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1.0 Introduction

The Facility Administration and Maintenance Information System (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.

Please Ask Plenty of Questions!

When FAMIS 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 general introduction to the FAMIS software and navigation techniques. 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

You will access FAMIS by using your web browser. The FAMIS application is ‘invoked’ (started) by entering the URL: http://wwwd.fac.nodak.edu/forms90/f90servlet/?config=famis8i_dev in your web browser. A small ‘plug in’ program will download automatically the first time you invoke FAMIS on a given workstation. Your FAMIS administrator can help you with this, if necessary. Once FAMIS has been invoked, a User Logon form (refer to Figure below) will be displayed. This form represents the first level of security for protecting your FAMIS data. FAMIS cannot be accessed without a valid username and password. During training you will be logging onto FAMIS as a student. The username and password for you to use will be displayed on the front of your monitor. During training we will be using sample data rather than the production data you will be using when you ‘go live’ (implement) FAMIS.

Your FAMIS Administrator will provide you with a username and password for accessing FAMIS from your own work location. Please protect your logon information and always logon as yourself.
TIP:  Add this web page to your browser favorites. Alternatively, you can create an icon on your Windows desktop. Further instructions regarding this will be provided upon request.

Accessing FAMIS

To access FAMIS, you need to 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.
Congratulations!
If you have accessed the FAMIS Navigator (as shown below), you have successfully logged onto FAMIS.
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:

List of Values: EDIT>LIST VALUES
F9
Down Arrow Box Next to Field (where available)

Save or Commit: (Diskette)
FILE>SAVE/COMMIT
F10

Print Screen: (Printer)
FILE>SCREEN/PRINT
SHIFT + F8

Display Error: SHIFT + F1

Display Function Keys: HELP>KEYBOARD

Notes: (Notepad)
ATTACHMENTS>ATTACHMENTS

QUERY Functions:

Enter Query Mode: (Magnifying glass with yellow question mark)
QUERY>ENTER QUERY
F7

Repeat Query: + (Yellow Question Mark - twice)
QUERY>LAST CRITERIA
F7 + F7

Execute Query: (Magnifying glass with green traffic light)
QUERY>EXECUTE QUERY
F8

Count Query (Hits): (Magnifying Glass with Summation Sign)
QUERY>COUNT HITS  
SHIFT + F2

Cancel Query:  

QUERY>CANCEL

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:  

RECORD>INSERT  
F6

Duplicate Record:  

RECORD>Duplicate  
F4

Delete Record:  

RECORD>DELETE  
SHIFT + F6

Clear Record:  

RECORD>CLEAR  
SHIFT + F4

Clear Block:  

EDIT>CLEAR BLOCK  
SHIFT + F5

Clear Field:  

EDIT>CLEAR FIELD  
CTRL + U

Field Level (Form) NAVIGATION Functions:

Advance 1 Field:  

TAB

Back 1 Field:  

SHIFT + TAB

Next Primary Key:  

SHIFT + TAB

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  
SHIFT + UP

Next Record:  

(Right Arrow)  
RECORD>NEXT  
SHIFT + DOWN

Last Record:  

(Right Arrow with right barrier)  
RECORD-LAST

Field Level Editing – CUT/COPY/PASTE Functions:

Cut:  

(Scissors)  
EDIT>CUT  
CTRL + X

Copy:  

(Double Page)  
EDIT>COPY  
CTRL + C

Paste:  

(Clipboard)  
EDIT>PASTE  
CTRL + V

Edit Field:  

EDIT>EDIT FIELD  
CTRL + E

Mouse Menu Functions:  

Mouse Menus have been added to key fields that enable a user to quickly launch a related form or feature.

For example:

Right Mouse Click on Work Order Number:  

Launches the following forms & feature:

- 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
- << Previous Year
- < Previous Month
- > Next Month
- >> Next Year

**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 03 will result in January 15, 2003
- 1-15 will result in January 15 of the current year

**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.
2.0 Labor/Personnel

EXERCISE 1 – 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.

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.
EXERCISE 2 – 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.

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 3 – 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:

![FAMIS Report Parameter Form - Figure 5.](image)

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.
• 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-YYY” (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.
EXERCISE 4 – EMPLOYEE FORM

In this exercise you will learn how to find and maintain employee information using the FAMIS Employee form.

Step 1: Access the Employee Form

- Access the Employee form.

![FAMIS Employee Form - Figure 6.](image)

Step 2: Query an Employee Record

- Utilizing one of the query techniques you have already learned, query your own employee record.

- Your employee record should now be displayed. If not, ask your instructor for assistance.
Step 3: View/Update Employee Information

NOTE: Employee records will be populated by a Human Resources interface. However, specific fields such as Crew, Supervisor, Charge Rate, etc. will be manually updated within FAMIS. Personnel Information Form:

<table>
<thead>
<tr>
<th>North Dakota University System</th>
</tr>
</thead>
<tbody>
<tr>
<td>Facilities Management System</td>
</tr>
<tr>
<td>Personnel Information Form</td>
</tr>
</tbody>
</table>

**SITE:** ________  **Employee Name:** ____________________  **PS Empl ID:** __________

**ACTION:**
- New Hire: ___  Date: ________  Position Transfer: ___  Date: ________
- Terminate: ___  Date: ________  Description: __________________________

**FAMIS INFORMATION:**
- Office Phone #: ________________  Cell Phone: ________________
- Pager: ________________  Uniforms Issued: ___  Returned: ___
- Keys Issued: ___  Returned: ___  Certification: __________________________
- ID Badge: ___  Returned: ___  Job Title: __________________________
- Crew/Craft: ____________________  Send Acct w/record? Yes ___  No ___
- Work Schedule: ____________________  Purchase Limit: __________
- Position Number: ________________  Is employee a Buyer? ________________
- Charge Rate: ____________________
- Does employee receive e-mail with file notification regarding interfaces? Please check if applicable: AP ___  AR ___  PAYROLL ___  GL ___

**FACILITIES PAYROLL USE ONLY**
- Oracle ID ____________________
- Role(s) Assigned: ____________________
- Date Role Added: ____________________  Date Role Removed: ____________________
- Facilities Employee updating record in FAMIS ____________________

Director Approval: ____________________  Date: ____________________
• Work Description
  • Job Title
  • Supervisor – Determines who will do labor and requisition approvals.
  • The Crew that is associated with an individual employee may possibly limit the work orders that the employee may charge to. This is determined in System Configuration.
  • Resource Calendar – this is used to specify the work schedule (the number of hours per work day) an individual employee normally works.
  • Approval Limit – this represents the Maximum allowable charge an individual employee can submit and/or approve for a Purchase Requisition or PO Change Order.

• General Information.
  NOTE: If any value is entered in the Terminated field, the Employee record will be considered INACTIVE by FAMIS.

• Payroll Information.
  • The FAMIS system will apply the Charge Rate, plus any applicable markup, when labor records are being processed against a work order.
  • This rate will be charged to the Billing Account for work orders with a Billing Method of “ACTUALS”.
  • The HR interface from PeopleSoft will populate Payroll Number with the Employee’s Position Number and Record No. with the Employee’s Record Number.

• Press System tab.
  • Employee’s Oracle ID – This will tie this Employee to transactions based on their log in.
  • Employee’s Default Site.
  • Employee’s Default Warehouse.
  • Authorized Warehouses – This will grant the individual employee access to the specified Warehouses.

• Press Personal tab
  • The Labor tab will display all time that has been charged for this Employee. (Labor cannot be entered on this form.

• Press Attributes tab
  • An appropriate Business Unit ID must be entered for every employee.
  • The Notification Attributes are used for custom interfaces to PeopleSoft and should only be populated by the FAMIS Administrator.
  • The “Send Account w/req?” field indicates that the work order accounts are to be sent to PeopleSoft with Payroll records for this employee, and should only be used if instructed by your Campus Business Manager.
  • Complete other Attribute fields as appropriate.
• Commit the changes you have made.
• Close the Employee form.
DEMONSTRATION – PAYCODE CONFIGURATION FORM

In this exercise you will learn how to find and maintain employee information using the FAMIS Employee form.

Step 1: Access the Pay Codes Configuration Form

The Pay Codes window (accessed by the Pay Codes button of the Personnel Configuration form) is used to establish pay codes. Pay codes are used in labor entries and affect the labor charged to a work order. Setting up pay codes includes defining factors used to calculate labor charges. The base rate factor is a multiplier that is applied to the charge rate. You can also specify a flat rate that is added to the hourly rate of pay. Base rate factors and hourly add-on rates are defined separately for Recharge labor (the rate charged to the work order) and Payroll.

The selected pay code will apply to an employee's labor charges unless you have defined crew overrides for the pay code. A crew override is used when the employee belongs to a crew for which override charge rates have been defined.

NOTE: The first 3 characters of each Pay Code will be sent to PeopleSoft as the Earnings Code for payroll purposes.

- Access the Pay Codes Configuration form by pressing the Pay Codes button.

FAMIS Pay Codes Configuration Form - Figure 7.
- Recharge Columns (*Base Rate Factor & Hourly Add-on Rate*) – These columns are used, along with the *Charge Rate* from the individual *Employee* records to calculate the labor costs which are applied to *Work Orders*.

- Payroll Columns (*Base Rate Factor & Hourly Add-on Rate*) – These columns will not be used except for calculating *Comp Time* hours earned.

- Default – checkbox used to define the pay code that you wish to appear as the default on all forms that support labor charges entry, unless otherwise overwritten by referencing *Standing Work Orders (SWO’s)* with a different *Pay Code* applied.

- Override – checkbox used to indicate if values have been applied that will override the original pay code values when the employee for whom labor charges are being applied belongs to a particular crew. Override values have not been applied at this time.

- Close the *Pay Codes Configuration* form.

- Close the *Personnel Configuration* form.
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 8.](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 9.

The following records within FAMIS are potentially effected when an employee in 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.