. You must enter Query Mode to search for an existing Vendor record.

Step 2: Simple Query

- Enter Query Mode

(Magnifying Glass with Yellow Question Mark)

NOTE: The quickest way to place the cursor in the field is by using the mouse. You can also use the Tab key to move one field at a time until the cursor is in the specified field.
• Fields that may be queried will be displayed in BLUE at this time.

• Use the List of Values Button to the right of the Payment Term Field to select a Payment Term to use in your query.

• **Execute Query**

  ![Green Traffic Light]

• Queries resulting in multiple records will be displayed one record at a time.

• Navigate resulting records using the Toolbar.

  **NOTE:** If not records were found matching the Payment Term you selected, FAMIS will display a message at the bottom of your screen indicating “Query caused no records to be retrieved.” Select a different Payment Term and execute the query again.

**Step 3: Complex Query**

A complex Query is performed in the same manner. However, instead of one field being queried there would be at least two fields being queried.

• **Enter Query Mode**

  ![Magnifying Glass with Yellow Question Mark]

  **NOTE:** The quickest way to place the cursor in the field is by using the mouse. You can also use the Tab key to move one field at a time until the cursor is in the specified field.

• Fields that may be queried will be displayed in BLUE at this time.

• Enter search criteria in two or more fields.

• **Execute Query**

  ![Green Traffic Light]

• Queries resulting in multiple records will be displayed one record at a time.

• Navigate resulting records using the Toolbar.

**Step 4: Repeat Query Criteria**

• **Repeat Query**

  ![Magnifying Glass with Yellow Question Mark- twice]

• Enter new or additional query criteria.

• **Execute Query**

  ![Green Traffic Light]
**Step 5: Query Using Wild Cards**

- The percent sign (%) is used to replace multiple missing characters (e.g. Find all Descriptions that contain the word GRAINGER by using ‘%GRAINGER%’ in the Query).
- The underscore (_) is used to replace a single missing character (e.g. Find the last name of WHYTE or WHITE by using ‘WH_TE’ in the Query).

**Enter Query Mode**

![Magnifying Glass with Yellow Question Mark]

*NOTE:* The quickest way to place the cursor in the field is by using the mouse. You can also use the Tab key to move one field at a time until the cursor is in the specified field.

- Fields that may be queried will be displayed in BLUE at this time.
- Use the cursor to navigate to the Vendor name field (to the right of the Vendor Number field).
- Enter a portion of the Vendor’s Name with a % sign in front of and following the text entered. (The % sign is used as a Wild Card.)

**Execute Query**

![Green Traffic Light]

- Note the number displayed at the bottom left corner of your screen. (Record 1/?) As your Instructor what this message means.
- Queries resulting in multiple records will be displayed one record at a time.
- Navigate resulting records using the Toolbar.

**Step 6: Count Hits**

- **Repeat Query**

  ![Magnifying Glass with Yellow Question Mark](twice)

  - Note that the information entered in the previous Step is entered for you.

- **Count Hits**

  ![Magnifying Glass with Summation Sign]

  - Note the message displayed at the bottom of your screen that indicates how many records will be retrieved.

- **Execute Query**

  ![Green Traffic Light]
EXERCISE 15 – CHANGE ORDERS

In This Exercise you will learn how to find and create a Change Order.

Step 1: Find/View an Existing Change Order

- Access the Change Order Form using the FAMIS Navigator as shown below:

![FAMIS Change Order Form - Figure 33.](image)

- Enter Query mode using the Enter Query button on the Toolbar.
- Query a Change Order using the techniques you have learned.

**NOTE:** Change Orders are only entered for Services PO’s. Inventory PO’s are changed by simply editing either the Line Item Price or Quantity on the Purchase Order form itself.

- View original PO line information.
- View PO lines **added** by Change Orders.
• View PO lines changed by Change Orders.

**Step 2: Create a Change Order**

• Press the *Insert* button on the Toolbar.
• Enter the SERVICE Purchase Order Number requiring the Change Order.
• Enter the Vendor’s CO Number if applicable.
• Enter a description for the Change Order.
• Leave the default value of CHANGE for the POCO Type.
• Leave the default value of REQUESTED for the PO CO Status.
• If the Change Order is to add a Line Item to the PO, press the *New Line* Button.
  o Enter the PREQ and PREQ Line Number if applicable.
  o Enter the Work Order Number. (Mandatory) (Use List of Values if necessary.)
  o Enter Required and Promised Dates if applicable.
  o Enter Description for the new line.
  o Enter Quantity.
  o Enter Price.
  o Press OK.
• If the Change Order is to change an existing PO line, navigate to the PO CO Line Information area at the bottom of the form.
  o Enter the PO Line Number that the Change refers to.
  o Enter a description for the change to this line.
  o Enter a Reason Code for the change. (Use List of Values.)
  o Enter a Dollar amount (+/-) (A dialog box will appear asking if this is a change in the unit cost or a change in the line item total.)
  **OR**
  o Enter a change in the number of days.
• Save the Change Order.
• Press the *Approve* Button to approve the CO. The status is changed to APPROVED.
• Save the Change Order.
• Change the Status to PLACED.
• Close the Change Order Form.

**Step 3: View Change Orders from the PO form**

• Access the *Purchase Order* Form using the Navigator.
• Query the PO for which you wish to view Change Orders.
• Review the Original PO Amount and the Current PO Amount.
• Press the ChgOrders Button.
• The PO Changes window will appear displaying all Change Orders for this PO.

![FAMIS PO Changes Window- Figure 34.](image)

- Press the View button to view the Change Order form.
- Press the Print CO button to Print the Change Order.
- Close the PO Changes window.
- Close the Purchase Order Form.
EXERCISE 16 – FIND ORDERS USING A WORK ORDER NUMBER

In this exercise you will learn how to use the Work Order Form to find Purchases associated with a specific Work Order.

Step 1: Query an Existing Work Order

- Access the Work Order Form through the FAMIS Navigator.
- Using the techniques you have already learned, query a Work Order using a Work Order Number provided by your Instructor.

Step 2: Review Orders Information

- Press the Orders Tab.
- Press the Orders Button.
- FAMIS will display a list all Active Purchase Requisitions and Purchase Orders associated with the Work Order you queried, as shown below:
- To include Completed Orders in the list select the All Orders Radial Button.

FAMIS Work Order Orders Tab Form – Figure 35.
• To view details about a specific Requisition or Order, select a record and press the View Button.
• Close the Orders Form.
• Close the Work Order Form.
EXERCISE 17 – WORK ORDER COST SUMMARY

In this exercise you will learn how to use the Work Order Cost Summary Form to find all charges incurred against a specific Work Order.

Step 1: Access the Work Order Cost Summary Form

- Access the Work Order Cost Summary form using the FAMIS Navigator.
- Query an existing Work Order using the techniques you have learned.
- The Work Order Cost Summary Form should appear with the highlighted Work Order already displayed.

Step 2: Review Work Order Cost Details

- Review the Summary information.
- Access the other Costing Tabs to review detailed information for Labor, Material, Invoices, Miscellaneous Cost and Adjustments.
- The Billed Tab is used to view information concerning charges that have been extracted and billed to the customer (sent to PeopleSoft).
- Ask you instructor for clarification, if you have any questions.
- Close the Work Order Cost Summary Form.
EXERCISE 18 – TRANSFER APPROVAL AUTHORITY

In this exercise you will learn how to transfer your Requisition Approval Authority to another FAMIS user for a limited period of time.

Step 1: Access the Transfer Approval Authority Form

- Access the Transfer Approval Authority Form through the FAMIS Navigator.

Step 2: Transfer Your Approval Authority

- Your Employee ID will already be populated.

FAMIS Transfer Approval Authority Form – Figure 37.

- Enter the Employee ID of the person to whom you wish to transfer your authority. *(Use List of Values if necessary.)*
- Enter Start Date
- Enter End Date
- Check the Purchase Requisition Approval box
- Close the Transfer Approval Authority Form.
4.0 Other Tools

**EXERCISE 19 – FACILITY WORKBENCH**

In this Exercise you will learn how to access and utilize the Facility Workbench, view a backlog of open work orders, and create new Service Requests from the Facility Workbench.

**Step 1: Access the Facility Workbench Form**

- Use the FAMIS Navigator to access the *Facility Workbench*.

![FAMIS Facility Workbench Form – Figure 38.](image)

- The *Facility Workbench* will automatically display all active Facilities. A Facility is generally a Building, but can also be a land entity such as a parking lot, athletic field, etc.

- You can use the techniques you have previously learned to create private views for the Facility Workbench.
Step 2: View a List of Equipment for a Facility

- Highlight the Building of your choice and press the Equipment Button.
- The Equipment Listing window will open displaying all equipment associated with the highlighted Building.
- Highlight an Equipment record and press the View button to view the Equipment Form.
- Close the Equipment Form.
- Close the Equipment Listing Window.

Step 3: View Facility Notes

- Highlight the Building of your choice and press the Notes Button.
- The Building Attachments window will open displaying all Notes associated with the highlighted Building.
- Highlight a Note Title in the upper section of the form to display the Note Text in the lower portion of the window.
- Close the Building Attachments Window.

Step 4: View Work Order Backlog

- Highlight the Building of your choice and press the WO Backlog Button.
- The Current Schedule will open displaying all active Work Orders associated with the highlighted Building.
- Utilize the Current Schedule using the techniques previously learned.
- Close the Current Schedule Form.

Step 5: View Work Order History

- Highlight the Building of your choice and press the WO History Button.
- A window will open displaying ALL Work Orders associated with the highlighted Building (including those that have been closed).
- Highlight a Work Order record and press the View button to view the Work Order Form.
- You may also highlight a Work Order Number and right-click your mouse to display the typical drop-down menu including “View/Edit”, “Close”, “Cost Summary”, and “Print” options.
- Close the Work Orders window.
- Close the Facility Workbench.
Step 6: *Create a New Service Request for a Facility*

- Highlight the Building of your choice and press the *Create SR* Button.
- The *Service Request* form will open with the Site and Building fields already populated.
- Enter appropriate data in other fields as you would using the techniques you have learned.
- Close the *Service Request* Form.
EXERCISE 20 – THE LOCATION WORKBENCH

In this exercise, you will learn about the Location Workbench. The Location Workbench Form is used to display a summary of location information. The particular records displayed can be customized for particular users by configuring "Views." A view contains the specific criteria that locations must meet to be included in the location workbench table. The view also determines the format in which location information is displayed.

- A view labeled "All Rooms" is created during the installation of FAMIS Space Management.

FAMIS “All Rooms” View in Location Workbench – Figure 39.
• Select a different view by using the drop down arrow to the right of the view field.
• To create a new view, or edit an existing view, press the *Edit View* button.

**Editing a Location Workbench View – Figure 40.**

• Click the *Duplicate View* button to create a copy of the current view.
Duplicating the Current View – Figure 41.

- Enter a name for the new view you are creating

Naming the New View – Figure 42.

- Click the Filter Tab to create or modify filters affecting the new view.

The Filter Tab – Figure 43.
• Select a field or fields on which you wish to create filters.

Creating a Filter on the Building Field – Figure 44.
• From the Dropdown list, select the desired filter criteria.

![Setting Filter Criteria – Figure 45.]

• The Advanced Filter button allows you to further specify the desired criteria by building WHERE clauses that affect the new view.

• When finished creating or editing criteria for the new view, navigate to the Display Tab and click the OK button to save the changes. The results of the new view will be displayed.
The Results of the New View – Figure 46.
• Buttons on the Location Workbench allow the user to view building info for the highlighted row (Arrow 1), or edit Site, Building, Floor, or Room information for the selected row (Arrows 2-5).

FAMIS Location Workbench Action Buttons – Figure 47.
Normally, changes made to location records are reflected immediately in the Location Workbench Form. However, in some cases, changes made to the Assigned to Department and Occupied by Department fields are only updated once daily. If you know that changes have been made to these fields and want the Location Workbench form to display the updated data immediately, press the Refresh View button. After the refresh is complete, the system will display the message, "The refresh has finished."

The Refresh View Button – Figure 48.
• The Graph Button Launches the Graphic report Server (GRS) Report request Form (if the GRS is installed). GRS reports can be requested based only on the spaces which meet the current Location Workbench criteria.

The Graph Button – Figure 49.

• Close the Location Workbench form.


5.0 Labor/Personnel

EXERCISE 21 – ENTERING LABOR CHARGES

In this exercise you will learn to charge labor to a Work Order, either for yourself or other Employees.

Step 1: Access the Labor Charges Form

- Start the Labor Charges form using the FAMIS Navigator.

FAMIS Labor Charges Form – Figure 50.

Step 2: Enter Employee Labor Charges

- FAMIS defaults the Employee field automatically to your name when you access the form, unless you have been granted the privilege to enter labor for employees other than yourself, based upon the Security Group that has been applied to your User Name. Your name (based on your login for this class) should be displayed as your Employee ID.
- Enter the Employee if you need to enter labor for another Employee.
- FAMIS defaults the Work Date to the current date when the form is accessed.
• Overwrite the Work Date to the date work was performed. *(Use List of Values if necessary.)*
• Enter the Work Order number. *(Use List of Values if necessary.)*
• Hours - Enter the number of hours for the days work on this Work Order.
• Pay Code – FAMIS will default the Pay Code of “H01-REG”. Accept this value by tabbing to the **Labor Class** field.

  **NOTE:** *Use the List of Values if necessary to select a different Pay Code. The first 3 characters.*

• Labor Class – FAMIS will default the Labor Class value that is associated with the Employee for which the labor record is being entered. Accept this value by tabbing to the **Comments** field
• Comments – You may enter more detailed comments, as required, to give further explanation for the labor activity.
• Work Done?

  **NOTE:** *Check this box only if all work activity associated with this Work Order is completed. By checking this box, the Work Order will remain Active, but will be given a status of “COMPLETE”. It will therefore appear on the Current Schedule of the Maintenance Manager for final review of costs prior to Closing the Work Order.*

• Tab to the next line and enter the next Work Order for *this* Employee on *this* date, if necessary.
• Press the **Save And Approve** button when you complete your labor entry.
• Overwrite the default name if necessary, to enter the next timecard.
The FAMIS Paycodes used by NDUS are listed here. The first three characters of each Paycode match the name of an equivalent Earnings Code in PeopleSoft HRMS.

<table>
<thead>
<tr>
<th>Paycode</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>H01-REG</td>
<td>Regular Hours Worked Hourly and Salaried</td>
</tr>
<tr>
<td>H03-OT/LR</td>
<td>Employee Overtime (after 8 hours) paid at 1.5, bill 1.0</td>
</tr>
<tr>
<td>H03-OTREG</td>
<td>Employee Overtime (after 8 hours) paid at 1.5, bill 1.5</td>
</tr>
<tr>
<td>H12-CALLB</td>
<td>Employee Callback Labor</td>
</tr>
<tr>
<td>H14-WSTY</td>
<td>Work Study Labor (Hourly Only)</td>
</tr>
<tr>
<td>H20-SICK-S</td>
<td>Sick Leave Used - Salaried Employees</td>
</tr>
<tr>
<td>H21-DML-S</td>
<td>Dependent Sick Leave Used - Salaried Employees</td>
</tr>
<tr>
<td>H22-VAC-S</td>
<td>Annual Leave Used - Salaried Employees</td>
</tr>
<tr>
<td>H23-COMP-S</td>
<td>Comp Time Used Salaried</td>
</tr>
<tr>
<td>H24-HOLI-S</td>
<td>Holiday Salaried</td>
</tr>
<tr>
<td>H25-FUNR-S</td>
<td>Funeral Leave Salaried</td>
</tr>
<tr>
<td>H26-MILT-S</td>
<td>Military Leave Salaried</td>
</tr>
<tr>
<td>H27-JURY-S</td>
<td>Jury Duty Salaried</td>
</tr>
<tr>
<td>H30-SICKHR</td>
<td>Sick Leave Used - Hourly Employees</td>
</tr>
<tr>
<td>H31-DS HR</td>
<td>Dependent Sick Leave Used - Hourly Employees</td>
</tr>
<tr>
<td>H32-VACHR</td>
<td>Annual Leave Used - Hourly Employees</td>
</tr>
<tr>
<td>H33-COMPTK</td>
<td>Comp Taken - Hourly</td>
</tr>
<tr>
<td>H34-HOLHR</td>
<td>Holiday - Hourly</td>
</tr>
<tr>
<td>H35-FUNHR</td>
<td>Funeral Leave - Hourly</td>
</tr>
<tr>
<td>H36-MILHR</td>
<td>Military Leave - Hourly</td>
</tr>
<tr>
<td>H37-JURYHR</td>
<td>Jury Duty - Hourly</td>
</tr>
<tr>
<td>H53-COMPE</td>
<td>Comp Earned</td>
</tr>
<tr>
<td>HHO-HZOT</td>
<td>Hazard Pay OT-Base +6.25</td>
</tr>
<tr>
<td>HHR-HZREG</td>
<td>Hazard Pay Reg-Base +6.25</td>
</tr>
<tr>
<td>HS1-SD1</td>
<td>Shift Diff (Base +.29) Reg</td>
</tr>
<tr>
<td>HS2-SD2</td>
<td>Shift Diff (Base +.40) Reg</td>
</tr>
<tr>
<td>HS3-SD3</td>
<td>Shift Diff (Base +.75) Reg</td>
</tr>
<tr>
<td>HT1-SD1OT</td>
<td>Shift Diff OT-Base +.29</td>
</tr>
<tr>
<td>HT2-SD2OT</td>
<td>Shift Diff OT-Base +.40</td>
</tr>
<tr>
<td>HT3-SD3OT</td>
<td>Shift Diff OT-Base +.75</td>
</tr>
</tbody>
</table>
EXERCISE 22 – SUPERVISOR LABOR APPROVAL

In this exercise you will learn to review, edit, and approve Labor Charges which have been entered by your Employees.

Step 1: Access the Supervisor Labor Approval Form

- Start the Supervisor Labor Approval form using the FAMIS Navigator.

FAMIS Supervisor Labor Approval Form – Figure 51.

Step 2: Review/Edit Employee Timecards

- By default, the previous day’s date will be displayed.
- Move to a different date by using the “<” and “>” buttons.

**HINT:** If you need to move more than a few days in either direction, you can mouse-click the date itself to invoke a calendar from which you select the date you wish to view, using your mouse.

- FAMIS defaults the Supervisor field automatically to your name when you access the form.
• All Employees who have your ID entered as the **Supervisor** on their Employee record will appear down the left side of the form.

• Highlight the Employee of your choice.

• The highlighted Employee’s timecard for this date will be displayed.

• Any exceptions and warnings for this Employee/Date will be displayed at the bottom of the form.

• Press the **Edit** button.

• The **Labor Charges** form will appear for this Timecard.

• Edit the Timecard as appropriate.

  **NOTE:** *If you need to adjust a Timecard entry, DO NOT alter or delete an existing labor row. Rather, make sure that any Timecard edits are made by inserting offsetting rows (e.g. Make a negative entry to remove or reduce an existing row or a positive entry to apply corrected Work Order, Pay Code or additional Hours). Make sure that the Total Hours amount is correct prior to saving the corrected Timecard.*

• Press the **Save And Approve** button when you completed the Timecard edits.

• Close the **Labor Charges** form.

**Step 3: Approve Employee Timecards**

• Highlight the Employee whose timecard you wish to approve for the selected date.

• Press the **Approve** button.

• A window will appear to confirm that you wish to approve this timecard.

• Press **Yes**.

  **NOTE:** *You can select “Reject” rather than “Approve” to leave the Timecard in an Unapproved status to allow the Employee to correct any problems. Alternatively, you can press the “Edit” button and edit the timecard yourself so that you may approve it without delay.*

• Repeat for other Employees as appropriate.

**Step 4: Reject Employee Timecards**

• Highlight the Employee whose timecard you wish to reject for the selected date.

• Press the **Reject** button.

• A window will appear with list of rejection reasons. Select the appropriate rejection reason.

• Press the **OK** button.
Step 5: Find Unapproved Employee Timecards

- Navigate to the *Unapproved Timecards* tab to insure that all Timecards for your Employees have been properly approved.

- If any Unapproved Timecards appear, press the *Edit* button to open the *Labor Charges* form for editing purposes, or press the *Go To Approval* button to return to the *Timecard* tab and view the Timecard for the unapproved date.

- Close the *Supervisor Labor Approval* form when all Labor has been approved (or rejected).
EXERCISE 23 – LABOR REPORTS

In this exercise you will learn to access and execute Labor Reports.

Step 1: Access the Labor Detail Report by Employee Name

- Select the Labor Detail by Employee Name Report from the FAMIS Navigator.
- You will be prompted to login to the Reports Server the first time you run a report during the current session. Use the same Username/Password/Database used to start FAMIS.
- The report parameter screen will be displayed, as shown in the figure below:

```
Parameter Value Input Form
Enter the parameter values

Employee
Crew
Craft
Labor Class
Beginning Enter Date
Ending Enter Date
Beginning Work Date
Ending Work Date
Social Security No.

FAMIS Report Parameter Form - Figure 52.
```

NOTE: Oracle Report Parameter Forms are case sensitive, i.e., Crew or Employee names must be entered using UPPERCASE letters or the report will not return the correct information.
• Specify an Employee for the report.

  OR

• Specify a Crew for the report.

  ALSO

• Specify a Beginning Work Date and Ending Work Date for the report.

**NOTE:** All date parameters MUST be enter using the following format “DD-MMM-YYYY” (e.g. 27-MAY-2005). Dates applied using other formats will not be recognized and will not return any results

• The default **Destype** is **Cache**, which will allow the report to be viewed on the screen. Other **Destype** values, such as Printer or Preview, can be selected by the user.

• The default **Orientation** is selected according to the report layout. The user can select a different **Orientation**, but it is not recommended.

• Select the **Submit Query** Button.

• The report output will be displayed to the screen once the report has been generated by FAMIS.

• The scroll bars (bottom and right side of report display form) can be used to view an entire page of the report on the screen.

• The **Page** Buttons (**Prev**, **Next**, **First**, **Last**) can be used to view subsequent report pages. If the **Page** Buttons are grayed out, the length of the report is only one page.

• The report can be printed after being viewed by pressing the **PRINT** button.

  • To close the report Select the **CLOSE** button.
DEMONSTRATION – STANDING WORK ORDERS

In this demonstration you will learn how to access the Standing Work Order form and find an existing Standing Work Order.

Step 1: Access the Standing Work Order Form

- Access the **Standing Work Order** form using the FAMIS Navigator.

  **NOTE:** The Standing Work Order form should now be displayed.

![FAMIS Standing Work Order Form – Figure 53.](image)

  **NOTE:** Standing Work Orders are often used to track costs which are not easily associated with a specific Job, such as shop supplies or “non-wrench” time.

Step 2: Find a Standing Work Order

Enter a query mode by pressing the **Enter Query** button.

Enter the Standing Work Order number that you want to query into **SWO Number** field.

Execute your query by pressing the **Execute Query** button.

Step 3: Viewing the Standing Work Order Details

- Navigate through the Standing Work Order details.
• Main Tab.
• Review the following areas:
    • Brief Description – Brief description of work to be performed.
    • General Information – Status, Maintenance type, Method to conduct work, whom the work is Assigned To, default Paycode, Department the work is being performed for, etc.
    • Labor Requirements – Crew, Craft and estimated labor requirements to complete the work activity.
    • Location – Site, Building, Floor and Room where work is to be performed.
    • Billing – Billing type, and account source(s).
    • Budget – Estimated costs for Labor, Materials and PO’s.
    • Dates – Historical dates relating to selected standing work order.
    • Tasks Lists – Detailed task list of work to be performed.
    • Location Allocation – Locations and cost distribution percentages to be used for Actual Costs.
• Close the Standing Work Order form.
PROCESS DISCUSSION – TERMINATING AN EMPLOYEE

In this section, we will discuss the process of terminating an employee and modifying records within FAMIS that are related to that employee.

NORTH DAKOTA UNIVERSITY SYSTEM
FACILITIES MANAGEMENT
SEPARATION OF EMPLOYMENT DOCUMENT

Effective Date: ________________________

Employee Name: __________________________ EMPL ID # ____________________

Crew Assigned: __________________________

List Employees Supervised in FAMIS: ______________________________________

Supervisor Name: _________________________

Person to assume supervisory duties in FAMIS:
1. Name ________________________________

2. Employee ID ___________________________

Is terminated employee listed as “assign to” on any work orders? Yes_____ No _____

If yes, name of person to take over the “assign to” on work orders:
1. Name ________________________________

2. Employee ID ___________________________

Is terminated employee listed as the “requestor” on any service Purchase Orders?
Yes_________ No__________

If yes, name of person to take over the “requestor” role for approving Service PO’s.
1. Name ________________________________

2. Employee ID ___________________________

Number of uniforms turned in ____________

Documentation completed by: _____________________________________________
Supervisor of terminated employee

Changes entered in FAMIS by: _______________________________ Date ____________

NDUS Separation of Employment Document – Figure 54.

The following records within FAMIS are potentially effected when an employee is terminated. The NDUS Facilities Management Separation of Employment Document outlines the specific field level edits which should be made.
• Employee form:
  • Insert the effective date of the employee being terminated in the *Termination Date* field.
  • Update the *Supervisor* field for all active employees that previously were supervised by the terminated employee.

• Work Order/Standing Work Order & Project Plan form:
  • Update the *Assigned To* field for all active records that were previously assigned to the terminated employee.
  • Update the *Project Manager* field for all active projects that were previously managed by the terminated employee.

• Purchase Order form:
  • Update the *Requestor* field for all active records that were previously requested by the terminated employee.