Course Manual
for

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

QUERY Functions:

| Enter Query Mode (Magnifying Glass with Yellow Question Mark) | QUERY->ENTER QUERY | F7 |
| Repeat Query (Magnifying Glass with Yellow Question Mark- twice) | QUERY->LAST CRITERIA | F7>F7 |
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 \( \rightarrow \) (Left Arrow with Left Barrier)
RECORD>FIRST

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

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

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

Field Level Editing - CUT/COPY/PASTE Functions:

Cut \( \overset{\frown}{\frown} \) (Scissors)
EDIT>CUT

Copy \( \overset{\frown}{\frown} \) (Two Pages)
EDIT>COPY

Paste \( \overset{\frown}{\frown} \) (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:

![Image of FIND Type List of Values for Maintenance Types]

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.](image)

- 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](image) (Enter Query) Icon to enter Query mode.
- Navigate to the *Description* Field and enter `%WINDOW%`.
- Execute the Query by using the ![Execute Query](image) (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. ~,!@#$%^&*) 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.

- 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 Service Requests

EXERCISE 5 - ENTER REQUESTOR INFORMATION

In this exercise you will learn how to enter a new requestor in FAMIS. Requestors will be anyone who requests work in FAMIS, whether by phone, email, or FAMIS Self Service.

Step 1: Access the Requestor Form

- It is important that Requestor information is not duplicated in FAMIS. To help prevent this from occurring, first check to see if the individual exists with a different spelling.
- Access the Requestor List Form from the FAMIS Navigator
- Enter Query Mode.
- Use the query wildcards to search for the your last name, as shown in the figure below:

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

Step 2: Create Requestor Record

- If the individual does not currently exist, cancel the query using the Cancel Query button on the toolbar.
NOTE: If this Requestor is going to be a FAMIS Self Service customer (Web Requestor), do not create a Requestor record through this form. Contact your FAMIS Administrator.

- Enter the following Requestor information
  - Notify – Must be checked for anyone who will receive automated emails.
  - The Key Requestor and Key Holder columns will not be used at this time.
  - Name - Use Lastname, Firstname as the format
  - Department
  - Telephone
  - Fax Number (Optional)
  - Email Address – Must be populated for Notification Profile functions (automatically generated emails)
EXERCISE 6 – CREATE NOTIFICATION PROFILE

In this exercise you will learn how to setup a Notification Profile describing the logic FAMIS will use to determine when and to whom emails are sent automatically.

Step 1: Access the Notification Profile Form

- Access the Notification Profile form using the FAMIS Navigator

Step 2: Find Requestors

- Select the Requestors radio button
- Press the Find button
- All Requestors that have been created with the “Notify” option will be displayed, as shown below:

![FAMIS Notification Profile Form – Figure 11.](Image)

Step 3: Configure Notification Profile

- Select one or more Requestors using the Pick checkboxes in the left-hand column, the Select All button, and the Clear All button as appropriate
• Select the *Single Change* or *Mass Change* button as appropriate. The following form will be displayed:

![FAMIS Notification Profile Change Form – Figure 12.](image)

**FAMIS Notification Profile Change Form – Figure 12.**

• Mark the checkbox and select the appropriate Email Template for the following lines:
  - Work Order Creation / SR
  - Work Order Closing / SR
  - Project / Creation
  - Project / Closing
• Press *OK* to close the *Single or Mass Change Form*
• Close the *Notification Profile Form*
EXERCISE 7 - ENTER A NEW SERVICE REQUEST

In this exercise you will learn how to enter a new request for work, how to navigate within the Service Request form and change a Service Request.

Step 1: Access the Service Request Form

The creation of a Service Request is the first step in creating a work order.

- Access the Service Request Form using the FAMIS Navigator.

FAMIS Service Request Form – Figure 13.

- When you access the Service Request Form you are in data entry mode. You are ready to enter a new request for work.
- Required fields (fields that must be completed before a new Service Request record will be created) are highlighted in yellow.
- The Service Request Form has buttons on the right margin to access other forms related to the Service Request.
Step 2: Enter a New Service Request Requiring Review

- Tab out of the SR Number Field. (FAMIS will automatically assign the SR Number when the record is saved.)
- Enter the Description (to the right of SR Number) of the problem or the work to be performed. There are 64 character spaces available.
- Leave Parent Work Order blank for this exercise.
- Capital Project, if applicable. (Skip Parent Work Order for this Exercise.)
- Enter the Requester information.
  - Retrieve Requestor information from the Requestor Table by typing the first few letters of the Requestor’s last name in the Requestor Field and pressing the F9 key (or pressing the List of Values Button to the right of the field). FAMIS will display a list of Requestors that match the search criteria you entered. Select one of the names displayed and press the OK Button or press Cancel to return to the Service Request Form and enter a new Requestor. The following guidelines should be used when entering new Requestor records:
    - Requestor Names should be entered using the format “Last Name, Full/Formal First Name”.
    - The Requestor’s telephone number should be entered using their full campus phone number.
  - Press the Requestor Button to the left of the Requestor Field to enter the following information:
    - Department (use the List of Values if needed)
    - E-Mail Address

  TIP: Please note that if this requestor is to receive automated notifications, their Notification Profile will need to be configured before such emails will be generated.
  - The same steps can be followed to add Alternate Requestor information.
- Request Date - System defaults to current date and time.
  - You may overwrite the current date and time, if appropriate.
- Enter the Location Information
  - Site will default. You can change the default, if needed. (Use the List of Values, if needed.)
  - Enter the Building (Use the List of Values, if needed.)

  TIP: Enter any portion of the Building Name and press the Tab key
to see a filtered list of buildings containing the string you typed.

- Enter the Floor (Use the List of Values, if needed.)
- Enter the Room (Use the List of Values, if needed.)

- General Information
  - Enter Non-Available Time (200 characters of text can be entered.)
  - Maintenance Type (Use the List of Values, if needed.)
  - Priority - affects the due date of the work. (Use the List of Values, if needed.)
  - Status. Enter the status as REVIEW for this exercise. (Use the List of Values, if needed.)

  NOTE: Committing the SR with a status of SCHEDULED will create a Work Order. This should be used for all maintenance requests that will be turned into a Work Order immediately. Requests that need to be reviewed or held for some reason will be entered with a status of REVIEW. All requests entered through the customer web site application are given a status of REQUESTED.

  - Enter Equipment ID – will not be used at this time.
  - Enter Crew (or PRIMARY shop) responsible for completing the work.

    For this Exercise, enter your Crew. (Use the List of Values, if needed.)

  - Assigned To. The Employee performing the work.

    For this Exercise, enter your Employee Name. (Use the List of Values, if needed.)

- Print Ticket – A check mark indicates that the work order will print during the next batch processing. The check mark is removed after printing (system or manual).

**Step 3: Specify the Billing Information for the Work**

Billing account information MAY default based on the maintenance type you selected in the previous exercise; however, all portions of the account string may not be populated. You may receive a message indicating “You have not entered all required account segments for the billing.” If no default account information is provided, based on the Maintenance Type, you will be prompted to enter all segments of the billing account.

- Access the Billing information by pressing the Billing Button. The Billing Form will open, as shown in the figure below:
Billing Types are configured by the FAMIS Administrator and are used to indicate which type of costs (labor, material, invoices, etc.), if any, will be billed through the Job Costing process. The billing type also determines the amount of markup that will be applied to each type of cost, if appropriate.

- You can select a Billing Type from the List of Values if no value is displayed or change the Billing Type that has been populated based on the Maintenance Type you selected on the previous form.

- Accounting Hold – Selecting the Accounting Hold checkbox on the Billing form will prevent any charges for this Request to be picked up by the FAMIS Job Costing processes. If a request is placed on Accounting Hold, the user can provide a reason for the hold.

- Account(s) – FAMIS provides the ability to charge work requests to more than one account, with the requirement that the total percentage entered must equal 100%.

  - Access the Account Details Form by pressing the Account button over the Account column. The Account Details form will open and display default account information, as shown in the figure below:
Step 4: Work Plan

Identify Primary Work Plan Assignments

- Access the Work Plan Window by pressing the Work Plan Button on the right side of the Service Request Form.
- Start Date – The system defaults to the current date. *(You may overwrite the start date, if appropriate.)*
- Due Date – Generated by FAMIS, based upon the date the SR is entered and the Priority selected. *(You may overwrite the due date, if appropriate.)*
- Method – Enter if appropriate, according to campus guidelines. *(Use the List of Values if needed.)*
- Outage Class – *Will not be used.*
- Crew – Automatically filled in from the Main Tab of the Service Request Form.
- Craft – The Enter if appropriate, according to campus guidelines. *(Use the List of Values, if needed.)*
- Task List – Use this space for additional text describing work to be performed, if necessary.

**NOTE:** Requests received via the Web application will have customer-provided information in the Task List field.
Supporting Labor Information (Secondary Labor Crews):

Supporting Labor is used to indicate additional crews that will work on a specific Work Order. Use Supporting Labor when there is a “Lead Crew” responsible for the overall completion of the work. In other cases, Parent/Child Work Orders will be used as discussed later.

- Select the Supporting Labor Tab of the Work Plan Window. The Supporting Labor Form will open, as shown in the figure below:

FAMIS Service Request Supporting Labor Form – Figure 16.

- Enter the first Secondary Crew.
- Enter Craft (optional).
- Enter Size (number of Crew members requested).
- Enter total estimated hours for Crew (optional).
- Enter status (Use the List of Values, if needed).
- Repeat for each Secondary Crew.

- Close the Work Plan Window.

What is your SR Number? _______________________

Step 5: Create a Second Service Request

- Press the Insert Record Button on the Toolbar (Page with a Green Plus Sign).
- Enter a new Service Request using the techniques you have just learned.
- Enter “REQUESTED” in the Status Field.
- Press the SAVE/COMMIT Icon on the Toolbar (Brown Diskette)
Step 6: Checking for Duplicate Service Requests

The Check Dups Button at the right of the Service Request Form allows you to screen for other Service Requests which have been submitted recently AND which match one or more criteria that you define. When a new Service Request is suspected to be a duplicate, the Check Dups function must be used BEFORE assigning a SCHEDULED status to the Work Order. If it is determined that the request is a Duplicate, the request will be canceled.

- Click on the Check Dups Button.
- Specify the number of days you wish checked.
- Select the fields you wish to compare to the current Service Request.

  NOTE: The Check for Duplicates function will ONLY search for other Service Requests matching criteria which have already been entered on the Service Request form from which the Check Dups button was pressed.

- Click OK.
- A new window will be opened displaying all requests meeting the specified criteria.
- If you select Check for Duplicates Automatically, you will be alerted every time you enter a new Service Request matching the specified criteria, for the CURRENT SESSION ONLY.

Step 7: Create and Schedule a New Service Request for Routine Work

- Press the Insert Record Icon on the Toolbar (Page with a Green Plus Sign).
- Enter a new Service Request using the techniques you have just learned.
- Enter “SCHEDULED” in the Status Field.
- Press the SAVE/COMMIT Icon on the Toolbar (Brown Diskette)

What is your SR Number? ______________

- Press the Other Tab.

What is your Work Order Number? ______________

- Note the Work Order Status.

  (If you do not have a Work Order number, ask your instructor for assistance.)
- Close the Service Request Form.
EXERCISE 8 – QUERY A SERVICE REQUEST

In this exercise you will learn how to find an existing request for work, how to navigate within the Service Request form and change a Service Request.

Step 1: Access the Service Request Form

• Use the Navigator menu or press the QuickPick button created earlier.

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.

• Enter the Service Request Number you wrote down in the previous exercise in the SR Number field.

• 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: For a complete listing of query functions and navigation tools, refer to the earlier section on the FAMIS Navigation Tools.

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.

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 Nomenclatures that contain the word VALVE by using ‘%VALVE%’ 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).

**Query Tips**

Function keys or Menu Bar functions can be used to perform queries instead of accessing the tool bar.

- **F7** performs the same function as QUERY>ENTER QUERY on the Menu Bar which we have performed using the (Magnifying Glass with Yellow Question Mark)

- **F8** performs the same function as QUERY>EXECUTE QUERY on the Menu Bar which we have performed using the (Green Traffic Light).

- **QUERY>CANCEL** on the Menu Bar or (Red Traffic Light) are the only two ways to cancel a Query
EXERCISE 9 – SERVICE REQUEST WORKBENCH

In this Exercise you will learn how to access and utilize the Service Request Workbench and create/edit private views for the Service Request Workbench. The primary use of the Workbench will be to review requests entered through the FAMIS Self Service application (Web) and to review Service Requests, which have been held for REVIEW.

Step 1: Access the Service Request Workbench Form

- Access the Service Request Workbench by using the FAMIS Navigator.

![FAMIS Service Request Workbench Form – Figure 17.](image)

Step 2: Using Public and Private Views for the Service Request Workbench

A workbench view is a way to view selected records sorted in a specific order with columns of information displayed in a selected order. A public view is one that has been created by the FAMIS Administrator for all users. A private view is one that has been created by a user and is only available to that user’s login. Selecting a different view for a workbench changes the list of records that are displayed according to the criteria specified when the view was created.

- The “All Active Service Requests” view is a public view.
- Use the drop-down arrow to the right of the Folder field to select a different view.
- Notice the list of Service Requests that are now displayed.
• You can create a **private view** on the *Service Request Workbench* to display only those Service Requests you wish to see.

  *For this Exercise, create a view for Service Requests for a specific Building.*

• Press the *Edit* Button. (The Edit Folder Window should now be displayed.)

  ![FAMIS Workbench View Edit Folder Form – Figure 18.](image)

  **FAMIS Workbench View Edit Folder Form – Figure 18.**

  • **Display Tab:**
    - Duplicate Button
      - **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, such as “Service Requests for Building 001”).
      - Press the OK Button.
    - Primary Sort – You may select first/primary column to be used for sorting the Service Requests results.
    - Secondary Sort – You may select the second column to be used for sorting the Service Requests results.
    - Sort Order – Ascending/Descending
    - Private – Checked if the View is considered a Private View. (Users may only create and edit private views unless the Administrator has granted privileges to allow the user to create, edit and delete public views.)
    - Save Changes – Checked when created/editing a Private View.
    - Delete – Users may only delete Private Views.
- 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.

![FAMIS Edit Folder Filter Tab Form – Figure 19.](image)

- **Filter Tab:**
  - Crew – You may select all *Crews* or a specific Crew.
  - Craft – You may select all *Crafts* or a specific Craft.
  - Site – You may select all *Sites* or a specific Site.
  - Maintenance Type – You may select all *Maintenance Types* or a specific *Maintenance Type*.
  - Requestor – You may select all *Requestors* or a specific *Requestor*.
  - Maximum Priority – You select the *Maximum Priority* number (Highest Integer) to returned in the *Service Request* results or select all.
  - Status – You may select all *Active Statuses* or a specific *Status*.
  - Assigned To – You may select *Service Requests* that are assigned to all Employees or that are assigned to a specific Employee.
  - Building – You may select all Buildings or a specific Building.
    
    *For this Exercise, use the drop-down list to select the Building you specified in the View title.*
  - Advanced Filter – You may use SQL logic to specify results that are not available from the above Filter Options (e.g., Service Requests more than five days old).
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 Service Request Workbench.

- Press the OK Button to exit the Edit Folder Window.

- Close the Service Request Workbench by pressing the Close Form Button.

  **TIP:** You can create private views for most FAMIS Workbenches using these same techniques.

Step 3: Select and Modify a Service Request

- Using the horizontal and vertical Scroll Bars, find the first Service Request that you created.

- Select the record and open/view the Service Request by pressing the View Button or double-clicking your mouse on the record you wish to view.

- The Service Request you selected will now be displayed in the Service Request Form as shown in the figure below:

  ![FAMIS Service Request Form – Figure 20.](image)

  - Review Type, Priority, and Status. Update if necessary.

  - Review Billing Information and update if necessary.
Step 4: Send an E-Mail to the Requestor

When a Service Request is Canceled or Rejected, Work Control will notify the Requestor using the FAMIS E-Mail functions described below:

- 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 21.

- Navigate to the Mail Tab of the Attachments Form. (We will discuss the Options Tab in a later exercise.) The Mail Form will open, as shown in the figure below:

FAMIS Attachments Mail Tab Form – Figure 22.
• Press the New Button to create a new Mail Message.
• The New Mail Message Form will open, as shown in the figure below:

**FAMIS New Mail Message Form – Figure 23.**

• There are two methods for creating a mail message associated with a Service Request or Work Order. You can create the message manually, providing the title and text of your message manually, or you can use a pre-defined mail template.

• To select a pre-defined mail template, use the drop-down arrow to the right of the Template field to view and select the appropriate template. If a template will not be used, navigate to the Recipient (To) field.

• Enter an e-mail address in the To field or press the List of Values Button to open the Recipients Search form, as shown below:
FAMIS Mail Recipients Form – Figure 24.

- If an e-mail address has been associated with the Requestor, the Requestor’s name will be displayed, as shown above. Alternate Requestor and Building Manager information will also be displayed, when applicable.

- Highlight the Requestor name in the left column and press the To --> button. FAMIS will copy the Requestor’s e-mail address to the appropriate field.

- If no names are displayed or you wish to include other recipients on the message, the buttons to the right of the form can be used to display a List of Requestors or Employees with valid e-mail addresses, as shown below:
FAMIS Requestors E-Mail List Form – Figure 25.

- Select from the list displayed and press the OK Button.
- The same techniques can be used to send a copy or blind-copy of the message to additional recipients.
- When you have finished identifying the mail recipients, press the OK Button to return to the New Mail Message Form.
- Navigate to the Subject line and enter a Subject for your message.
  
  **NOTE:** This information is populated automatically by FAMIS when a mail template is used.

- Enter the text of your message and press the Send Button to send your message.
- Messages sent using the FAMIS Mail Function are stored permanently in FAMIS and can be viewed at a later date from the Mail Tab of the Attachments Form
- 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 5: Create a New Service Request

- Press the New Button at the bottom of the Service Request Workbench.
- Enter a new Service Request using the techniques learned earlier. Enter the request with a status of REQUESTED.
- Close the Service Request Form.
- Refresh your Service Request Workbench view (press F8 or the Execute Query button).

Step 6: Assign/Schedule a Service Request

- Highlight the Service Request you just created, to Assign and/or Schedule.
- Press the Assign/Schedule button at the bottom of the Service Request Workbench.
- The Assign Work Order Window will now be displayed as shown in the next Figure.
FAMIS Assign/Schedule Work Order Window – Figure 27.

- Assign the Service Request as appropriate. *(Use List of Values, if needed.)*
- Change the Status of the Service Request to SCHEDULED. *(Use List of Values, if needed.)*

**NOTE:** Did you notice that the Service Request no longer appears on your Workbench? Ask your instructor why.

- Close the Service Request Workbench.

Questions ???
3.0 Work Orders

**EXERCISE 10 – 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 28.*

- 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:

![FAMIS Work Order Print Form – Figure 29.](image)

FAMIS Work Order Print Form – Figure 29.

- 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)
  o Complete Route – used to indicate FAMIS should print all information for a PM Route Work Order
  o Include Secondary Labor – used to indicate that FAMIS should print all information for all Secondary Crews indicated on a Work Order
  o 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.
  o 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 30.](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 31.](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 32.](image)

FAMIS New Note Form – Figure 32.

- 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.
**FAMIS Service Request Form with Attachment - Figure 33.**

**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 11 – 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 34.

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:

![Edit Folder Window](image)

FAMIS Edit Folder Form – Figure 35.

- 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
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- 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 36.

  - 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 37.

- Select Close from the menu.
- The Work Order Closing Form should be displayed, as shown below:
FAMIS Work Order Closing Form – Figure 38.

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 39.

- 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
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 40.](image)

- 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 12 – 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 41.

- 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:
  - Press the Request Button to the right of the Work Order Form.
  - Change the Requestor information as needed. *(Use the List of Values to query existing Requestors.)*
  - 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 13 – THE WORK ORDER CLOSING FORM

In this Exercise you will learn how to access the Work Order Closing form directly, and close work orders using the Work Order Number.

The Primary Crew on a Work Order will be responsible for indicating when the Work Order should be closed. The assigned technician will indicate to the supervisor that a Work Order is complete so that the Work Order can be “closed”. There may also be times where Work Control is asked to close the Work Order.

Step 1: Access the Work Order Closing Form

- Select the Work Order Closing Form from the FAMIS Navigator.

![FAMIS Work Order Closing Form – Figure 42.](image)

Step 2: Close the Work Order

- Work Order Status
  - Change Work Order Status to “CLOSED”.
  - The Equipment Number may be entered in the Equipment field of the
Work Order Closing Form during the Work Order closing process.

- Enter Equipment Up and Down time, if applicable.
- Performance Codes
  - Enter Condition, Cause and Action Codes, if applicable.  (Use List of Values if needed.)
- Documenting Work Performed

There are two ways to add notes to Work Orders at Work Order Closing:

**Task List**

- Click on the Task List Tab of the Work Order Closing Form.
- Add comments as necessary.

**Note Form**

- Access the Note Form using the Attachment button on the Toolbar or directly through the Menu Bar:
  ATTACHMENTS>ATTACHMENTS
- The Attachments Form should appear with the Options Tab selected.
- Select the Notes Tab.
- Notes previously added to the Work Order will be displayed.
- Press the New Button on the bottom of the form to create a New Note.
- Type in a Note Title as follows:
  Enter your initials and ‘WO CLOSING COMMENTS’ in the Note Title Field.
- Tab to the next field.
- Type in the information that needs to be documented for this Work Order.
- Print on Work Order Ticker – Check Print flag checkbox.  A Note flagged with Y for print will automatically print on the work order ticket for all work (PM, SR, or Project) that has the equipment number on the work order.
- Private - Retain the default value of N for the private flag.  A private Note (flagged as Y) can only be viewed by the person who entered it.
- 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.
- Press the OK button to save the Note entries and leave the editor.

- Close the Attachments Form.
• Readings
  o Access the Readings Window by Pressing the Readings Tab.
  o In the future, 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.
EXERCISE 14 – COMPLETING A CREW USING WORK ORDER CLOSING FORM

In this Exercise you will learn how to access and utilize the Work Order Closing form to indicate a specific crew has completed the work charged to that crew.

When multiple crews have been specified on a Work Order (as Secondary Labor crews), each Crew Supervisor will be responsible for indicating the work has been completed by their crew. In the case of Secondary Labor Crews, the Crew status will be changed rather than closing the work order.

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

- Access the Work Order Closing form.

**Step 2: Complete the Crew**

- Query the Work Order by number.
- Select the Crews Tab.
  - Secondary Labor Crews assigned to the Work Order will be displayed as shown in the figure below:

![FAMIS Work Order Closing Form – Crews Tab– Figure 43.](image-url)
o Tab to the Status column.
  o Change Status to “COMPLETE” for the appropriate Crew.

- Documenting Work Performed
  o Add notes as needed using the steps outlined in the previous Exercise.

- Close the Work Order Closing form.
**EXERCISE 15 – 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 44.](image)

**Step 2: Enter a New Standing Work Order**

- Tab out of the SWO Number field to let FAMIS assign a work order number, or manually enter a Standing Work Order Number according to Campus guidelines.
- Enter a Description for the Standing Work Order.
- Enter the Status OPEN.
• Enter the appropriate Maintenance Type.
• Enter an Employee in the Assigned To field only if the Standing Work Order is for a single employee.
• Enter Method if appropriate, per campus guidelines.
• Enter a Paycode only if directed by your campus personnel coordinator.
• Enter a Department if appropriate.
• Enter the appropriate Crew for this Standing Work Order.
• Enter Location information using the techniques you have learned.
• Enter Billing information using the techniques you have learned.
• *Location Allocation* button – may be used to associate multiple locations with this Standing Work Order. If multiple locations are used, the total percentage must equal 100.
• Close the Standing Work Order Form.
4.0 Materials

EXERCISE 16 – 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.

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 46.](image)

- 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 17 – 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 47.

- 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.'
- When the material is issued, the status will be 'ISSUED.'
- When the material has been staged, the status will be 'STAGED.'
- 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.
  - The WO Parts List button may be used to view any parts listed on the work order entered above.
  - 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.
  - 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 48.**

*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.

---

### FAMIS Issue Request Report

<table>
<thead>
<tr>
<th>WO Number</th>
<th>WO Date</th>
<th>Warehouse</th>
<th>WO Status</th>
<th>Requested By</th>
<th>Requestor</th>
<th>Issue Date</th>
<th>Issue Date</th>
<th>Issue Quantity</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>CENTRAL</td>
<td>AVAILABLE</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

---

**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.
5.0 Other Tools

**EXERCISE 18 – 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 49.](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.