



FAMIS Training Manual

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Overview of Service Request – Work Order Workflow in FAMIS

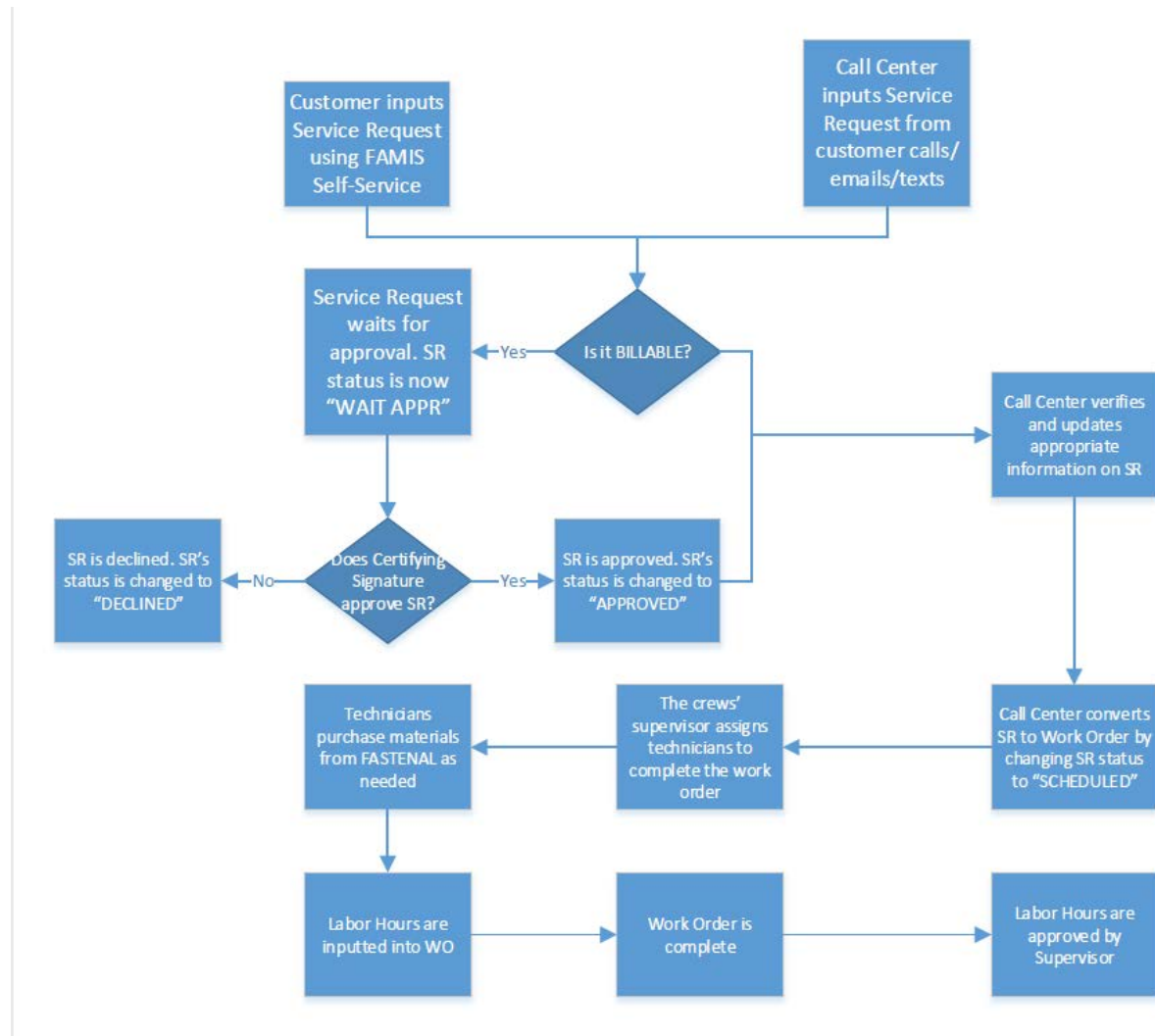
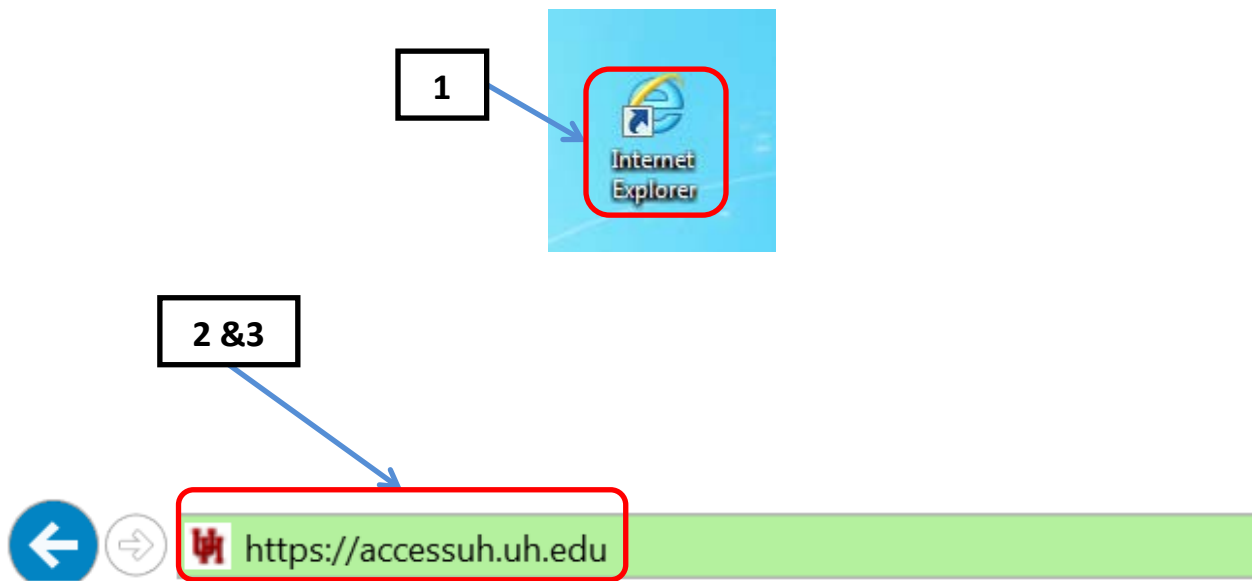


Figure 1 Work Order Workflow

Logging into FAMIS

Logging into FAMIS

1. Double Click on **Internet Explorer**
2. Click on the **address bar**
3. Enter **https://accessuh.uh.edu**
4. Press **Enter** to go to **AccessUH**
5. Log in using your CougarNet credentials.
6. Click on **FAMIS icon**
7. Click on the “Maintenance” tab



AccessUH

UNIVERSITY of HOUSTON PRINTING SERVICES
Contact: Crystal Doherty
713.743.5904
cdoherty@central.uh.edu

CougarNet Login myUH (PeopleSoft) Login

CougarNet ID: Don't know your CougarNet ID?
CougarNet Password: Change/Reset your CougarNet Password.

Login to AccessUH

5

University Services

Blackboard Learn 9 CASA Cougars Care COUGAR CARD Online Services CougarCard

6

FIX-IT Facility Request Self-Service **FAMIS Facility Work Order System** COURSE EVALUATION Faculty/Course Evaluation GET INVOLVED UH GET INVOLVED

7

famis an acadairis company

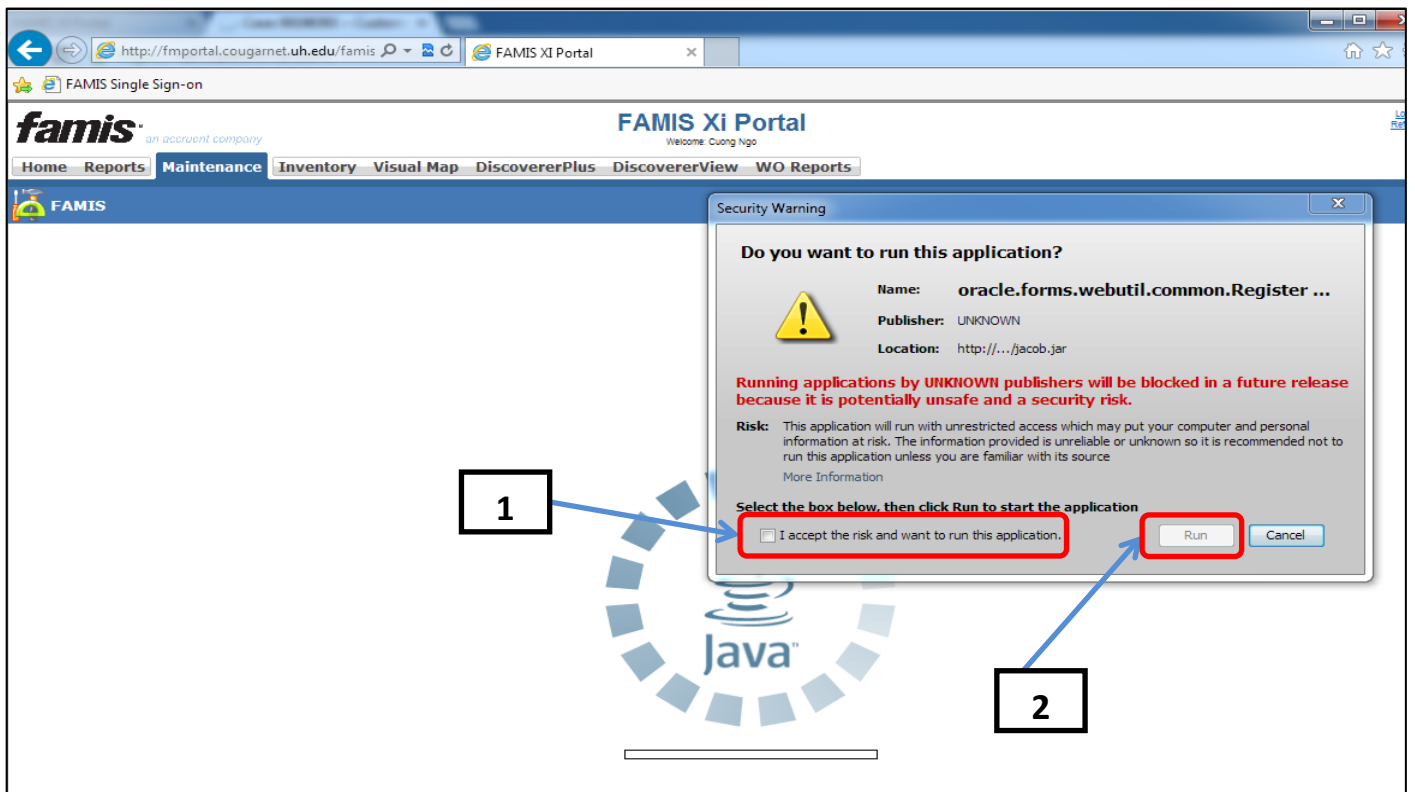
Home FSC Reports Portfolio Maintenance Inventory I

If there is a Security Warning pops up:

1. Check on **I accept the risk and want to run this application**
2. Click **Run** button
3. Do it again if it continues to ask. Depending on the specific configuration, Internet Explorer may ask to check this box up to 3 times.

If you have problem with getting FAMIS to display correctly, **please contact**

FAMIS Support at: famissup@central.uh.edu



Select a Tab

After successfully logging-in, there will be **TABS** located at the top of the window.

Depending on the user's role in FAMIS, you will have the specific tabs such as Maintenance, Key Control, Inventory, Reports, Visual Map, etc.

Click on one of the tabs to go to FAMIS Home Screen:

famis an account company **FAMIS Xi Portal** Welcome, Curro Nao [Logout](#) [Refresh](#)

[Home](#) [Reports](#) [Maintenance](#) [Inventory](#) [Visual Map](#) [DiscovererPlus](#) [DiscovererView](#) [WO Reports](#)

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Every day, more than 450 Plant Operations employees make their way to the University of Houston central campus, a "city" of 50,000 people, to work for you. In all, Plant Operations puts in over 18,000 hours of manpower each week supporting and maintaining a safe, beautiful, and functional campus environment .

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FAMIS Home Screen:

FAMIS Home Screen can be identified by “FAMIS Xi Home” right under the tabs

FAMIS Home Screen includes 3 main parts:

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

Quickpicks

FAMIS Xi Home

FAMIS Xi Home

Role selection

Menu My Documents

- WO Backlog
- Labor Approval
- Labor Charges
- Work Orders
- Work Order Closing

Shortcut buttons

Maintenance Mgmt Supervisor

- Equipment
- Facilities
- Invoices
- Job Costing
- Labor
- Materials
- Preventive Maintenance
- Projects
- Purchasing
- Schedules
- Service Requests
- Vendors
- Work Orders

Content Window

Type All Menu Items Go

Role Selection:

Depending on what type of user you are, you will see different roles such as Crew Technician, Project Manager, Maintenance Mgmt Supervisor, Warehouse Coordinator, Business Admin, etc.


If you are assigned more than one role in FAMIS, you will see different roles when clicking on the role selection. For each role you choose, the contents in the content window below will be changed.

The screenshot displays the FAMIS application interface with the 'Maintenance' tab selected. A role selection list is shown, containing the following roles: Space Management Admin, FSC, Inventory Control Admin, FAMIS Xi Administration, FAMIS Configuration (highlighted), FAMIS ADMINISTRATOR, Maintenance Mgmt Supervisor, and IT Support. Below this list is a tree view of menu items including Equipment, Facilities, Invoices, Job Costing, Labor, Materials, Purchasing, Schedules, Service Requests, Vendors, and Work Orders. A callout box labeled 'Different roles' points to the role selection list. The interface also features a 'Quickpicks' dropdown, several buttons (WO Backlog, Labor Approval, Labor Charges, Work Orders, Work Order Closing), and a 'Type' dropdown set to 'All Menu Items' with a 'Go' button.


Content Window:

Content Window includes 3 main parts:


Folder

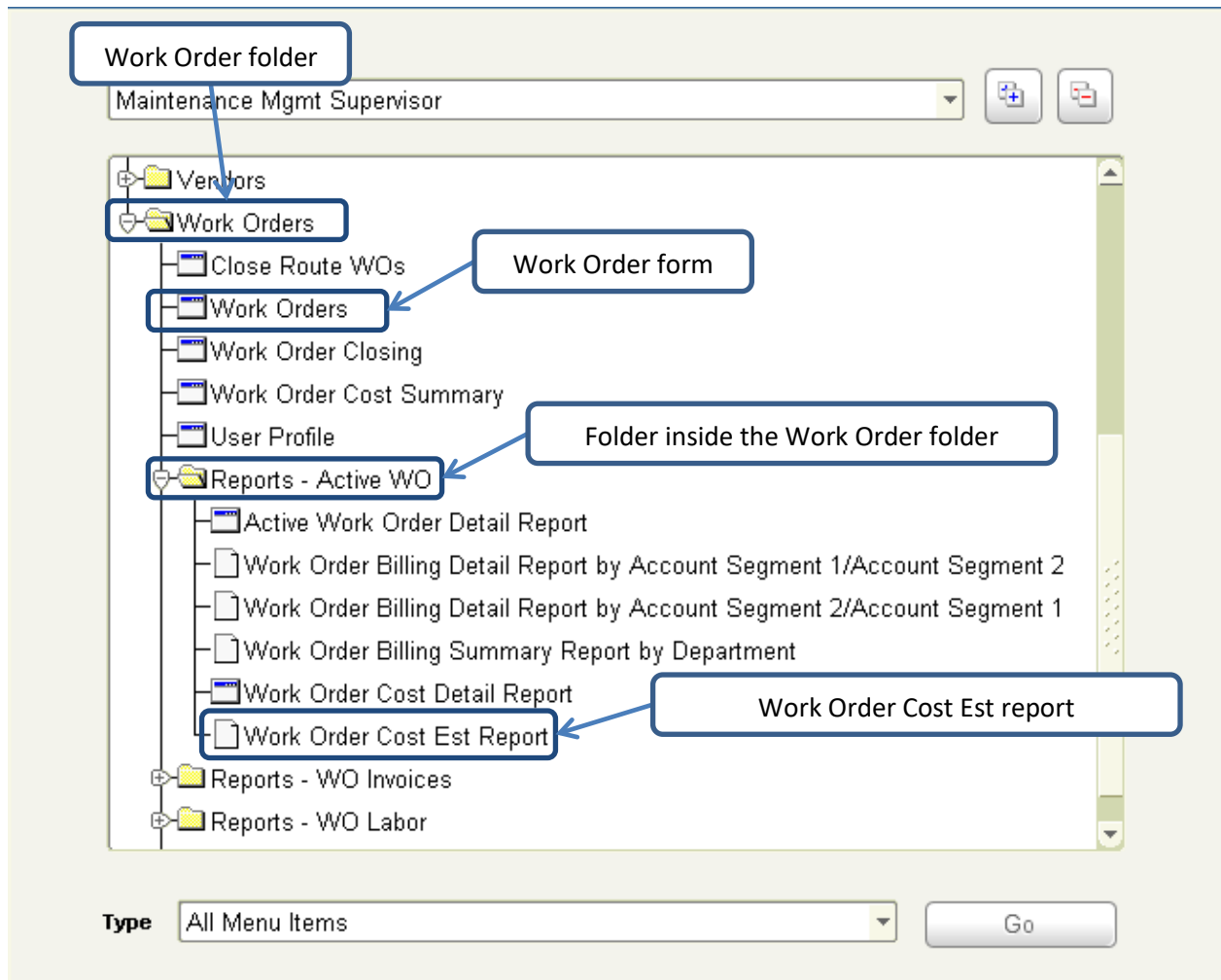
A folder's icon is represented by this symbol . Each folder can be expanded when you click on the "plus sign" on the left of the yellow icon. Each folder has forms and reports that relate to the folder name. For example, the Work Order folder will include Work Order form, Work Order reports, etc.

Forms

A form's icon is represented by this symbol . Each form serves a specific purpose and shows different information. For example, the Work Order form help users track and change WO information, task list, crew, job assignment, statuses, etc. Double click to the icon to open the form

Reports

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



Shortcut buttons

Depending on the user's role, the shortcut buttons will appear on the left side. For example, Maintenance Mgmt Supervisor will have shortcut buttons to WO Backlog, Labor Approval, Labor Charges, Work Orders, Work Order Closing, etc. Shortcut buttons help user quickly go to the forms and reports instead of finding them in the content window.

Click on a button to go to that form.

The screenshot displays the FAMIS Xi Home interface. At the top, there is a navigation bar with tabs for Dashboard, Home, FSC, Reports, Maintenance, Inventory, Inventory Report, Visual Map, DiscovererPlus, and Disc. Below this is the FAMIS logo and the text 'FAMIS Xi Home'. A 'Quickpicks' dropdown menu is visible, with a callout box labeled 'Shortcut buttons' pointing to a vertical list of buttons: 'WO Backlog', 'Labor Approval', 'Labor Charges', 'Work Orders', and 'Work Order Closing'. To the right, the 'Menu' tab is active, showing a tree view of menu items for the role 'Maintenance Mgmt Supervisor'. The tree includes folders for Equipment, Facilities, Invoices, Job Costing, Labor, Materials, Preventive Maintenance, Projects, Purchasing, Schedules, Service Requests, Vendors, and Work Orders. At the bottom, there is a 'Type' dropdown set to 'All Menu Items' and a 'Go' button.

Form navigation

Open a form

You can open a form by either clicking on a Shortcut button or by double clicking on a form in the content window:

The screenshot displays the 'FAMIS Xi Home' interface. On the left, a 'Quickpicks' sidebar contains buttons for 'WO Backlog', 'Labor Approval', 'Labor Charges', and 'Work Orders'. A blue callout box with an arrow points to these buttons, containing the text 'Click on these shortcut buttons'. The main content area shows a tree view under the 'Menu' tab. The tree is expanded to 'Work Orders', where the 'Work Orders' form is highlighted in blue. A second blue callout box with an arrow points to this highlighted item, containing the text 'Or double click on the forms here'. At the top of the main area, there is a dropdown menu set to 'Maintenance Mgmt Supervisor' and a 'Go' button at the bottom right.

Navigation Bar functions

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

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

Basic Search

Performing search (or query) is one of the most important skills in FAMIS. The search function in FAMIS is used to retrieve information from the database.

Where and when can you perform a search?

Search is used to get the information that exists in the system. You can perform a search in forms only. For each employee in a crew, it is important that you are able to search in Work Order Backlog (Work Order Workbench), Work Order, Purchase Requisition, Service Request, Labor Timecard, etc.

Basic Search function includes 3 main steps:


1. **Start the search function**
2. **Enter your requests / criteria**
3. **Execute search / query**
4. **Go to the next result**

Examples of basic search are listed in the table below:

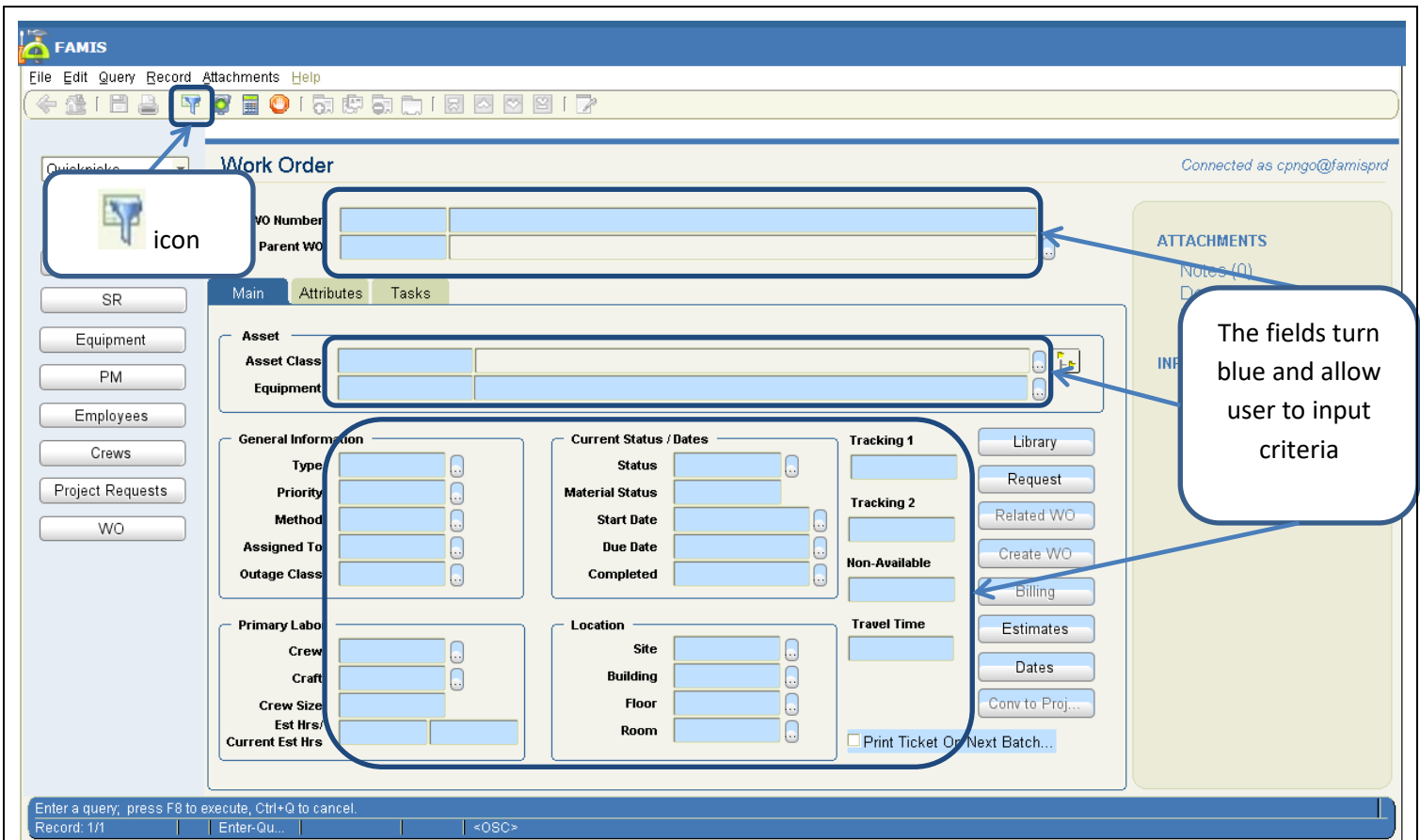
You give criteria	You get
Work Order Number (e.g., WO123456, WO290830)	Work Order detail information, cost information
<ul style="list-style-type: none">• Your peoplesoftID = 1234567• Start date = MON APR 28, 2014	All work orders assigned to employee that have peoplesoftID = 1234567 and the start date is MON APR 28, 2014
<ul style="list-style-type: none">• Crew name = HVAC• Building = 0585• Status = OPEN	All work orders that are assigned to HVAC, have the status of OPEN, and locates at that Building 0585

Start the search function:

There are two ways to start a search:

1. Click on the  icon in the navigation bar
2. Press **F7** on the keyboard

The fields in form will **turn blue** after starting a search (when the fields are not in blue, you cannot perform any search):



Enter your criteria

Work Order

WO Number **WO123456**

Parent WO

Asset
Asset Class
Equipment

General Information
Type
Priority
Method
Assigned To **1032334**
Outage Class

Current Status / Dates
Status
Material Status
Start Date **MON APR 28, 2014**
Due Date
Completed

Location
Site **00730**
Building **0585**
Floor **01**
Room **119**


Library
Request
Related WO
Create WO
Billing
Estimates
Dates
Conv to Proj...

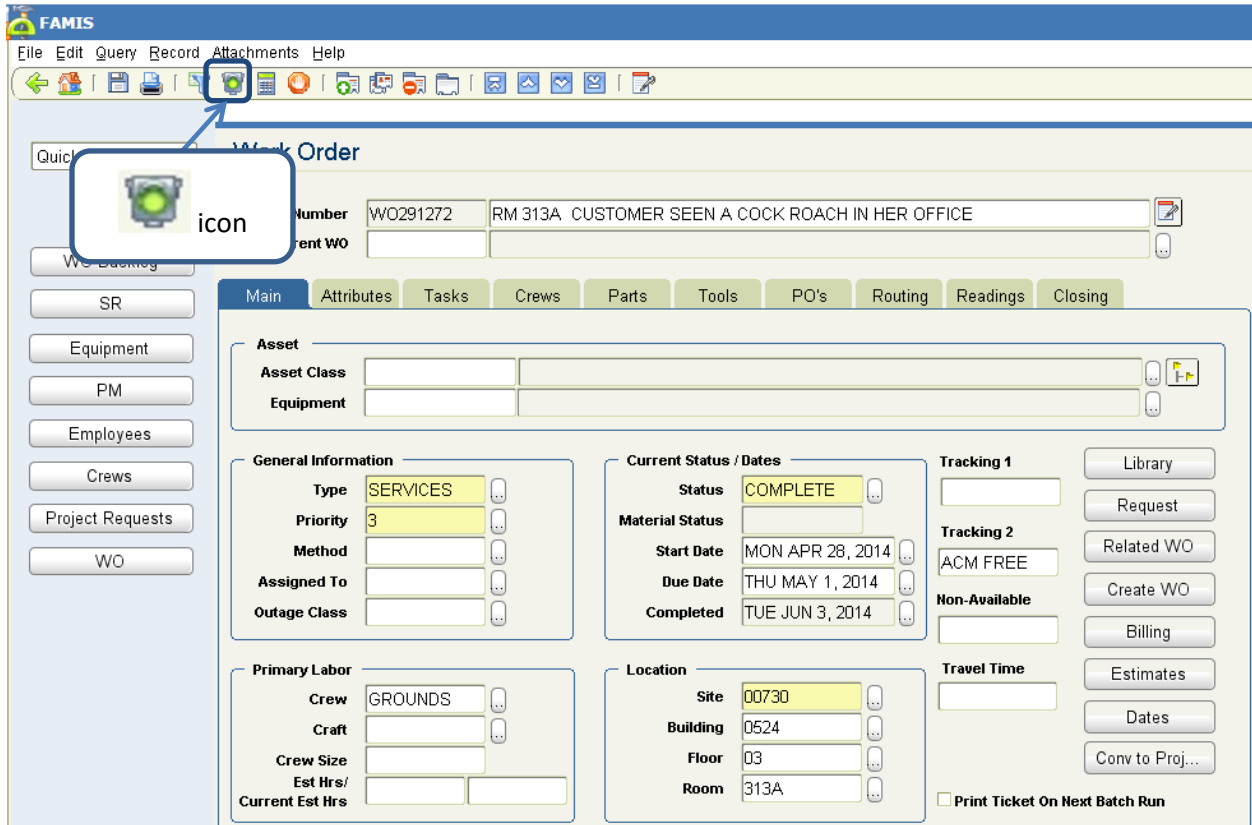
Print Ticket On Next Batch...

Enter criteria. It can be one criterion or multiple criteria, depending on your need

Execute your search

There are 2 ways to execute your search:

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







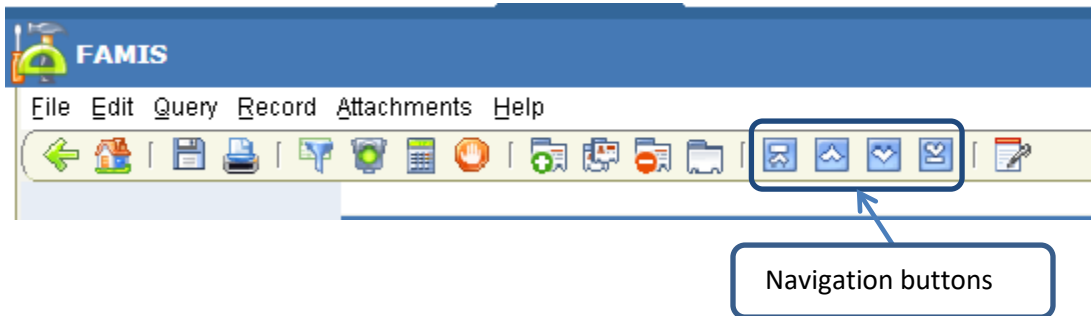
The screenshot displays the FAMIS software interface for a Work Order. The top menu bar includes 'File', 'Edit', 'Query', 'Record', 'Attachments', and 'Help'. Below the menu is a toolbar with various icons. A callout box with a blue border points to a search icon (a green circle with a magnifying glass) in the toolbar, with the text 'icon' next to it. The main window title is 'Work Order'. The form contains the following fields and sections:

- Number:** WO291272
- RM:** 313A
- Description:** CUSTOMER SEEN A COCK ROACH IN HER OFFICE
- Asset Section:** Asset Class and Equipment fields.
- General Information:** Type (SERVICES), Priority (3), Method, Assigned To, and Outage Class.
- Current Status / Dates:** Status (COMPLETE), Material Status, Start Date (MON APR 28, 2014), Due Date (THU MAY 1, 2014), and Completed (TUE JUN 3, 2014).
- Primary Labor:** Crew (GROUNDS), Craft, Crew Size, Est Hrs, and Current Est Hrs.
- Location:** Site (00730), Building (0524), Floor (03), and Room (313A).
- Tracking 1:** Library, Request, Related WO, Create WO, Billing, Estimates, Dates, and Conv to Proj... buttons.
- Tracking 2:** ACM FREE button.
- Non-Available:** Field.
- Travel Time:** Field.
- Print Ticket On Next Batch Run:** Check box.

Go to the next result

You may get multiple results after executing the search. For example, there might be more than one work order that is assigned to you today. In order to navigate to each result, FAMIS provides 4 navigation buttons on the navigation bar:

1.  - go to the first result
2.  - go to the previous result
3.  - go to the next result
4.  - go to the last result



Advance Search

'Wildcard' search

Sometimes we remember only part of search criteria. For example, we only remember the last four numbers of a work order are 1234, the first name of an employee is 'Mike' , etc.



FAMIS provides a special 'wildcard' character - the percent sign: **%** .

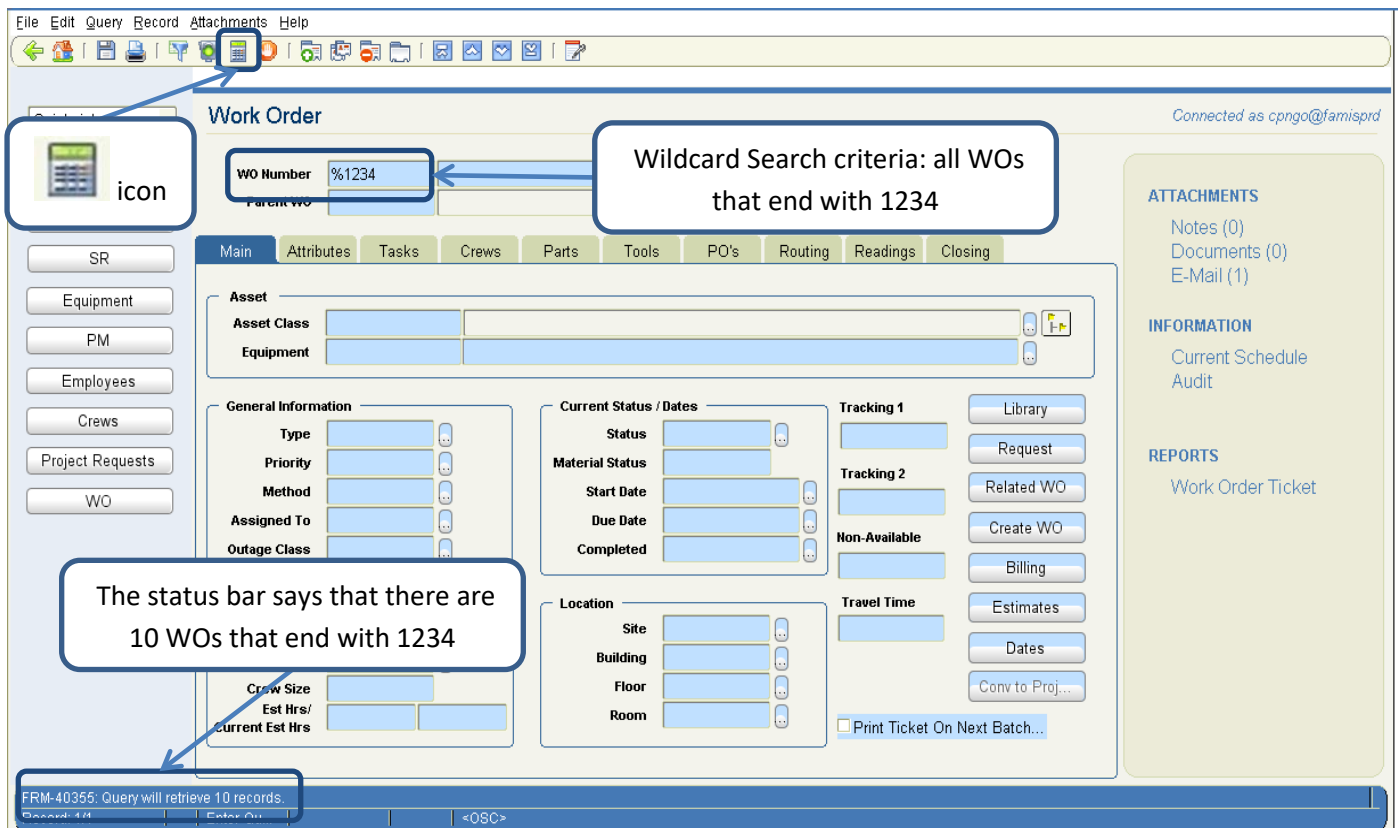
The percent sign will replace any leading or ending missing characters.

You can put %1234 to search all work orders that have 1234 as its last four numbers are

Count the results

Before executing the search, FAMIS allows a user to know how many results will come back from the search.

Before clicking on the  icon to execute the search, you can click on the  icon to count how many results return from the search. The number shows up in the status bar:

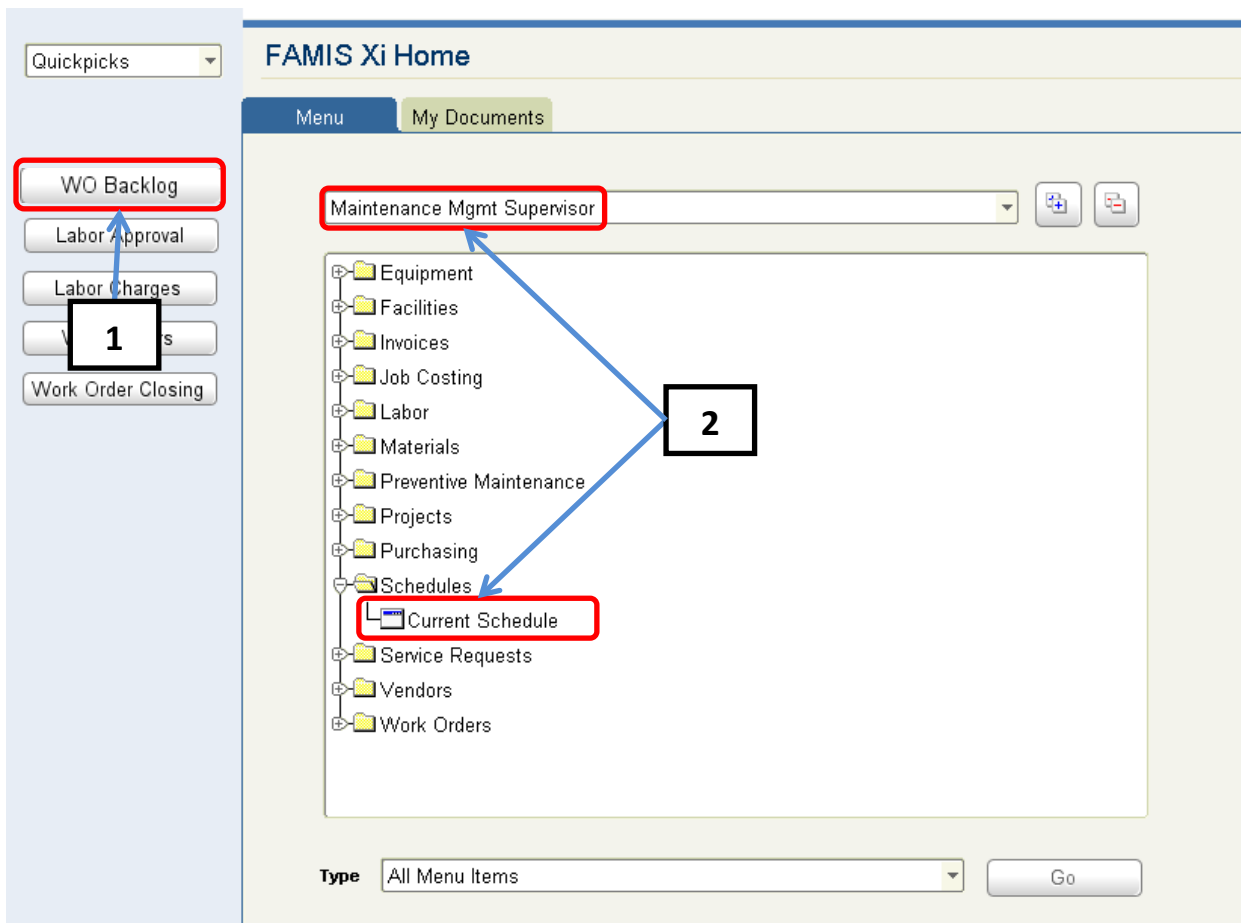


The screenshot shows the FAMIS Work Order search interface. The 'WO Number' field is set to '%1234'. A callout box explains: 'Wildcard Search criteria: all WOs that end with 1234'. The status bar at the bottom shows 'FRM-40355: Query will retrieve 10 records.' Another callout box states: 'The status bar says that there are 10 WOs that end with 1234'. A third callout points to the search icon in the top toolbar.

Current Schedule Workbench / WO Backlog

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

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



Current Schedule Workbench / WO Backlog Overview

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

Each line in the list gives information about one Work Order. We can see that WO Number, Start Date, Building, Priority, Status, Description, Craft, Maint Type, Crew, Assigned person, Equipment that associates with the Work Order, Due Date, Service Request Number, Scheduled Date, Department, etc. You can change the order of the columns.

The screenshot displays the 'All Work Orders' folder in the Schedule Workbench. A table lists work orders with columns for WO Number, Start Date, Building, P, Status, and Description. Annotations include a red box around the 'Folder' dropdown, a blue arrow pointing to the 'Building' column header, a callout box pointing to the table rows, a callout box pointing to the scrollbar, and a red box around the bottom toolbar.

Folder: All Work Orders

Click here and choose different predefined views

WO Number	Start Date	Building	P	Status	Description
WO254293					REPORT AT THE COMPLET
WO255360					TO 5,000 CFM ANNUAL
WO255367	THU JAN 2, 2014	0506	3	OPEN	HVAC AIR HANDLING UNIT, 3 TONS THROUGH 24 TONS AN
WO255127	THU JAN 2, 2014	0520	3	OPEN	HVAC DRINKING FOUNTAIN ANNUAL
WO255375	THU JAN 2, 2014	0506	3	OPEN	HVAC FAN, CENTRIFUGAL, UP TO 5,000 CFM ANNUAL
WO255385	THU JAN 2, 2014	0506	3	OPEN	HVAC FAN COIL UNIT ANNUAL
WO255150	THU JAN 2, 2014	0516	3	OPEN	HVAC AIR HANDLING UNIT, 25 TONS THROUGH 50 TONS #
WO255153	THU JAN 2, 2014	0516	3	OPEN	HVAC CONTROLS, CENTRAL SYSTEM, ELECTRO/PNEUMA*
WO255394	THU JAN 2, 2014	0506	3	OPEN	HVAC DRINKING FOUNTAIN ANNUAL
WO255399	THU JAN 2, 2014	0507	3	OPEN	HVAC CENTRIFUGAL PUMP OVER 1 H.P. ANNUAL
WO255407	THU JAN 2, 2014	0507	3	OPEN	HVAC SUBMERSIBLE PUMP, 1 H.P. AND OVER ANNUAL
WO255411	THU JAN 2, 2014	0520	3	OPEN	HVAC AIR COMPRESSOR, RECIPROCATING, 5 TO 40 H.P. A
WO255441	THU JAN 2, 2014	0523	3	OPEN	HVAC FAN, CENTRIFUGAL, UP TO 5,000 CFM ANNUAL
WO255445	THU JAN 2, 2014	0523	3	OPEN	HVAC UNIT HEATER, GAS RADIANT ANNUAL
WO255448	THU JAN 2, 2014	0523	3	OPEN	HVAC A/C SPLIT SYSTEM, DX, AIR COOLED, UP TO 10 TON
WO255451	THU JAN 2, 2014	0523	3	OPEN	HVAC PACKAGE UNIT, AIR COOLED, 3 TONS THROUGH 24
					HVAC AIR HANDLING UNIT, 3 TONS THROUGH 24 TONS AN
					HVAC DRINKING FOUNTAIN ANNUAL

Slide this bar to see the rest columns

Check All... Uncheck All... Assign WO... Close WO... Export... Labor... Convert to Proj...

Create custom view

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

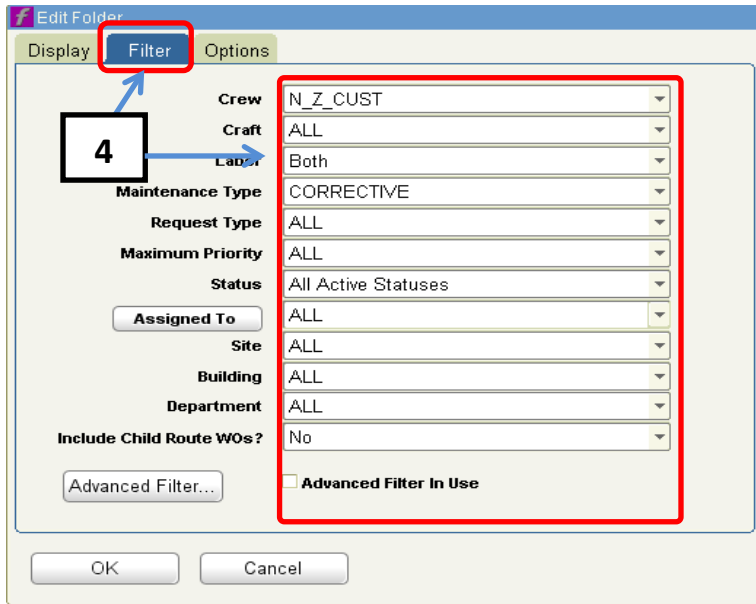
Current Schedule

Folder: All Work Orders 3 Edit...

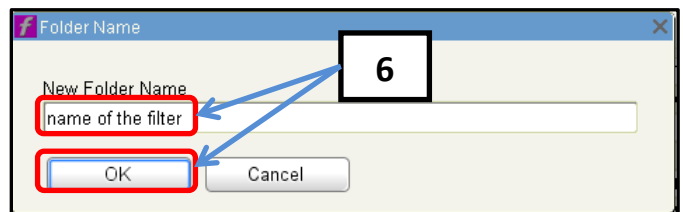
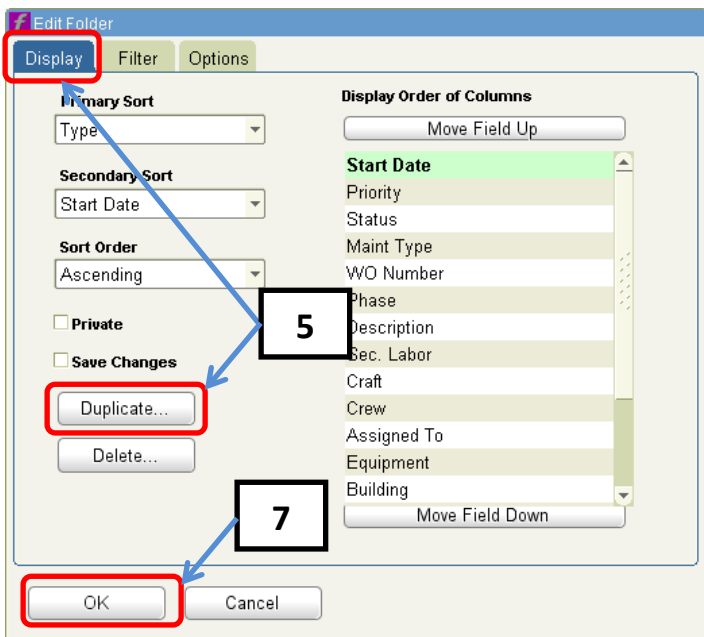
ding	P	Status	Description	Craft	Type	PI
<input checked="" type="checkbox"/>	3	OPEN	HVAC FAN, CENTRIFUGAL, UP TO 5,000 CFM SEMI-ANNUAL PM		PREVENTIVE	
<input type="checkbox"/>	3	OPEN	HVAC ZONE CONTROL SEMI-ANNUAL PM	N_Z_MAINT	PREVENTIVE	
<input type="checkbox"/>	3	OPEN	HVAC ZONE CONTROL SEMI-ANNUAL PM	N_Z_MAINT	PREVENTIVE	
<input type="checkbox"/>	3	OPEN	HVAC FAN COIL UNIT SEMI-ANNUAL PM		PREVENTIVE	
<input type="checkbox"/>	3	OPEN	HVAC CENTRIFUGAL PUMP OVER 1 H.P. QUARTERLY PM		PREVENTIVE	
<input type="checkbox"/>	3	OPEN	HVAC AIR HANDLING UNIT, 3 TONS THROUGH 24 TONS QUARTERLY PM		PREVENTIVE	
<input type="checkbox"/>	3	OPEN	HVAC CENTRIFUGAL PUMP OVER 1 H.P. QUARTERLY PM		PREVENTIVE	
<input type="checkbox"/>	3	OPEN	HVAC FAN, CENTRIFUGAL, UP TO 5,000 CFM SEMI-ANNUAL PM		PREVENTIVE	
<input type="checkbox"/>	3	OPEN	HVAC BOILER, HOT WATER; OIL, UP TO 120 MBH MONTHLY PM		PREVENTIVE	
<input type="checkbox"/>	3	OPEN	HVAC ZONE CONTROL SEMI-ANNUAL PM	N_Z_MAINT	PREVENTIVE	
<input type="checkbox"/>	3	OPEN	HVAC ZONE CONTROL SEMI-ANNUAL PM	N_Z_MAINT	PREVENTIVE	
<input type="checkbox"/>	3	OPEN	HVAC FAN, CENTRIFUGAL, UP TO 5,000 CFM SEMI-ANNUAL PM		PREVENTIVE	
<input type="checkbox"/>	3	OPEN	HVAC COMPRESSED AIR DRYER SEMI-ANNUAL PM		PREVENTIVE	
<input type="checkbox"/>	3	OPEN	HVAC COMPRESSED AIR DRYER SEMI-ANNUAL PM		PREVENTIVE	
<input type="checkbox"/>	3	OPEN	HVAC BOILER, HOT WATER; OIL, UP TO 120 MBH MONTHLY PM		PREVENTIVE	
<input type="checkbox"/>	3	OPEN	HVAC FAN COIL UNIT SEMI-ANNUAL PM		PREVENTIVE	
<input type="checkbox"/>	3	OPEN	HVAC CENTRIFUGAL PUMP OVER 1 H.P. QUARTERLY PM		PREVENTIVE	
<input type="checkbox"/>	3	OPEN	HVAC ZONE CONTROL SEMI-ANNUAL PM	N_Z_MAINT	PREVENTIVE	

Check All... Uncheck All... Assign WO... Close WO... Export... Labor... Convert to Proj...

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






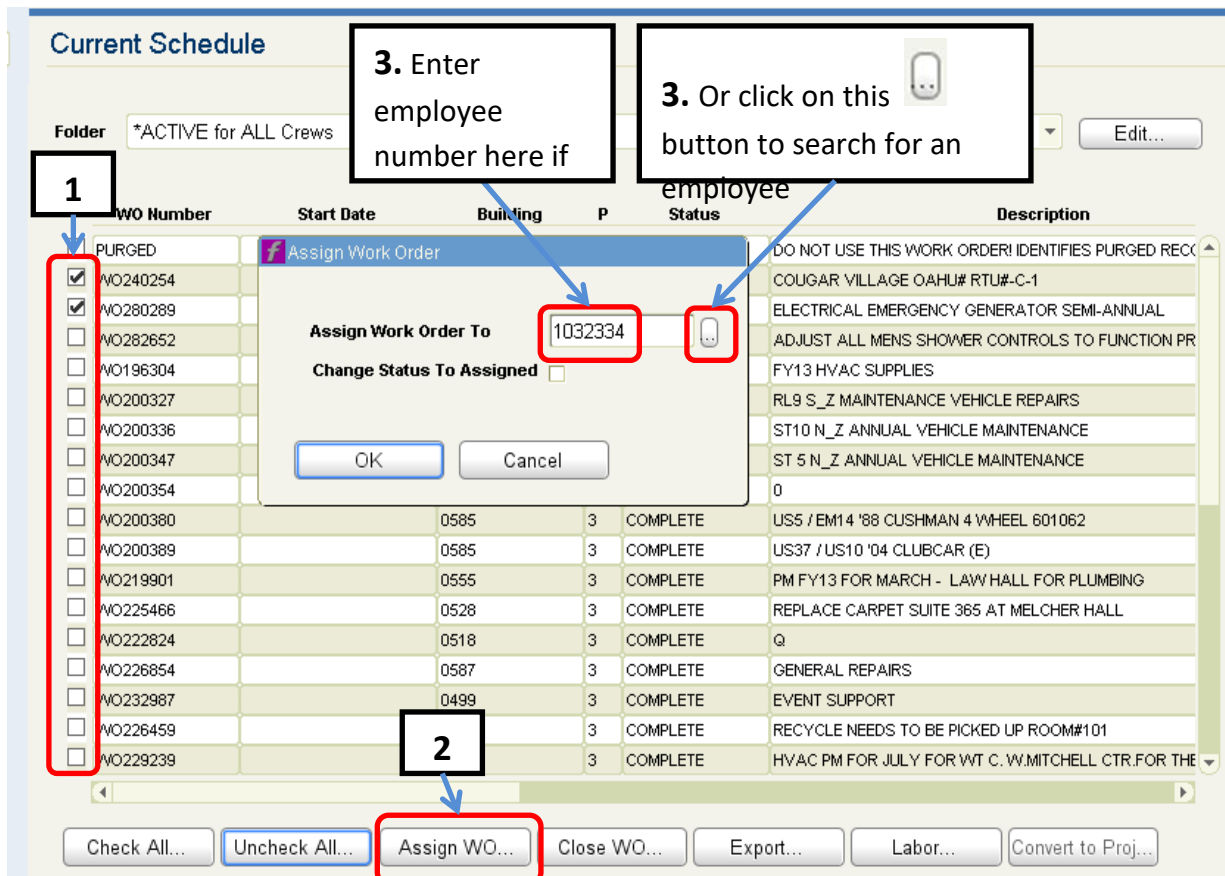
2. After selecting criteria, click **display**, then click **duplicate**
3. Enter **a name for a Filter**, click **OK**
4. Click **OK** again, work orders that meet criteria will be displayed



Current Schedule Functionalities

Assign Work Orders to Employees

1. Put checkmarks on Work Orders that you want to assign
2. Click **Assign WO...** button
3. Enter **the employee's PeopleSoft number** if you know or click on the  button to search for an employee, please refer to Basic Search and Advance Search sections to get more detail information about searching in FAMIS
4. If you click on  button in step 3, enter search criteria. It can be **Name, Crew, Craft, and/or Employee Number**. For example, you can search for any employee with first name of David in ELECTRICAL Crew. Please refer to Basic Search and Advance Search section from page 18 to 22 to get more detail information about search function
 - 4.1. Press **F8** or the  button to execute the search
 - 4.2. FAMIS may return multiple rows. **Click on a row that you want** (the row will turn green at that time)
 - 4.3. Click **OK button**
5. If you also want to change the status of the Work Orders to **ASSIGNED**, check the box next to **Change Status To Assigned**
6. Click OK Button




The screenshot shows the 'Current Schedule' interface. A dialog box titled 'Assign Work Order' is open, with the following fields and options:

- Assign Work Order To:** 1032334
- Change Status To Assigned:**
- Buttons:** OK, Cancel

The background table has the following columns: WO Number, Start Date, Building, P, Status, and Description. The 'Assign WO...' button at the bottom is highlighted with a red box.

Mass Closing Work Orders

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

1. Put checkmarks on Work Orders that you want to change the status
2. Click on Close WO... Button
3. Click on the  button next to the Status
4. Click on the status that you want the WOs to have (that status will be highlighted in blue color)
5. Click OK button
6. Click OK button again

Here is the list of Work Order statuses available in FAMIS and their definitions.

WO Status	Active	Email Notification	Definition
ASSIGNED	Y	Y	Work order has been assigned to a specific employee
COMPLETE	Y	Y	Employee has reported to his/her supervisor that the work has been completed
OPEN	Y	Y	Work order is active and pending assignment after review by crew supervisor
REVIEW	Y	N	Work order requires further review to address some type of issue
EST SENT	Y	N	Quotes for work has been sent to customer
EST APPRVD	Y	N	Quote has been approved by the customer
EST RECVD	Y	N	Quote has been returned back to crew supervisor
HOLD	Y	N	Work Order has been delayed for a reason
MAT RECVD	Y	N	Material for a work order has been received into the work order. Materials are awaiting pick up from FASTENAL
WAIT MATRL	Y	N	Used to denote a work order cannot move forward until materials are ordered and received into the work order.
PARENT ONL	Y	N	Used to denote a work order that is used as a parent for holding information on long term work orders
RET-SERV	Y	N	Used by AUTO SHOP to denote a vehicle has been returned to service.
CANCELLED	N	N	Work order is cancelled. Work will not be performed. If the crew or call center cancelled the work order, the customer must be notified with an explanation.
CLOSED	N	Y	Supervisor has reviewed the work order for completeness and no further action is required. All billable charges may be released.

Current Schedule

ACTIVE for ALL Cre...

WO Number	St
<input checked="" type="checkbox"/> WO263765	TUE JAN 3
<input checked="" type="checkbox"/> WO000111	FRI AUG 3
<input type="checkbox"/> WO000112	FRI AUG 3
<input type="checkbox"/> WO000114	FRI AUG 3
<input type="checkbox"/> WO000115	FRI AUG 3
<input type="checkbox"/> WO000116	FRI AUG 3
<input type="checkbox"/> WO000136	FRI AUG 3
<input type="checkbox"/> WO000139	FRI AUG 3
<input type="checkbox"/> WO000140	FRI AUG 3
<input type="checkbox"/> WO000141	FRI AUG 3
<input type="checkbox"/> WO000142	FRI AUG 3
<input type="checkbox"/> WO000143	FRI AUG 3
<input type="checkbox"/> WO000144	FRI AUG 3
<input type="checkbox"/> WO000145	FRI AUG 3
<input type="checkbox"/> WO000146	FRI AUG 3
<input type="checkbox"/> WO000147	FRI AUG 3
<input type="checkbox"/> WO000148	FRI AUG 3
<input type="checkbox"/> WO000149	FRI AUG 3

Close Work Order(s)

Status: ☰

Completed:

Condition:

Cause:

Action:

Close Comments:

OK

Statuses

Find%

Status	Complete Indicator	Comments
ACM FOUND	N	ASBESTOS CONTAINING M
ACM FREE	N	NO ASBESTOS FOUND
CANCELLED	N	WORK HAS BEEN CANCEI
CLOSED	N	DO NOT DELETE THIS STA
COMPLETE	Y	WORK IS COMPLETE, PEN
CONV PROJ	N	DO NOT DELETE THIS STA
KEY RECYCL	N	KEY RETURNED TO LOCK
SUPERSEDED	N	DO NOT DELETE THIS STA
VALIDATION	N	BILLABLE WORK REQUES

OK Cancel

Choices in list: 9
Record: 1/1

Check All...
Uncheck...
Close WO...
Export...
Labor...
Convert to Proj...

Print Work Order Ticket

1. Put checkmarks on Work Orders that you want to print
2. Click Work Order Ticket on the right
3. Click Print button

Current Schedule Connected as cpngo@famispd

WO Number	Start Date
<input checked="" type="checkbox"/> WO263765	TUE JAN 30, 2001
<input checked="" type="checkbox"/> WO000111	FRI AUG 31, 2012
<input type="checkbox"/> WO000112	FRI AUG 31, 2012
<input type="checkbox"/> WO000114	FRI AUG 31, 2012
<input type="checkbox"/> WO000115	FRI AUG 31, 2012
<input type="checkbox"/> WO000116	FRI AUG 31, 2012
<input type="checkbox"/> WO000136	FRI AUG 31, 2012
<input type="checkbox"/> WO000139	FRI AUG 31, 2012
<input type="checkbox"/> WO000140	FRI AUG 31, 2012
<input type="checkbox"/> WO000141	FRI AUG 31, 2012
<input type="checkbox"/> WO000142	FRI AUG 31, 2012
<input type="checkbox"/> WO000143	FRI AUG 31, 2012
<input type="checkbox"/> WO000144	FRI AUG 31, 2012
<input type="checkbox"/> WO000145	FRI AUG 31, 2012
<input type="checkbox"/> WO000146	FRI AUG 31, 2012
<input type="checkbox"/> WO000147	FRI AUG 31, 2012
<input type="checkbox"/> WO000148	FRI AUG 31, 2012
<input type="checkbox"/> WO000149	FRI AUG 31, 2012

Print - selected Work Orders. Edit...

Report Criteria

WO Number CKD WOS' ...

All Marked To Print For Crew ALL ...

All Marked To Print For Craft ALL ...

All Marked To Print For Assigned To ALL ...

Complete Route

Include Secondary Labor

Printer: [Dropdown] Set As Default...

Record: 1/1 <OSC>

ATTACHMENTS

Notes (0)
Documents (1)
E-Mail (0)

INFORMATION

W
E
C

REPORTS

Work Order Reports

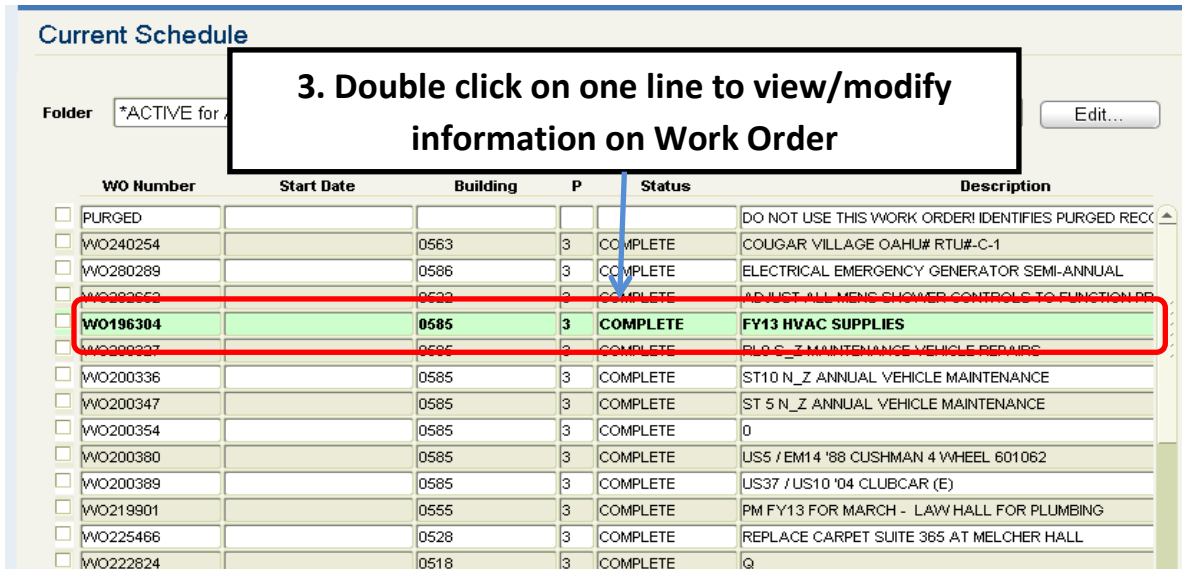
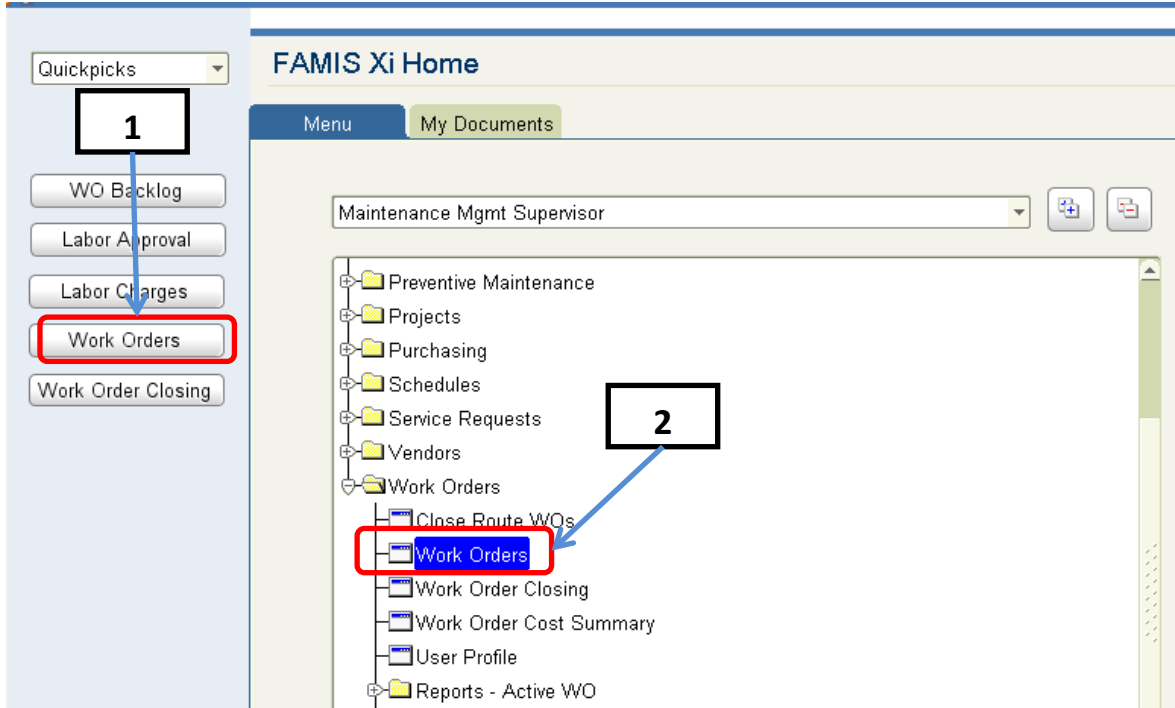
Check All... Uncheck All... Assign WO... Close WO... Export... Labor... Convert to Proj...

Work Order Form

How to open work order form

There are 3 main ways to go to Work Order form:

1. Click on **Work Orders shortcut button** on the left
2. Double click on a **Work Order** in **WO Backlog**
3. Double click on **Work Orders form** in Work Orders folder from the Home Screen.



Searching for Work Orders

Four ways you can search for a specific Work Order:

Searching by entering a Work Order number

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

Work Order

WO Number **1**

Parent WO

Main | Attributes | Tasks | Crews | Parts | Tools | PO's | Routing | Readings | Closing

Asset

Asset Class

Equipment

General Information

Type

Priority

Method

Assigned To

Outage Class

Current Status / Dates

Status

Material Status

Start Date

Due Date

Completed

Tracking 1

Tracking 2

Non-Available

Travel Time

Library

Request

Related WO

Create WO

Billing

Estimates

Dates

Conv to Proj...

Print Ticket On Next Batch...

“Wild Card” Search

The Wild Card search option allows you to view **all** Work Orders that meet a specific criterion. For example, let’s view all Work Orders in Building 585

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

The screenshot displays the 'Work Order' form interface. At the top, a toolbar contains several icons, with a search icon (magnifying glass) highlighted by a red box. A blue arrow points from this icon to a box containing the number '4'. Below the toolbar, the 'Work Order' title is visible. The form includes several input fields: 'WO Number' (containing '%6'), 'Parent WO', 'Asset Class', and 'Equipment'. A tabbed menu below these fields includes 'Main', 'Attributes', 'Tasks', 'Crews', 'Parts', 'Tools', 'PO's', 'Routing', 'Readings', and 'Closing'. The 'Main' tab is active, showing various sections: 'General Information' (Type, Priority, Method, Assigned To, Outage Class), 'Current Status / Dates' (Status, Material Status, Start Date, Due Date, Completed), 'Tracking 1', 'Tracking 2', 'Non-Available', 'Travel Time', and 'Location' (Site, Building, Floor, Room). The 'Building' field in the 'Location' section is highlighted with a red box and contains the text '%585%'. A blue arrow points from this field to a box containing the number '2'. On the right side, there are several buttons: 'Library', 'Request', 'Related WO', 'Create WO', 'Billing', 'Estimates', 'Dates', and 'Conv to Proj...'. At the bottom right, there is a checkbox labeled 'Print Ticket On Next Batch...'. The interface is designed for data entry and navigation within a work order management system.

Multiple Field Search

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

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

The screenshot shows the 'Work Order' form with the following fields and values:

- WO Number: [Empty]
- Parent WO: [Empty]
- Asset Class: [Empty]
- Equipment: [Empty]
- General Information:
 - Type: [Empty]
 - Priority: [Empty]
 - Method: [Empty]
 - Assigned To: [Empty]
 - Outage Class: [Empty]
- Current Status / Dates:
 - Status: [Empty]
 - Material Status: [Empty]
 - Start Date: [Empty]
 - Due Date: [Empty]
 - Completed: [Empty]
- Primary Labor:
 - Crew: PLANT
 - Craft: [Empty]
 - Crew Size: [Empty]
 - Est Hrs: [Empty]
 - Current Est Hrs: [Empty]
- Location:
 - Site: [Empty]
 - Building: %585%
 - Floor: [Empty]
 - Room: [Empty]

A red box highlights the 'Crew' field (containing 'PLANT') and the 'Building' field (containing '%585%'). A blue box with the number '2' is positioned below the 'Crew' field, with an arrow pointing to the 'Building' field.

Workbench Search

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

The screenshot shows a software window titled "Current Schedule". At the top, there is a "Folder" dropdown menu currently set to "All Work Orders" and an "Edit..." button. Below this is a table with the following columns: "WO Number", "Start Date", "Building", "P", "Status", and "Description". The table contains several rows, with the top row highlighted in blue. The rest of the table is empty.

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

This screenshot is identical to the one above, but with search criteria entered. The first row of the table is highlighted in blue. The "Building" column of this row contains the text "%585%" and the "Status" column contains "%OPEN%". A red rectangular box highlights these two cells. A blue arrow points from a white box containing the number "2" to the right side of the red box.

3. Press F8 to run query and view all Work Orders in the work bench that are OPEN and in building 585
4. Double click on the specific work order to view Work Order details

Current Schedule

Folder: All Work Orders Edit...

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

Work Order Form Overview

Work Order form is where you can see and modify any detail information about a Work Order.

The screenshot shows a 'Work Order' form with the following fields and sections:

- 1**: WO Number (WO266620)
- 2**: Description (CLEAN FLOORS IN HVAC /BMS SHEETMETAL SHOP)
- 3**: Parent WO
- 4**: Asset Class
- 5**: Type (CORRECTIVE)
- 6**: Priority (3)
- 7**: Method
- 8**: Assigned To (0085261)
- 9**: Status (COMPLETE)
- 10**: Location (Site: 00730, Building: 0585, Floor: 01, Room: 180E)
- 11**: Crew (HVAC)
- 12**: Craft
- 13**: Crew Size
- 14**: Est Hrs / Current Est Hrs
- 15**: Material Status (CANCELED)
- 16**: Tracking 1 (ACM FOUND)
- 17**: Tracking 2 (Non-Available)
- 18**: Completed (MON FEB 3, 2014)

Right sidebar sections:

- ATTACHMENTS**: Notes (0), Documents, E-Mail (2)
- INFORMATION**: Current Sc, Audit
- REPORTS**: Work Order

Buttons: Library, Request, Related WO, Create WO, Billing, Estimates, Dates, Conv to Proj

Print Ticket On Next Batch Run

1. *WO Number*

Unique number assigned to each work order

2. *Work Order brief description*

A brief description of current work order (maximum length is 64 characters)

3. *Parent WO*

Allows you to view/assign the parent work order of the current work order

4. *Equipment*

Allows you to view/edit the piece of equipment that associates with the current work order

5. *Maintenance Type*

Maintenance type represents the maintenance activity the work order performs. Here is the list of Maintenance Types available in FAMIS and their definitions.

- i. **CORRECTIVE** – refers to the work that brings facility to its original condition. This activity may consist of repair, restoration or replacement of components.
- ii. **ALTERATION** – refers to the work required to change the interior or physical characteristics of an existing facilities. Alterations may include work referred to as improvement, conversion, rehabilitation, remodeling or modernization.
- iii. **PREVENTIVE** – refers system-generated preventive maintenance and PM route WOs.
- iv. **SERVICE** – refers to anything that facility occupants or visitors might need beyond the operational maintenance of the hard assets of the building and its systems. Examples include custodial, event support, waste management, fleet, managing relocations or moves, landscaping, emergency preparedness, and etc....
- v. **ADMIN** – refers to standing work orders used to track shop supplies.

6. Priority

Priority field defines the priority of the work order. Here is the list of Work Order priorities available in FAMIS and their definitions:

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

7. Method

Method field allows specifying if the work order is performed:

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

8. Assigned To

Assigned To field allows user to view or assign the work order to a specific employee.

9. Work Order Status

Status field allows user to view/change the current work order status. Here is the list of Work Order statuses available in FAMIS and their definitions:

WO Status	Active	Email Notification	Definition
ASSIGNED	Y	Y	Work order has been assigned to a specific employee
COMPLETE	Y	Y	Employee has reported to his/her supervisor that the work has been completed
OPEN	Y	Y	Work order is active and pending assignment after review by crew supervisor
REVIEW	Y	N	Work order requires further review to address some type of issue
EST SENT	Y	N	Quotes for work has been sent to customer
EST APPRVD	Y	N	Quote has been approved by the customer
EST RECVD	Y	N	Quote has been returned back to crew supervisor
HOLD	Y	N	Work Order has been delayed for a reason
MAT RECVD	Y	N	Material for a work order has been received into the work order. Materials are awaiting pick up from FASTENAL
WAIT MATRL	Y	N	Used to denote a work order cannot move forward until materials are ordered and received into the work order.
PARENT ONL	Y	N	Used to denote a work order that is used as a parent for holding information on long term work orders
RET-SERV	Y	N	Used by AUTO SHOP to denote a vehicle has been returned to service.
CANCELLED	N	N	Work order is cancelled. Work will not be performed. If the crew or call center cancelled the work order, the customer must be notified with an explanation.
CLOSED	N	Y	Supervisor has reviewed the work order for completeness and no further action is required. All billable charges may be released.

10. Dates of Work Order

Here is the list of Date fields in Work Order form and their definitions:

Field Name	Description
Start Date	Date the work is scheduled to begin. Did not change with Priority Code, defaulted to the date the service request is converted to the work order. Can be changed by user.
Due Date	Calculated based off the Priority Code. Date the work is due to be finished. Can be changed by user.
Completed Date	Date the actual work was completed. This date will be filled in automatically when Status is set to COMPLETED.

11. Crew

Crew – allows you to select a crew to perform work order; every work order must have an assigned crew

12. Craft

Craft – allows you to select a craft or skill required for work order

13. Crew Size

Crew Size – minimum crew size to perform the work order

14. Est Hrs/ Current Est Hrs

Est Hrs/Current Est Hrs - allows you to enter an estimate number of hours needed for crew to perform the work/Current Est Hrs allows you to enter up-to-date estimate of hours needed to perform work order

15. Work Order location (site, building, floor, room)

Site – site work order needs to be performed in

Building – building the work order needs to be performed in

Floor – floor in building

Room – room in building work order needs to be performed in

16. Attachments (Notes, Documents, E-mail)

Notes – allow you to view the existing notes or create new notes for the current work order

Documents - allow you to view the existing files or attach new files for the current work order. The files could be in Word, Excel, PDF, or images.

E-mail - allow you to view the existing email sent from current work order or send new email to users/customer from current work order

17. Work Order Ticket

Allows you to print out detail information about the current work order

18. Buttons

Library – allows you to transfer a procedure library to the work order

Request – allows you to enter work order requestor information

Related WO – allows you to view parent and children work orders of current work order

Create WO – allows you to create a child work order of the current work order

Billing – allows you to view/enter work order billing information

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

Dates – date work order was scheduled

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

19. Task List of a Work Order

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

The screenshot displays a software interface for a Work Order. At the top, the title "Work Order" is visible. Below it, there are input fields for "WO Number" (containing "W0001649") and "Parent WO". A blue arrow points to the "Tasks" tab in the navigation menu, which is highlighted with a red box. The "Tasks" tab is selected, and the main content area is titled "Task List". A large red rounded rectangle is overlaid on this area with the text "Task list goes here". Below the Task List area is a "Close Comments" section with a text input field.

20. PO's tab

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

The screenshot shows the 'Work Order' interface with the 'PO's' tab selected. The interface includes a 'Reference' field, a menu bar with 'Main', 'Attributes', 'Tasks', 'Crews', 'Parts', 'Tools', 'PO's', 'Routing', and 'Ready'. A 'Purchase Requisition' window is open, displaying a table of requisition lines. The first line is highlighted in green and circled in red. To the right of the table are radio buttons for 'Active Orders Only' and 'All Orders', and a 'View...' button. Below the table is a 'Purchase Orders' section with a table of purchase orders.

1. Click on PO's tab

2. Click Orders button

3. Click here

4. Choose PREQ line

5. Click view button

Preq No.	Line	Status	Quantity	Vendor No.	Require Date
PRQ10087	1	PLACED	3.00	0000006409	10-SEP-2012

PO Number	Rel	Line	Status	Require Date	Qty. Ordered	Qty. Received	Received Date
PO000085		1	COMPLETE	10-SEP-2012	3.00	3.00	05-JAN-2013

Materials

Planning Material for a Work Order

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

Open specific Work Order form and navigate to the **Parts** tab

Work Order

WO Number: WO211749 | ELECTRICAL EMERGENCY GENERATOR WEEKLY

Parent WO: []

Main | Attributes | Tasks | Crews | **Parts** | Tools | PO's | Routing | Readings | Closing

Asset

Asset Class: []

Equipment: 1040125001 | EMERGENCY GENERATOR

General Information

Type: PREVENTIVE

Priority: 5

Method: []

Assigned To: []

Outage Class: []

Current Status / Dates

Status: OPEN

Material Status: []

Start Date: FRI DEC 6, 2013

Due Date: FRI DEC 6, 2013

Completed: []

Tracking 1

[]

Tracking 2

[]

Non-Available

[]

Travel Time

[]

Primary Labor

Crew: ELECTRICAL

Craft: []

Crew Size: 1

Est Hrs/Current Est Hrs: 2.11

Location

Site: 00730

Building: 0104

Floor: []

Room: []

Print Ticket On Next Batch Run

Library | Request | Related WO | Create WO | Billing | Estimates | Dates | Conv to Proj...

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

NOTE: The following manual shows how to add part to a Work Order for planning purposes only. It means that **no Purchase Order is made**. In order to purchase, please refer to the **shopping cart manual** right after this section

1. Click '...' to view and select parts

Work Order

WO Number: WO211749 ELECTRICAL EMERGENCY GENERATOR WEEKLY

Parent WO: []

Main | **1** | Tasks | Crews | **Parts** | Tools | PO's | Routing | Readings | Closing

Pick	Item Number	Description	Warehouse	Qty	M
<input type="checkbox"/>			STORES		
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					

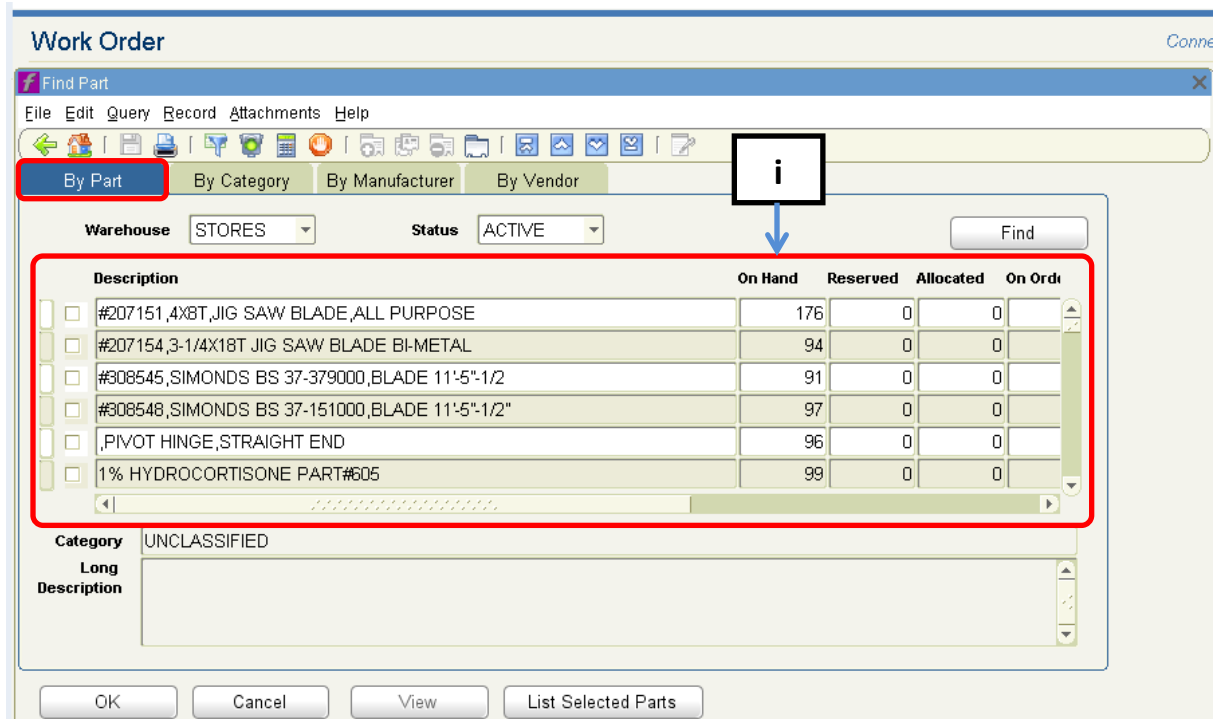
Buttons: View, Mat'l Catalog, Bills of Mat'l, Shopping Carts, Create Cart

Shopping Carts

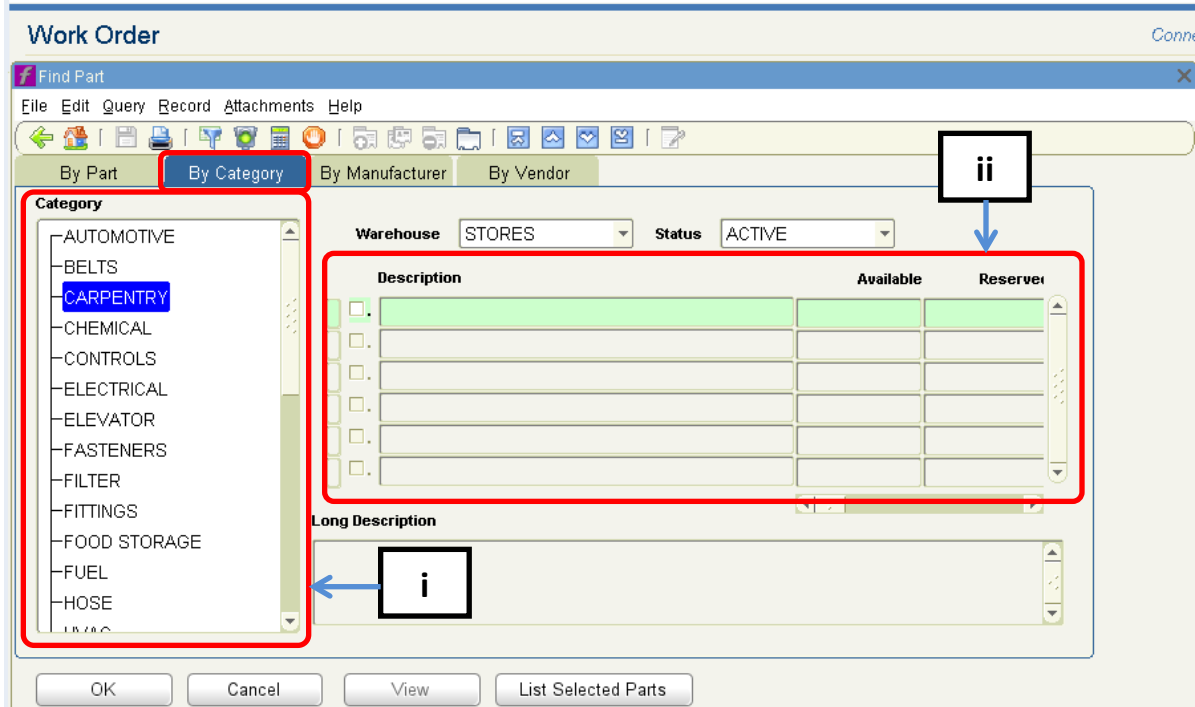
Shopping Cart	Created	Delivery Location	Status

View...

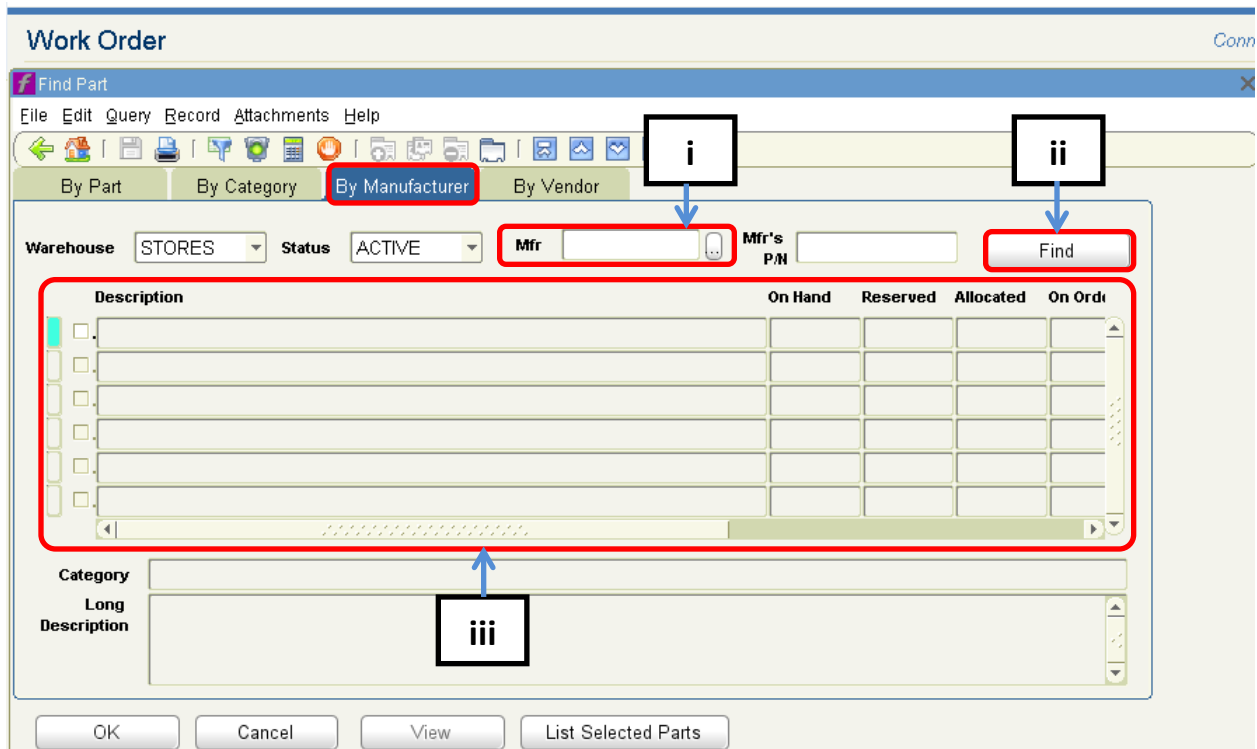
2. The **Item Number '...'** invokes the window below, allowing you to search, view and select parts in four different ways:
 - i. **By Part** – this tab displays all parts; query to search for specific part
 - a. All parts displayed here



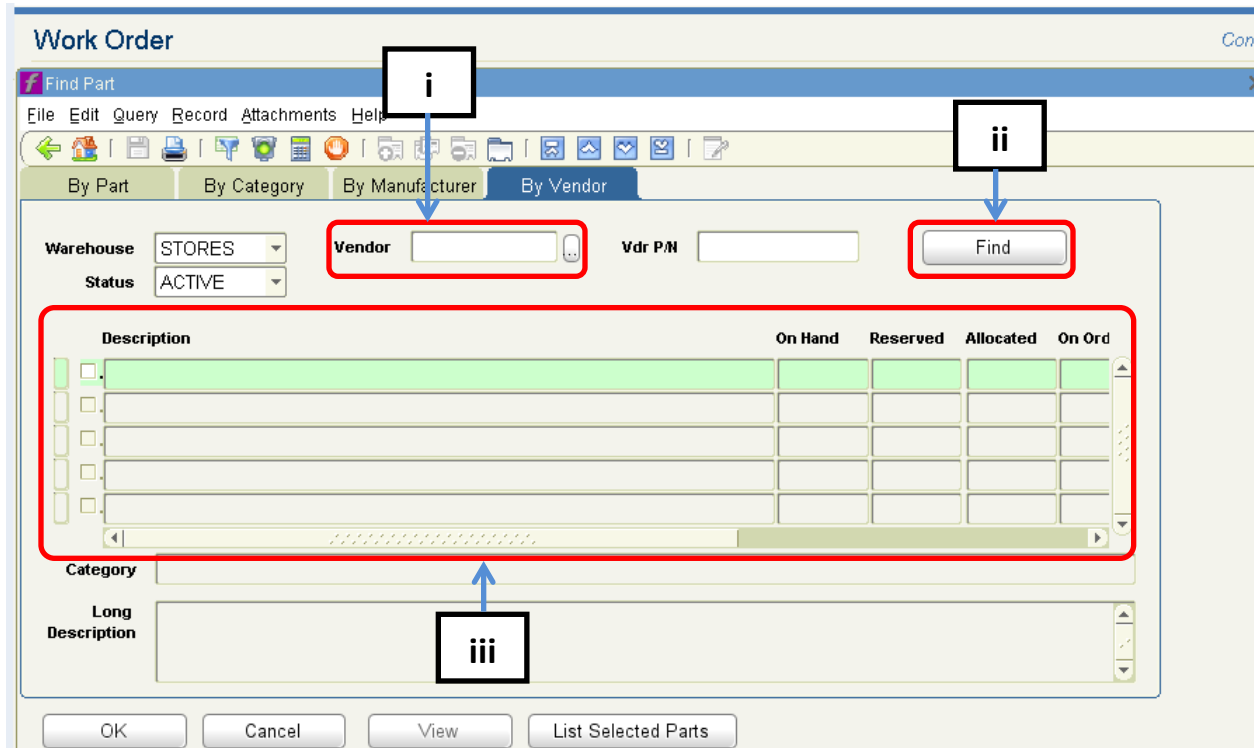
- ii. **By Category** –in this tab, parts are designated into categories; select specific category and then find part.
 - a. Categories of parts displayed here
 - b. Specific parts displayed here



- iii. **By Manufacturer** – this tab lets you search for a part by its manufacturer
 - a. Click **'...'** to view list of manufacturers, click OK after selecting a manufacturer
 - b. Press **Find** button
 - c. Select from newly displayed list of parts



- iv. **By Vendor** – this tab allows you to search for a specific part by its vendor
 - a. Click ‘...’ to view list of vendors, click OK after selecting a vendor
 - b. Press **Find** button
 - c. Select from newly displayed list of parts



Inventory Purchase with Shopping Cart feature

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

Work Order Conn

Find Part X

File Edit Query Record Attachments Help

Warehouse: STORES Status: ACTIVE Find

Description	On Hand	Reserved	Allocated	On Ord
<input checked="" type="checkbox"/> ,PIVOT HINGE,STRAIGHT END	96	0	0	
<input checked="" type="checkbox"/> 1% HYDROCORTISONE PART#605	99	0	0	
<input checked="" type="checkbox"/> 1/2" GENERAL PURPOSE REGULATOR/FILTER 5-150PSI PT#4ZL01	100	0	0	
<input checked="" type="checkbox"/> 1/2"DRIVE RATCHET PART#CR9-44809	100	0	0	
<input type="checkbox"/> 1/4" SWIVEL NUT WITH DEPRESSOR X 1/4"FLARE PATE# B12-830	100	0	0	
<input type="checkbox"/> 134A REFRIGERANT 30 LB.DRUM PART#01213430	90	0	0	

Category: UNCLASSIFIED

Long Description:

OK Cancel View List Selected Parts

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

Work Order

WO Number: W0211749 | ELECTRICAL EMERGENCY GENERATOR WEEKLY

Parent WO: []

Attributes | Tasks | Crews | **Parts** | Tools | PO's | Routing | Readings | Closing

Pick	Item Number	Description	Warehouse	Qty	M
<input type="checkbox"/>	435-038	,PIVOT HINGE,STRAIGHT END	STORES	1	M
<input type="checkbox"/>	800-030	1% HYDROCORTISONE PART#605	STORES	1	M
<input checked="" type="checkbox"/>	121-494	1/2" GENERAL PURPOSE REGULATOR/FILTEI	STORES	1	M
<input checked="" type="checkbox"/>	112-003	1/2"DRIVE RATCHET PART#CR9-44809	STORES	1	M
<input type="checkbox"/>					
<input type="checkbox"/>					

Shopping Carts

Shopping Cart	Created	Delivery Location	Status

Buttons: View, Mat'l Catalog, Bills of Mat'l, Shopping Carts, Create Cart, View...

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

Online Store Shopping Cart View Cart Order Status Profile
 Connected as rsohail

Work Order Number: **WO211749** Continue Shopping Save Cart **Check Out** Delete Cart Saved Carts

Your Reference:
 Stage Items in Stockroom: Status: **UNSUBMITTED**
 Submitted Date: Wed Nov 13, 2013
 Delivery Instructions:
 Pickup Date:
 Requestor: **Rabiya Sohail** Selling Price

Item #	Qty.	Description	Qty. In Stock	Qty. Available	Selling Price	Stock Room
435-038	1	,PIVOT HINGE,STRAIGHT END	96	96	\$4.86	STORES
800-030	1	1% HYDROCORTISONE PART#605	99	99	\$10.76	STORES
Total:\$15.62						

- Enter **Delivery Instructions** and **Pickup Date**; press Continue button to proceed

Online Store Shopping Cart Profile
 Connected as rsohail

Please enter the following information Cancel **Continue**

Work Order Number: **WO211749** Stage Items in Stockroom:

Work Order Description: **ELECTRICAL EMERGENCY GENERATOR WEEKLY** Delivery Instructions:

Your Reference:
 Pickup Date: **Wed Nov 13, 2013**

Item #	Qty.	Description	Qty. In Stock	Qty. Available	Selling Price	Stock Room
435-038	1	,PIVOT HINGE,STRAIGHT END	96	96	\$4.86	STORES
800-030	1	1% HYDROCORTISONE PART#605	99	99	\$10.76	STORES
Total:\$15.62						

- Review information; Press **Edit** Cart to make changes if necessary or press **Submit** to purchase materials/parts

Online Store Shopping Cart Profile
 Connected as rsohail

Edit Cart **Submit**

Work Order Number: **WO211749** Status: **UNSUBMITTED**

Your Reference:
 Submitted Date: **Wed Nov 13, 2013**
 Stage Items in Stockroom: Pickup Date:
 Delivery Instructions:
 Requestor: **Rabiya Sohail**

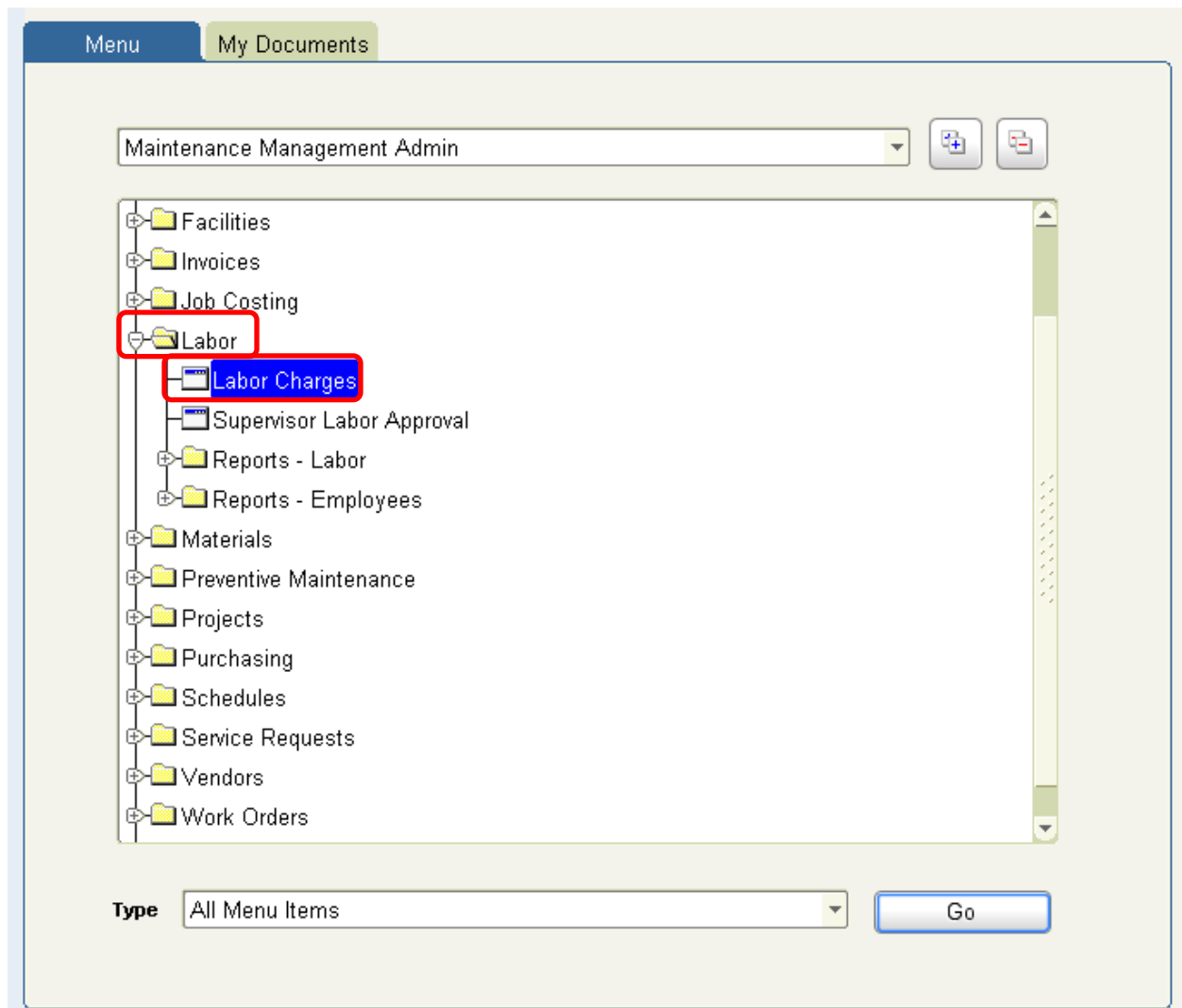
Item #	Qty.	Description	Qty. In Stock	Qty. Available	Selling Price	Stock Room
435-038	1	,PIVOT HINGE,STRAIGHT END	96	96	\$4.86	STORES
800-030	1	1% HYDROCORTISONE PART#605	99	99	\$10.76	STORES
Total:\$15.62						

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

Time Card Entry

The Labor Timecard form allows you to enter labor transactions that are charged a work order; labor can only be charged to an open work order.

To open the labor timecard form, double click Labor Charges under Labor in the main menu



Adding Time for Route Work Orders

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

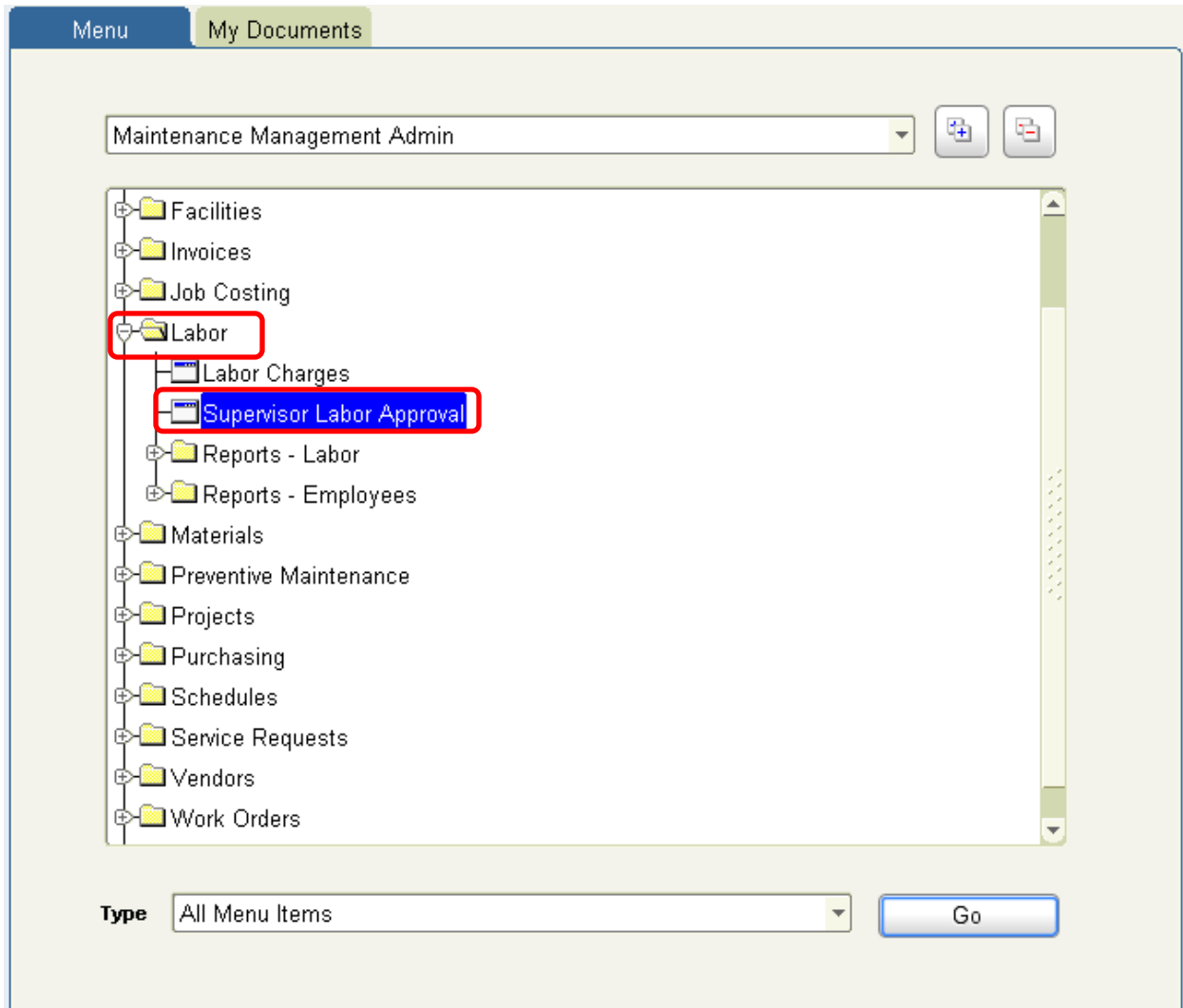
The screenshot shows the 'Labor Timecard' form. At the top right, it says 'Connected as cpngo@'. The form has several input fields: 'Employee' with the value '1032334', 'Work Date' with 'TUE JUN 10, 2014', and 'Labor Status' with 'ENTERED'. There is a 'View Leave' button. Below these fields is a 'Timecard' section with a 'Daily Schedule' tab. A table with columns 'WO Number', 'Location', 'WO Description', 'Hours', 'Task Code', 'Pay Code', 'Labor Class', 'Shift', 'Comments', and 'Work Done?' is visible. The 'Hours' column has a value of '.00'. Below the table is a 'Total Hours' field with '.00'. At the bottom, there are several buttons: 'Route Work Orders', 'Equip Rental...', 'View WO...', 'Status History...', 'Print', 'Save and Approve', and 'Save, Don't Approve'. Annotations: '2' points to the Employee field, '3' points to the Work Date field, and '4' points to the 'Route Work Orders' button.

The screenshot shows the 'Find Route Work Orders' dialog box. It has a menu bar with 'File', 'Edit', 'Query', 'Record', 'Attachments', and 'Help'. Below the menu bar is a toolbar with various icons. The main area is divided into sections: 'Parent Route Work Order' with a 'WO Number' field containing 'WO260616' and a 'Find' button; 'Equipment Work Orders' with a table; and 'Enter Route Labor Values' with fields for 'Task Code', 'Hours', 'Pay Code', 'Labor Class', and 'Work Done?'. The 'Hours' field contains '3'. At the bottom, there are buttons for 'Check All', 'Uncheck All', 'OK', and 'Cancel'. Annotations: '5 & 6' points to the 'WO Number' and 'Find' fields, '7' points to the 'Hours' field, and '8' points to the 'OK' button.

WO Number	Status	Description	Type	Site	Building	Eq
<input type="checkbox"/> WO260617	OPEN	HVAC AIR HANDLING UNIT, 25 TONS THROUGH 50 TONS	PREVENTIVE	00730	0516	51
<input type="checkbox"/> WO260618	OPEN	HVAC AIR HANDLING UNIT, 25 TONS THROUGH 50 TONS	PREVENTIVE	00730	0516	51
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						

Supervisor Labor Approval

This form allows the supervisor to approve Employee Labor Timecard; to open, double click on Supervisor Labor Approval under Labor in the main menu to open form



Supervisor Labor Approval Connected as rschail@f

< Fri 08/16/2013 >

Supervisor: BRAZIL, MYRLIN

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

Timecard | Employee Schedule | Unapproved Timecards | Report

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

Comments on Labor form

WO Description: ICE MACHINE, FLAKE OR CUBE

Warnings:

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

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

6.a

6.a) **Go To Approval** button on the Supervisor Labor Approval form invokes the window above. Select Approve or Reject employee labor timecard after reviewing information.

6.b) **Edit** button invokes the window below. This takes the supervisor to the employee labor timecard and allows to edit it.

Labor Timecard Connected as rschail

Employee: 0087750 BRAZIL, MYRLIN Work Date: FRI AUG 16, 2013 View Leave

Labor Status: E APPROVE

Timecard | Daily Schedule

WO Number	Location	WO Description	Hours	Task Code	Pay Code	Labor Class	Shift	Comments	Work Done?
WO211527	00730/0497	ICE MACHINE, FLAKE OR CU	1.00		REGULAR	EMPLOYEE	1		<input type="checkbox"/>
			Total Hours	1.00					

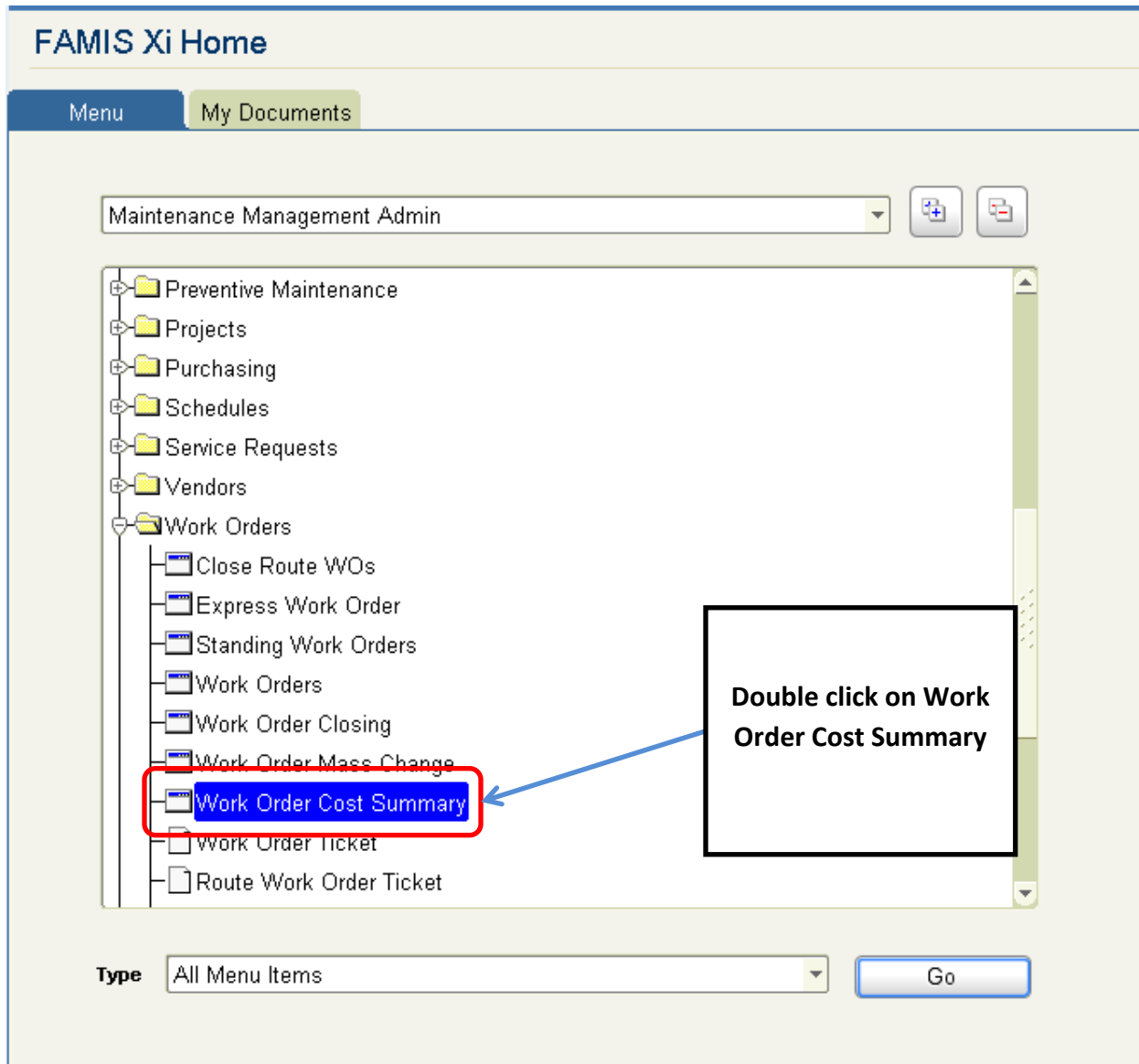
Route Work Orders... Equip Rental... View WO... Status History... Print Save and Approve Save, Don't Approve

6.b

Work Order Cost

In order to keep track the cost of work orders, we need to use the Work Order Cost Summary form. There are two ways to access the Work Order Cost Summary:

1. Double click on **Work Order Cost Summary form** in Work Order folder then **search** for a **Work Order** number
2. Right click on a **WO Number** in **Work Order form** then choose **Cost Summary...**



Work Order

WO Number **WO211749** ROOM #367

Parent WO

Copy
Paste
View/Edit...
Quick Schedule...
Close...
Cost Summary...
Print...

Main Attributes Tasks Parts Tools PO's

Asset

Asset Class

Equipment

General Information

Type **CORRECTIVE**

Priority **3**

Method **IN HOUSE**

Assigned To **0088759**

Outage Class

Current Status / Dates

Status **COMPLETE**

Material Status

Start Date **WED JAN 16, 2013**

Due Date **SAT JAN 19, 2013**

Completed **MON JUL 1, 2013**

Primary Labor

Crew **HVAC**

Craft **HVAC-BMS**

Crew Size

Est Hrs/ Current Est Hrs

Location

Site **00730**

Building **0592**

Floor **03**

Room **367**

Tracking 1

Tracking 2 **ACM FREE**

Non-Available

Travel Time

Print Ticket On Next Batch Run

Library
Request
Related WO
Create WO
Billing
Estimates
Dates
Conv to Proj...

Right click on the WO number then choose Cost Summary

3.