UNIVERSITY of HOUSTON

FACILITIES SERVICES

FAMIS Training Manual

TABLE OF CONTENTS

Overview of Service Request – Work Order Workflow in FAMIS 4

Logging into FAMIS 5

Logging into FAMIS 5

Select a Tab 7

FAMIS Home Screen: 8

Role Selection: 10

Content Window: 11

Folder 11

Forms 11

Reports 11

Shortcut buttons 12

Form navigation 13

Open a form 13

Navigation Bar functions 14

Basic Search 15

Where and when can you perform a search? 15

Start the search function: 15

Enter your criteria 16

Execute your search 17

Go to the next result 18

Advance Search 19

'Wildcard' search 19

Count the results 19

Current Schedule Workbench / WO Backlog 20

Current Schedule Workbench / WO Backlog Overview 21

Create custom view 22

Current Schedule Functionalities 24

Assign Work Orders to Employees 24

Mass Closing Work Orders 26
Print Work Order Ticket 28
Work Order Form 29
How to open work order form 29
Searching for Work Orders 30
Searching by entering a Work Order number 30
"Wild Card" Search 31
Multiple Field Search 32
Workbench Search 33
Work Order Form Overview 35
1. WO Number 36
2. Work Order brief description 36
3. Parent WO 36
4. Equipment 36
5. Maintenance Type 36
6. Priority 37
7. Method 37
8. Assigned To 37
9. Work Order Status 38
10. Dates of Work Order 38
11. Crew 39
12. Craft 39
13. Crew Size 39
14. Est Hrs/ Current Est Hrs 39
15. Work Order location (site, building, floor, room) 39
16. Attachments (Notes, Documents, E-mail) 39
17. Work Order Ticket 39
18. Buttons 39
19. Task List of a Work Order 40
20. PO's tab 41
Materials 43

Planning Material for a Work Order 43
Inventory Purchase with Shopping Cart feature 49
Time Card Entry 52
Labor Timecard Form details 53
Adding Time for Route Work Orders 54
Supervisor Labor Approval 55
Correct Time Card Entry 58
Work Order Cost 60

Overview of Service Request – Work Order Workflow in FAMIS

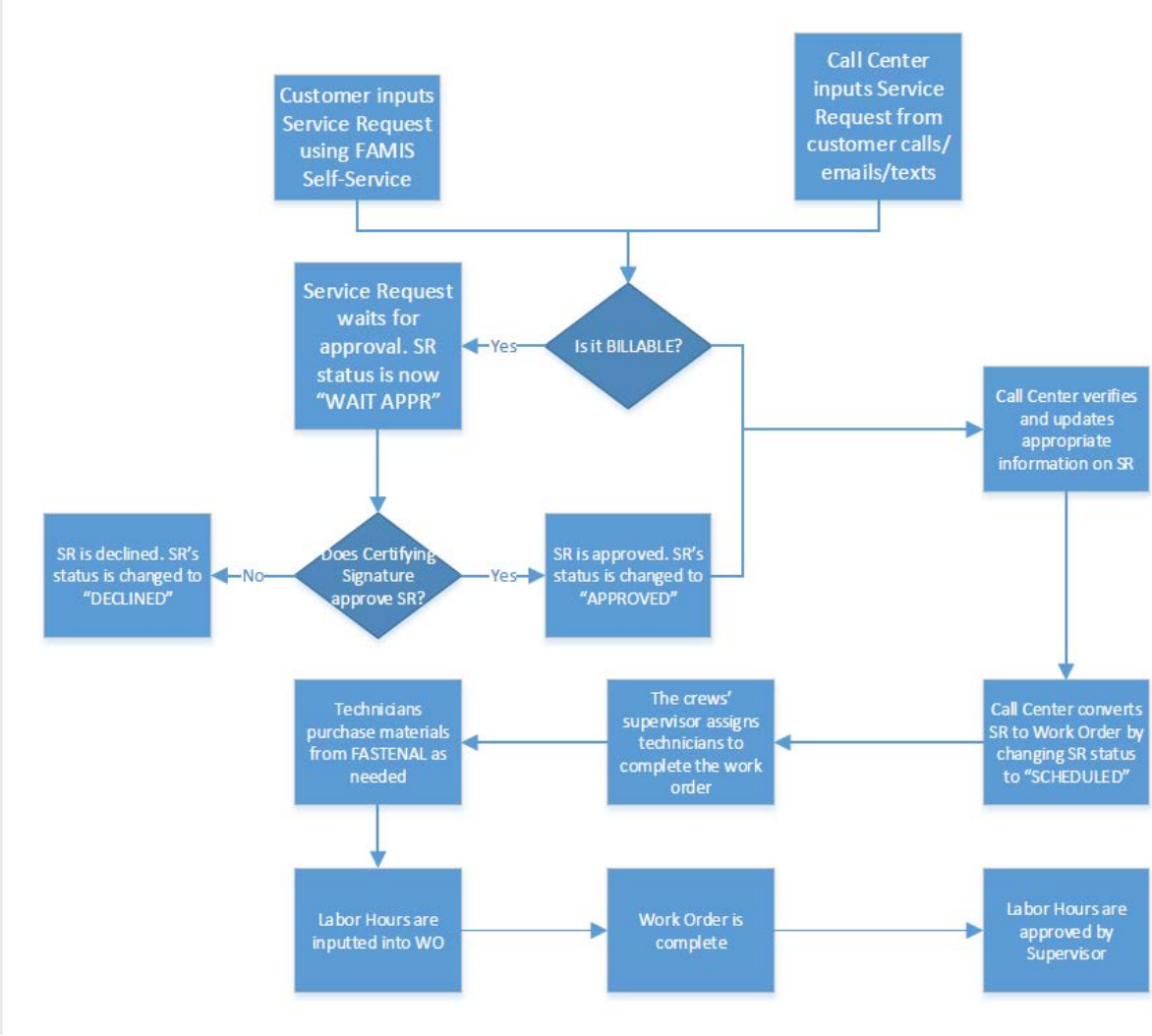
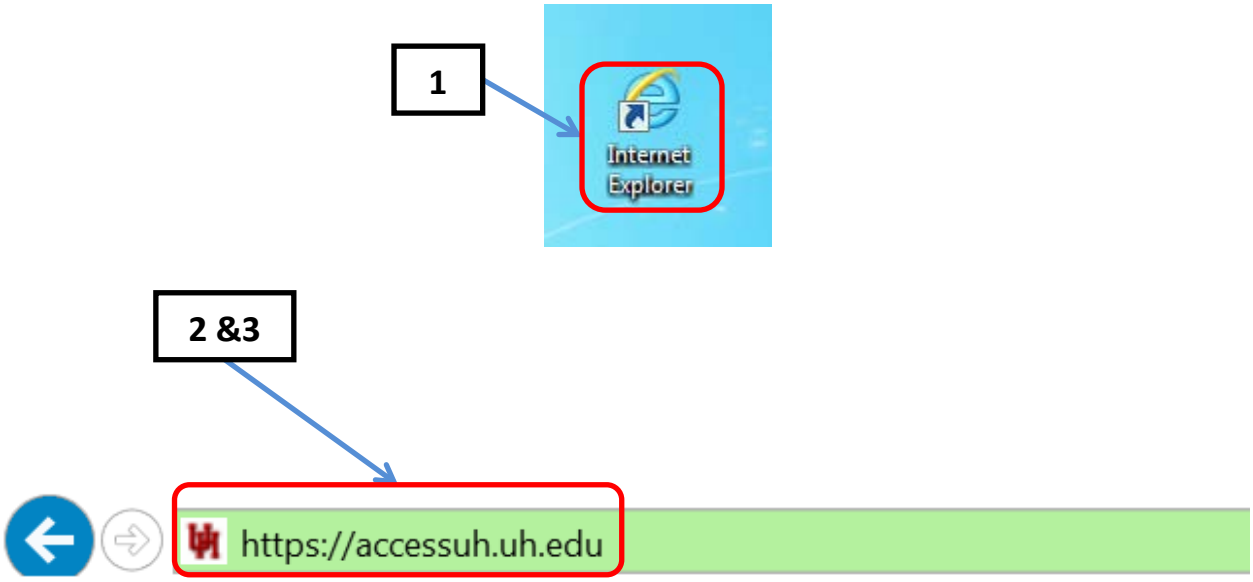


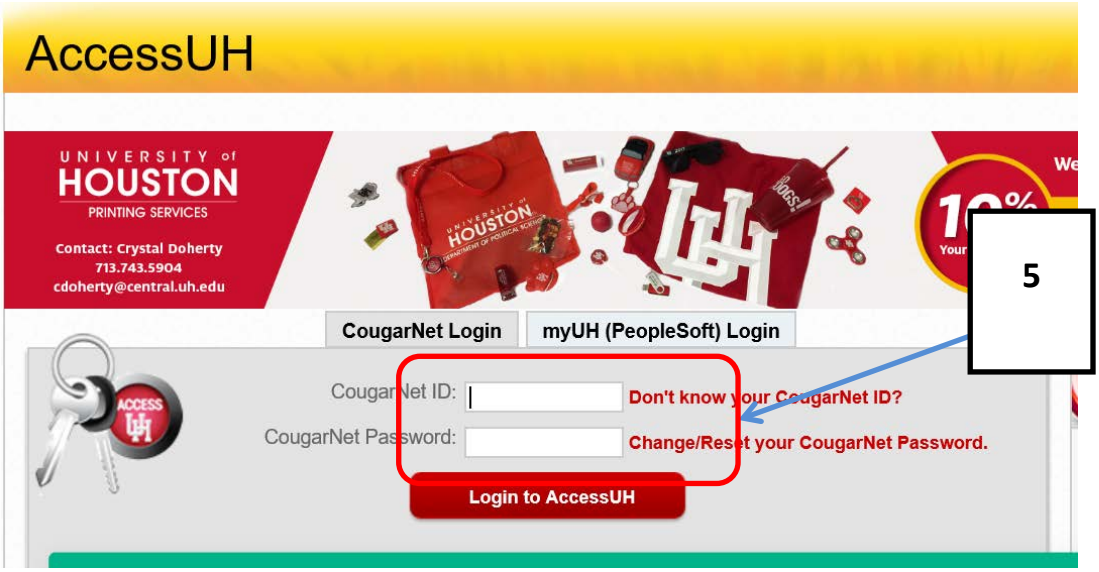
Figure 1 Work Order Workflow

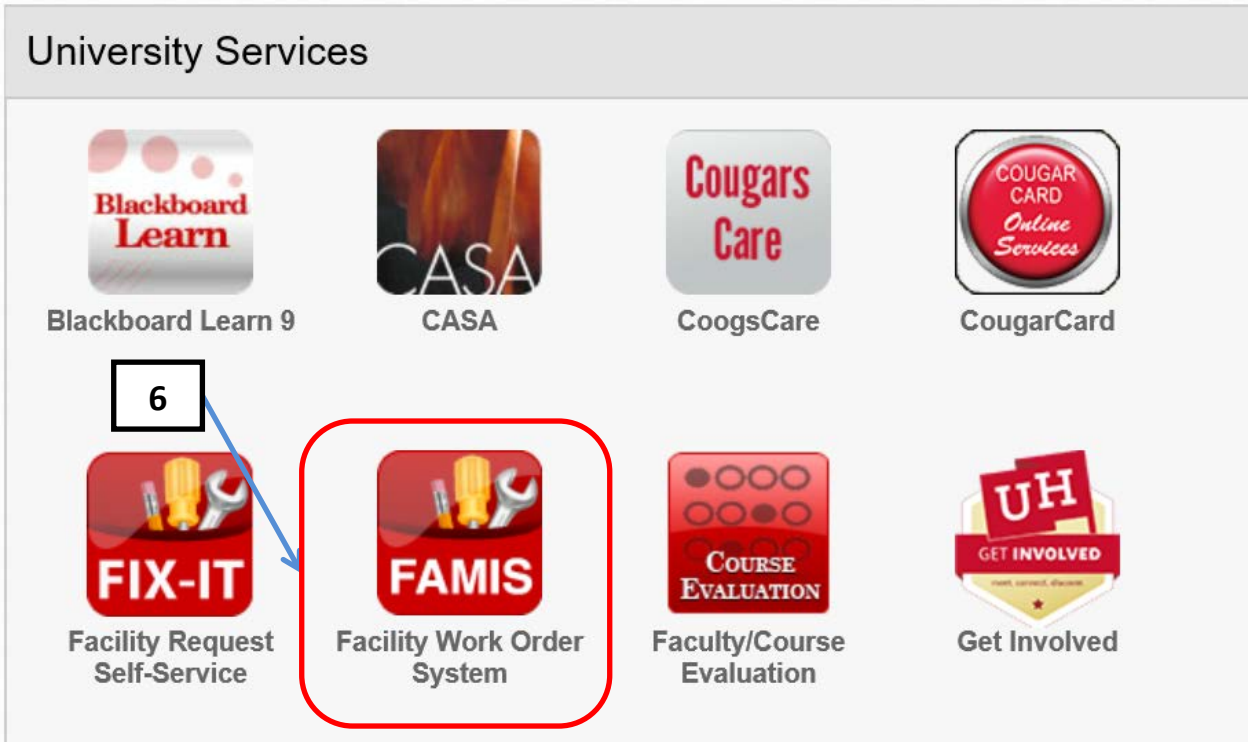
Logging into FAMIS

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:
CougarNet Password:
Don't know your CougarNet ID?
Change/Reset your CougarNet Password.
Login to AccessUH
5

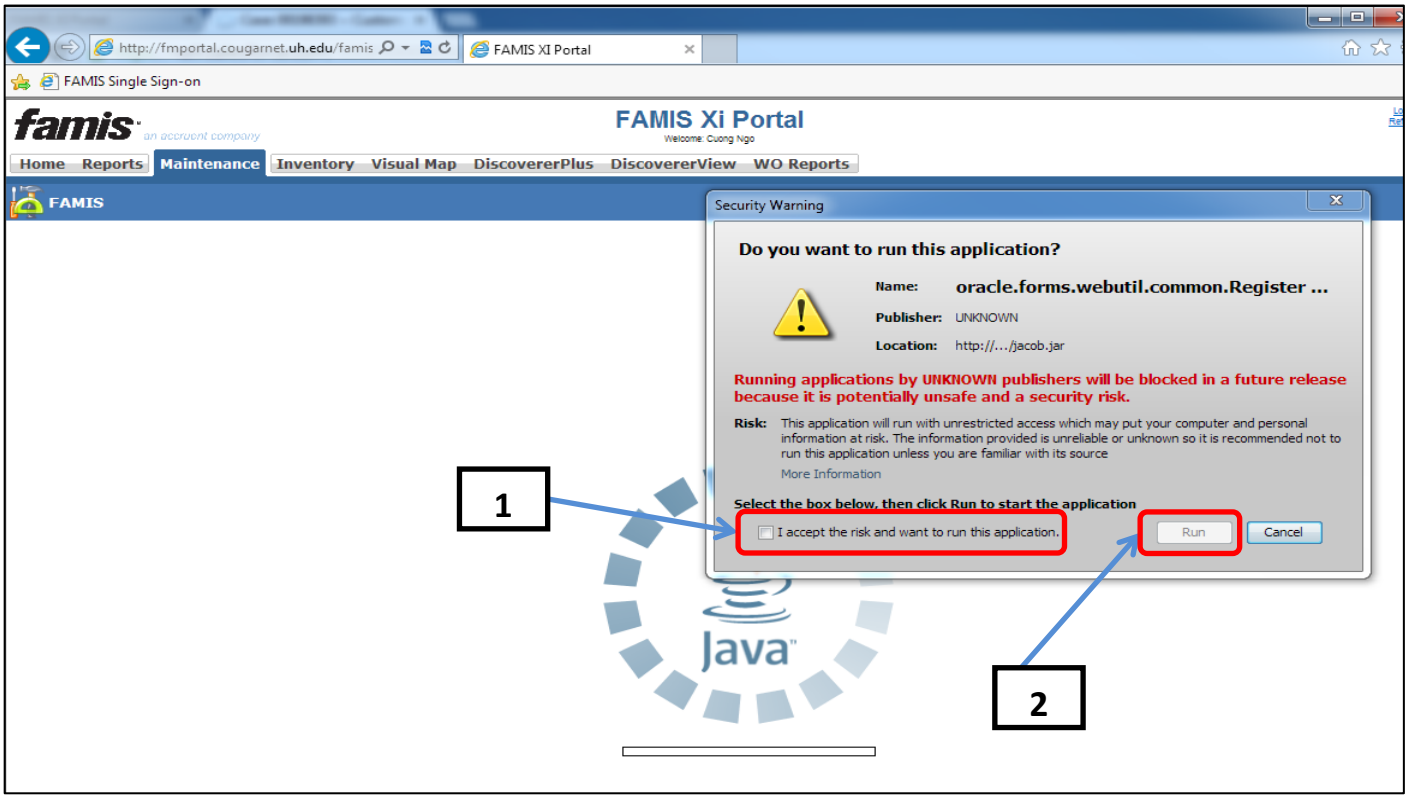

University Services
Blackboard Learn 9
CASA
CoogsCare
CougarCard
6
FIX-IT
Facility Request Self-Service
FAMIS
Facility Work Order System
Course Evaluation
Faculty/Course Evaluation
UH GET INVOLVED
Get Involved

7
famis
Home
FSC
Reports
Portfolio
Maintenance
Inventory

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***

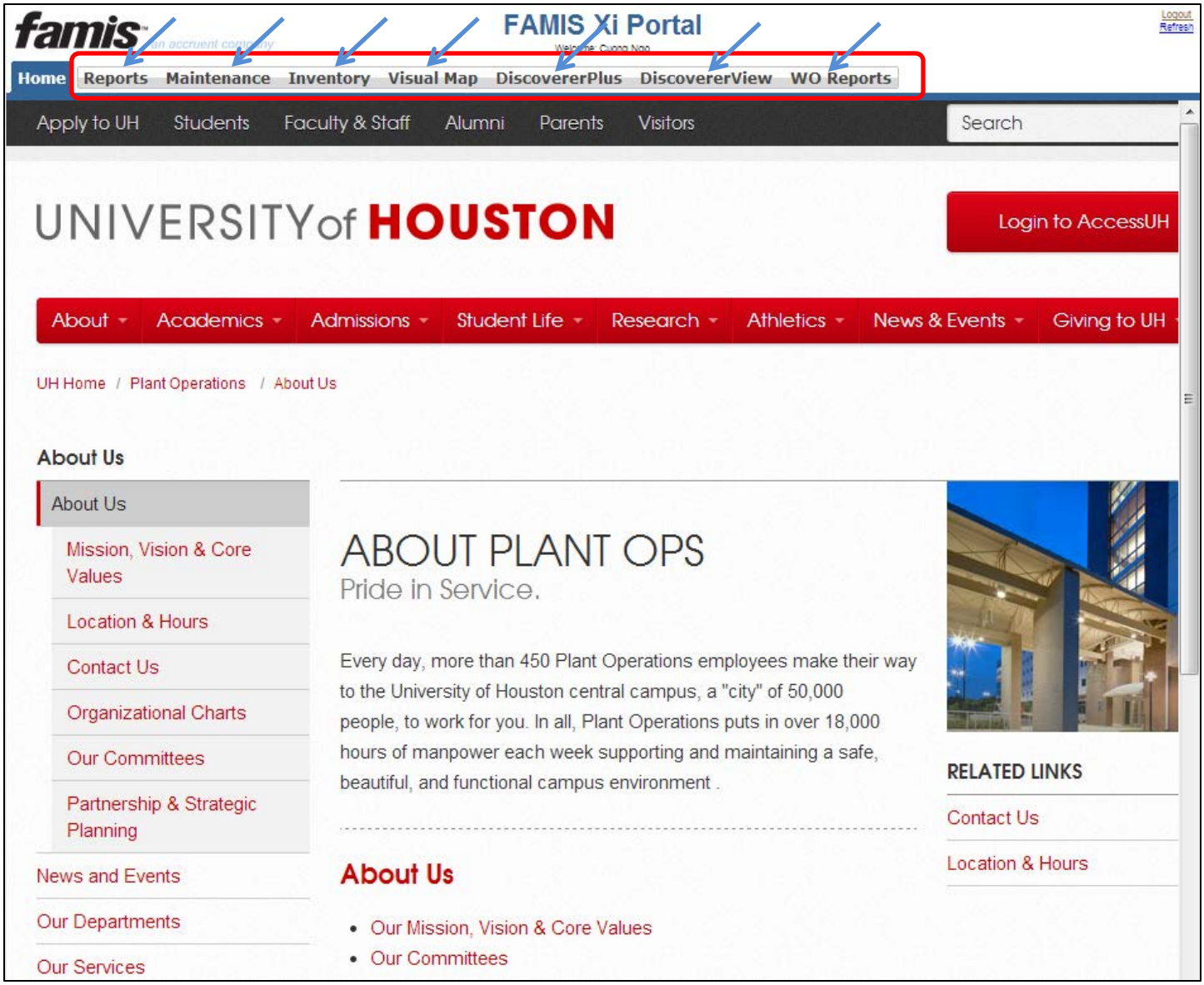


Select a Tab

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:

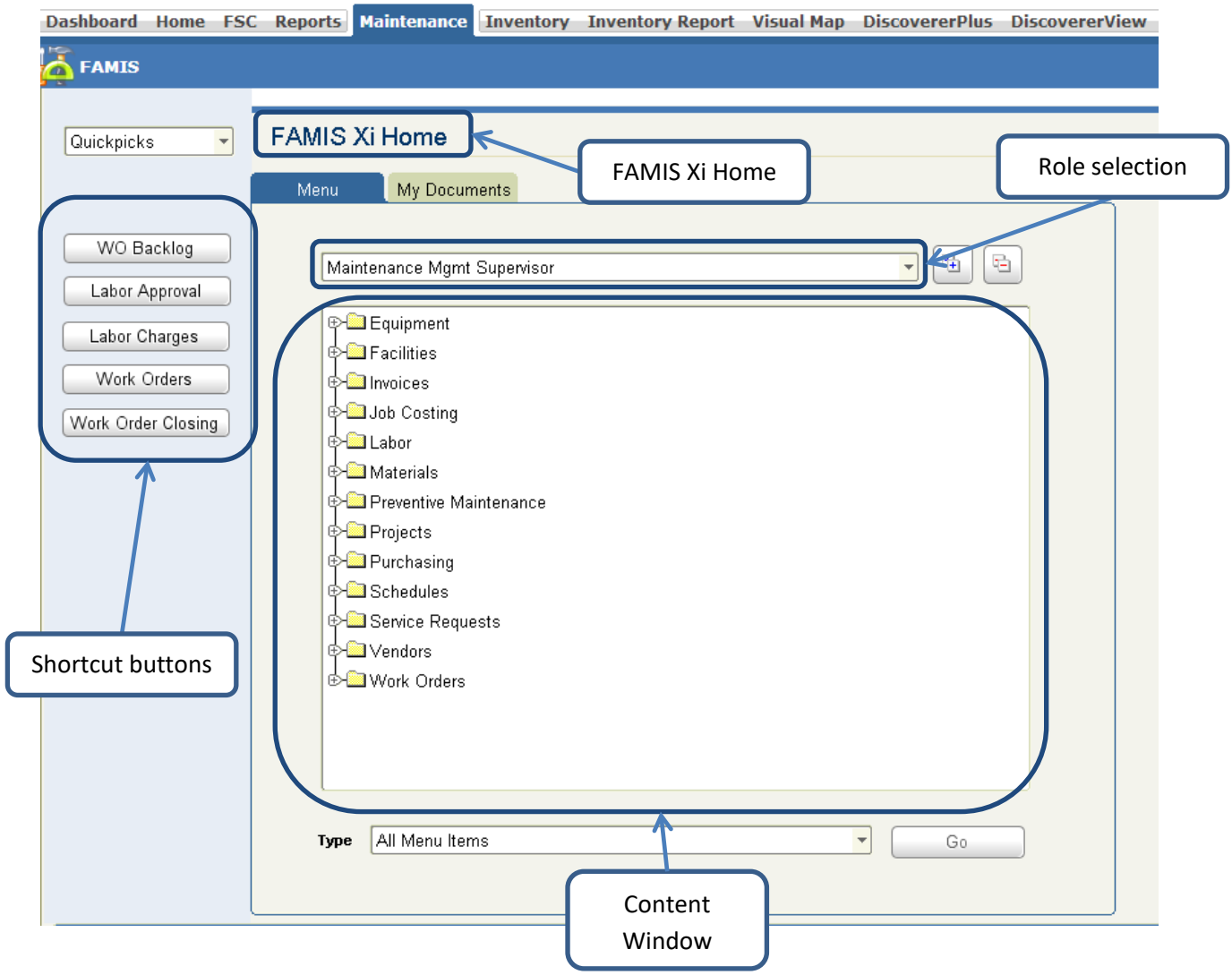


FAMIS Home Screen:

FAMIS Home Screen can be identified by "**FAMIS Xi Home**" right under the tabs

FAMIS Home Screen includes 3 main parts:

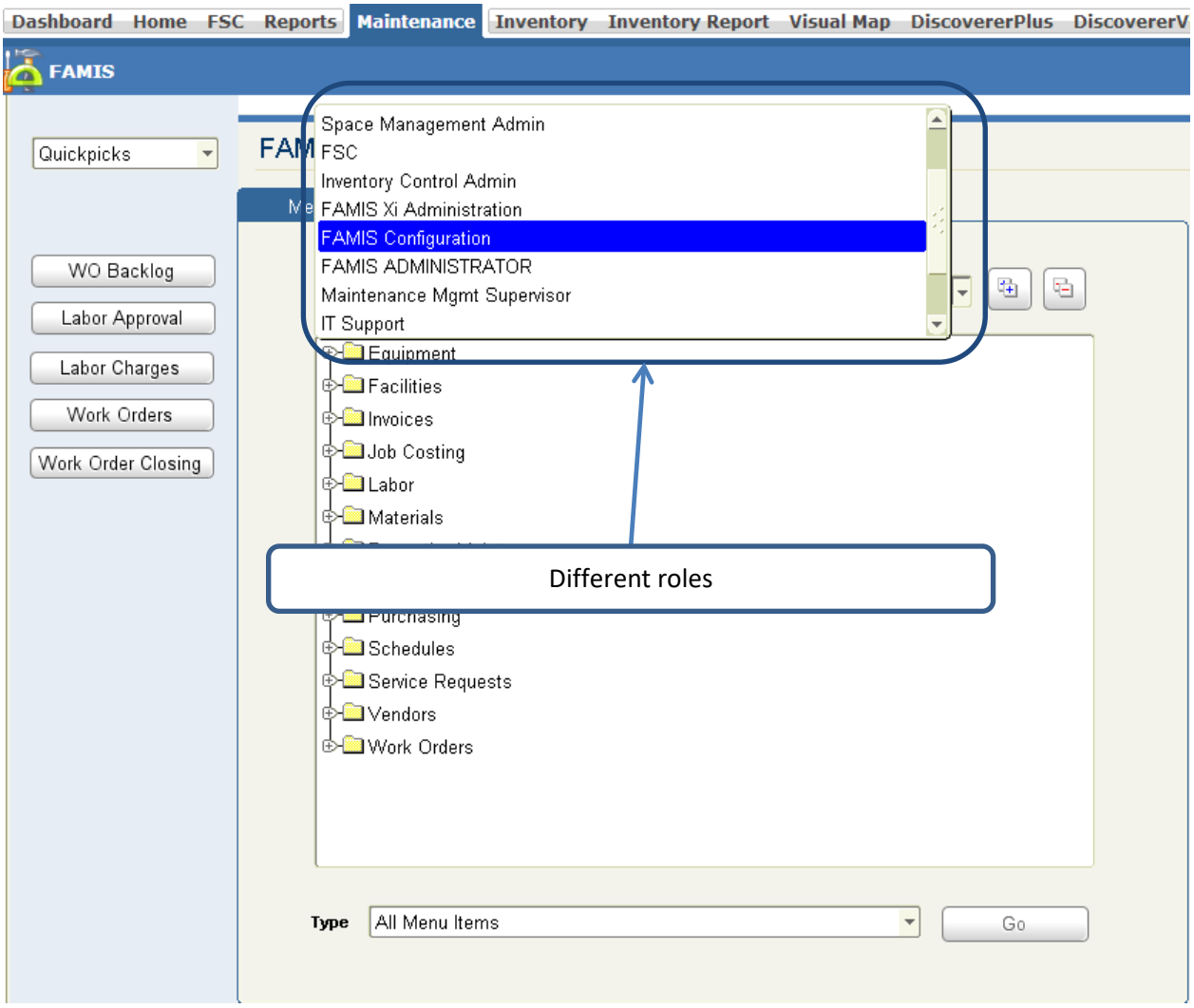
1. **Role selection**
2. **Content window**
3. **Shortcut buttons**


Dashboard
Home
FSC
Reports
Maintenance
Inventory
Inventory Report
Visual Map
DiscovererPlus
DiscovererView
FAMIS
Quickpicks
FAMIS Xi Home
Menu
My Documents
WO Backlog
Labor Approval
Labor Charges
Work Orders
Work Order Closing
Maintenance Mgmt Supervisor
Equipment
Facilities
Invoices
Job Costing
Labor
Materials
Preventive Maintenance
Projects
Purchasing
Schedules
Service Requests
Vendors
Work Orders
Type
All Menu Items
Go
FAMIS Xi Home
Role selection
Shortcut buttons
Content Window

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.



Content Window:

Content Window includes 3 main parts:

Folder

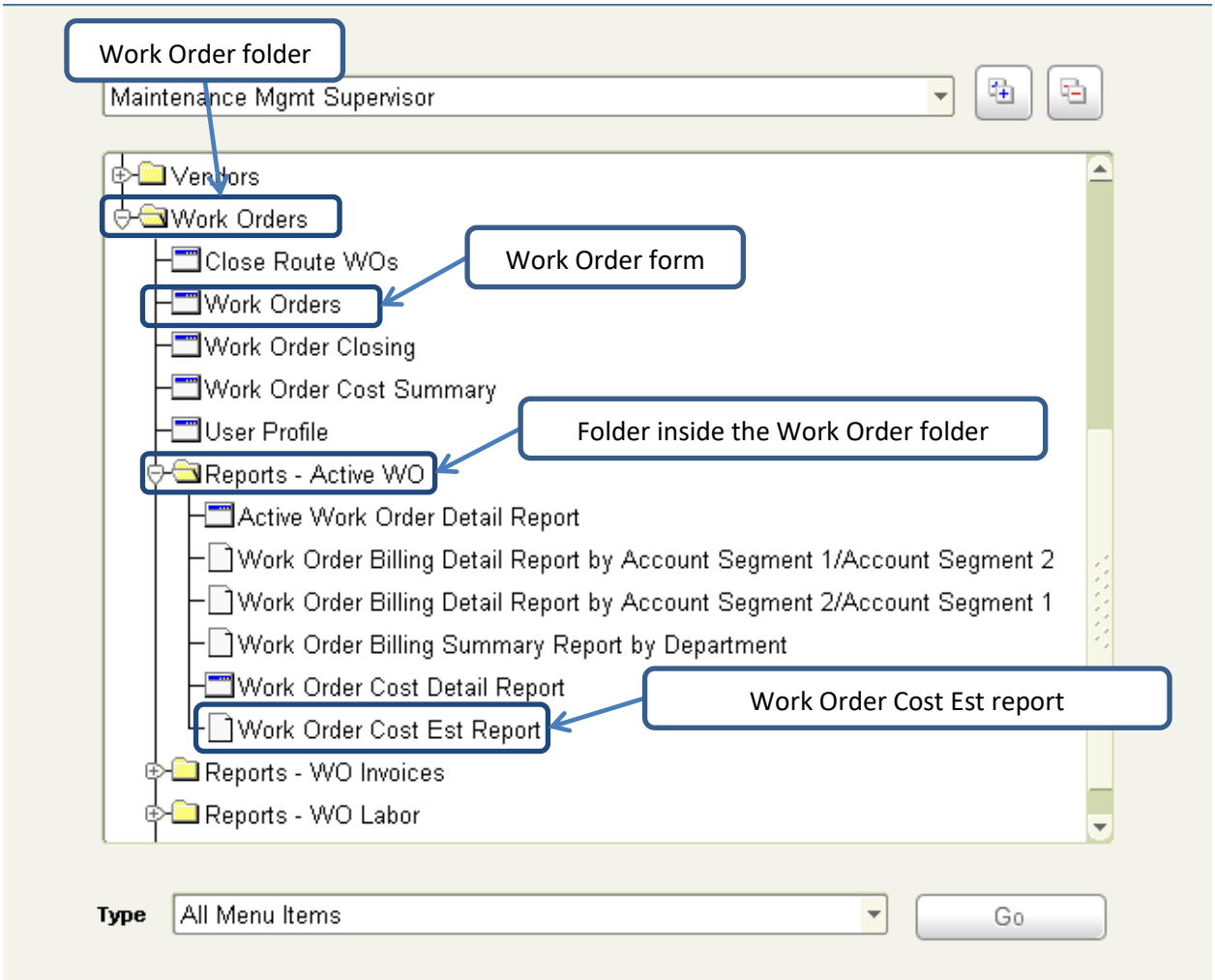
A folder's icon is represented by this symbol . Each folder can be expanded when you click on the "plus sign" on the left of the yellow icon. Each folder has forms and reports that relate to the folder name. For example, the Work Order folder will include Work Order form, Work Order reports, etc.

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

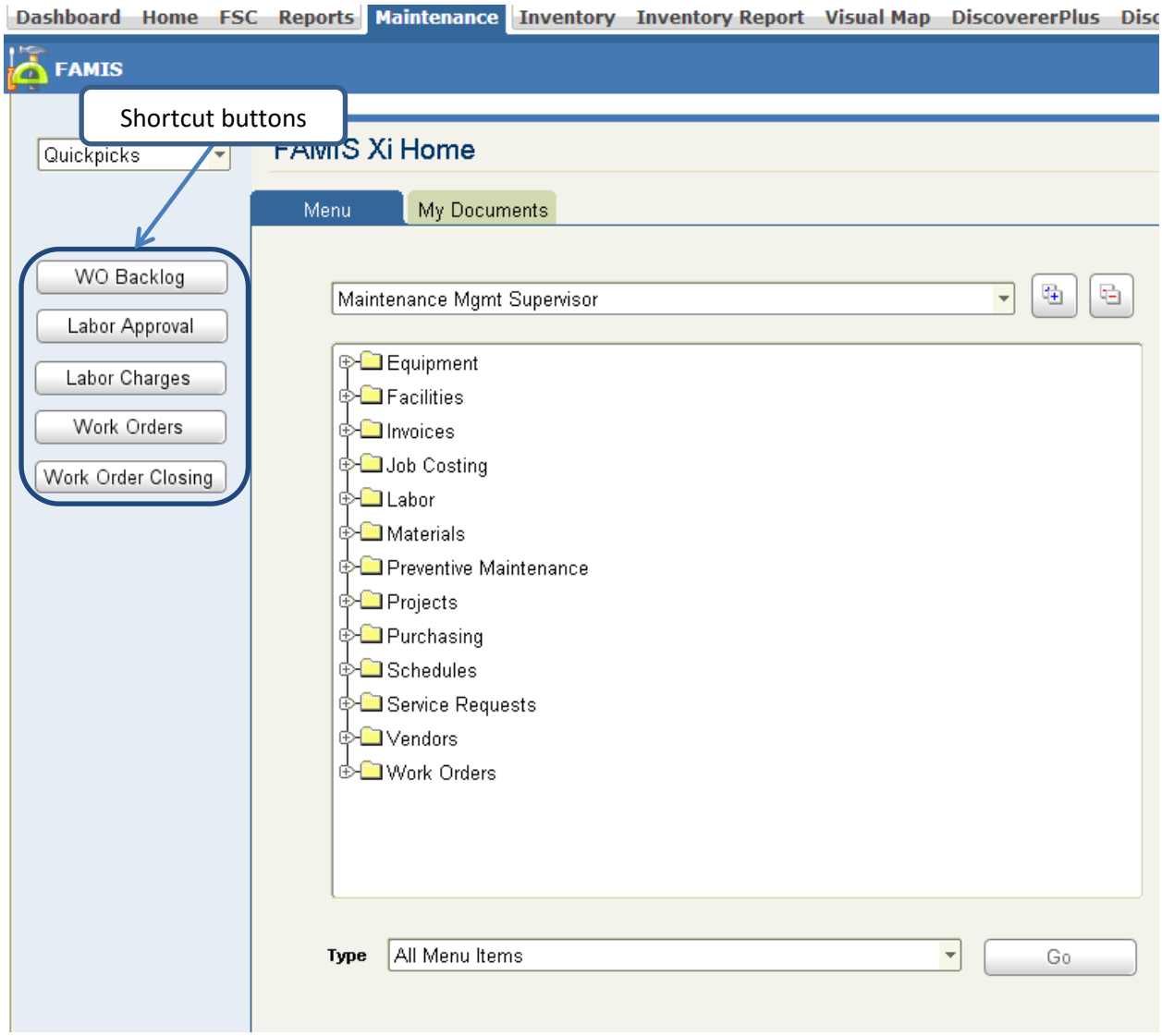
A report's icon is represented by this symbol . Each report will show information related to the name of the report. Double click to the report to open the report.



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.

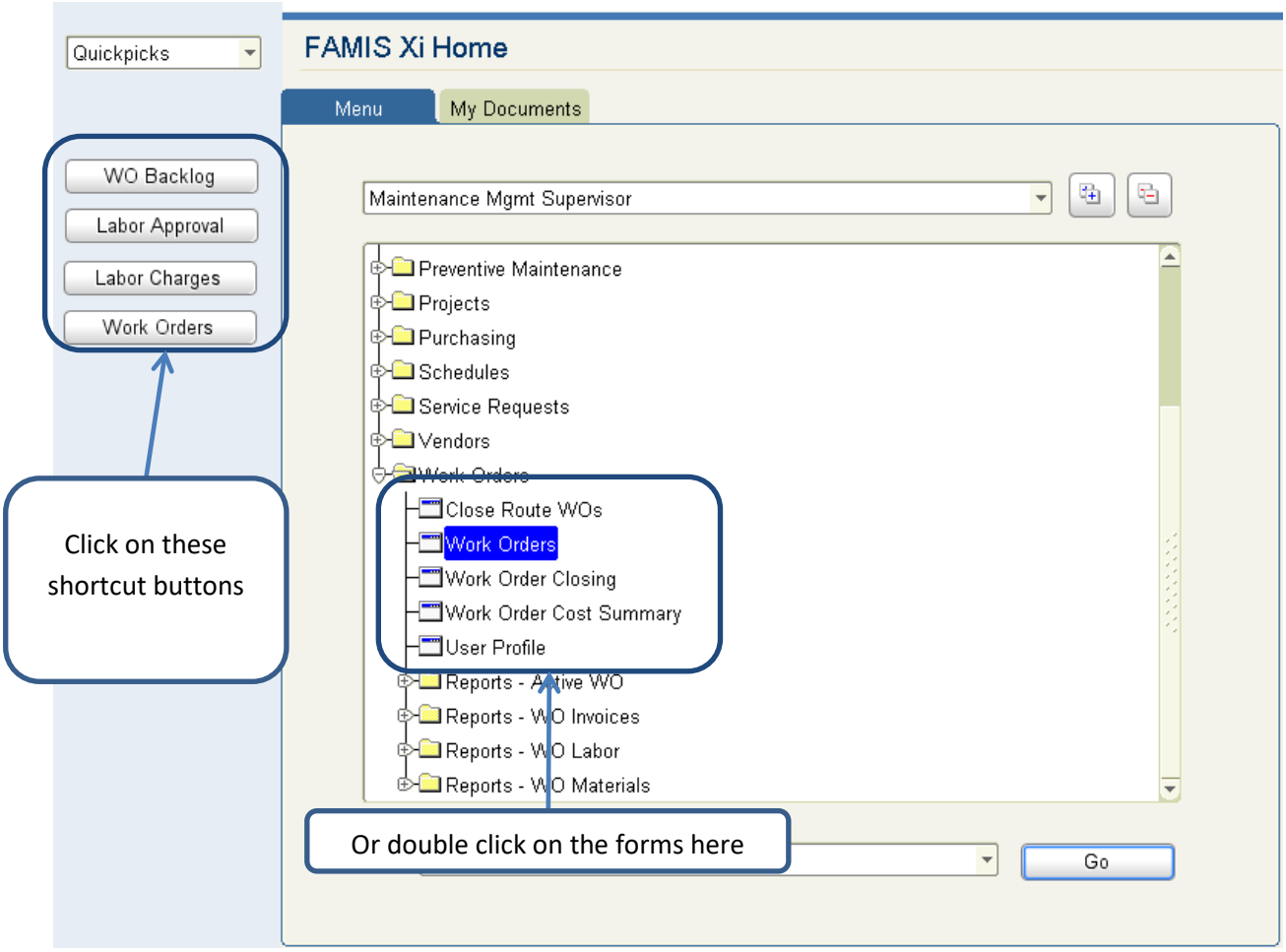
Click on a button to go to that form.



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:



Navigation Bar functions

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

Function	Toolbar Icon	Keyboard Commands	Menu Bar
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:

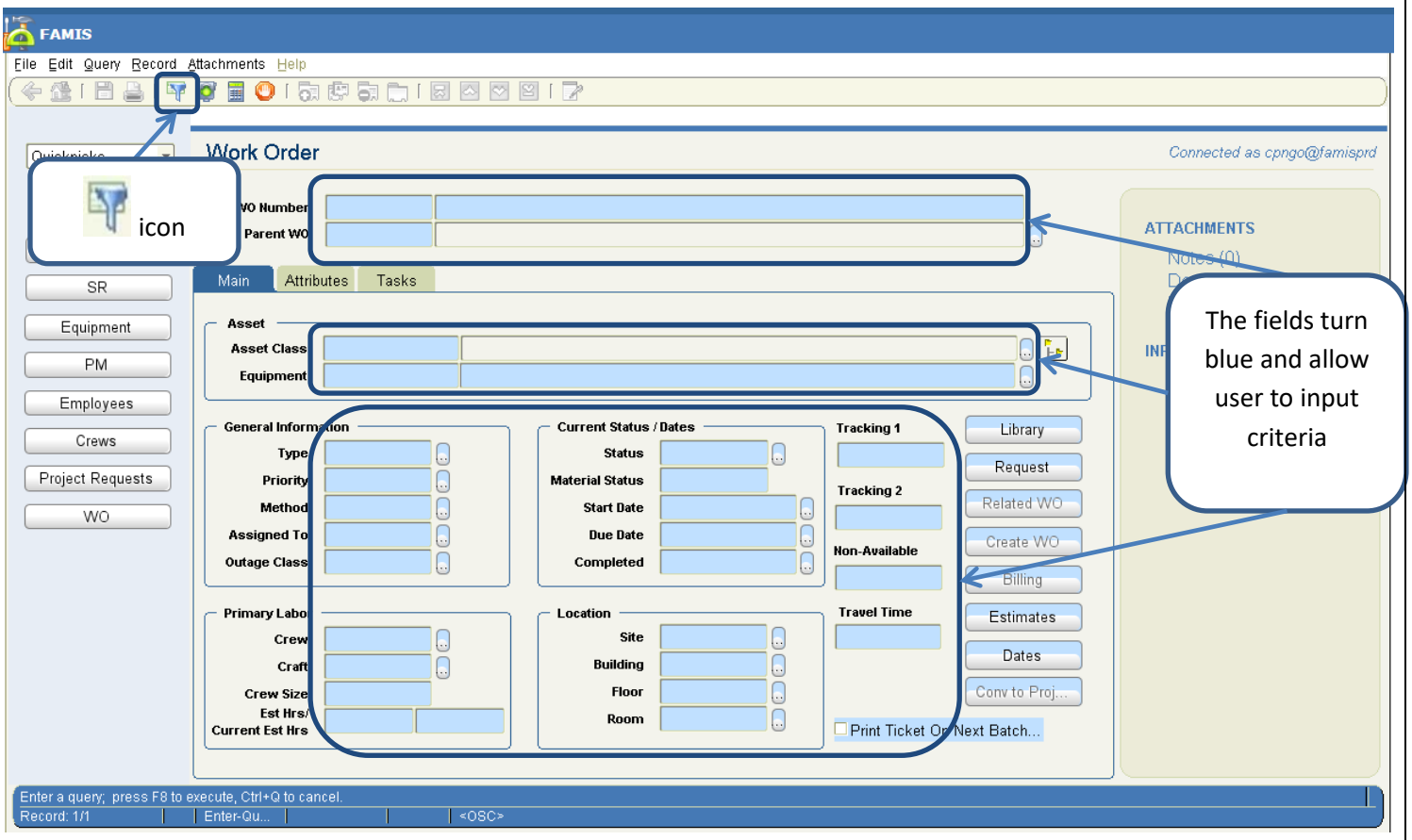
You give criteria	You get
Work Order Number (e.g., WO123456, WO290830)	Work Order detail information, cost information
• Your peoplesoftID = 1234567 • Start date = MON APR 28, 2014	All work orders assigned to employee that have peoplesoftID = 1234567 and the start date is MON APR 28, 2014
• Crew name = 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:

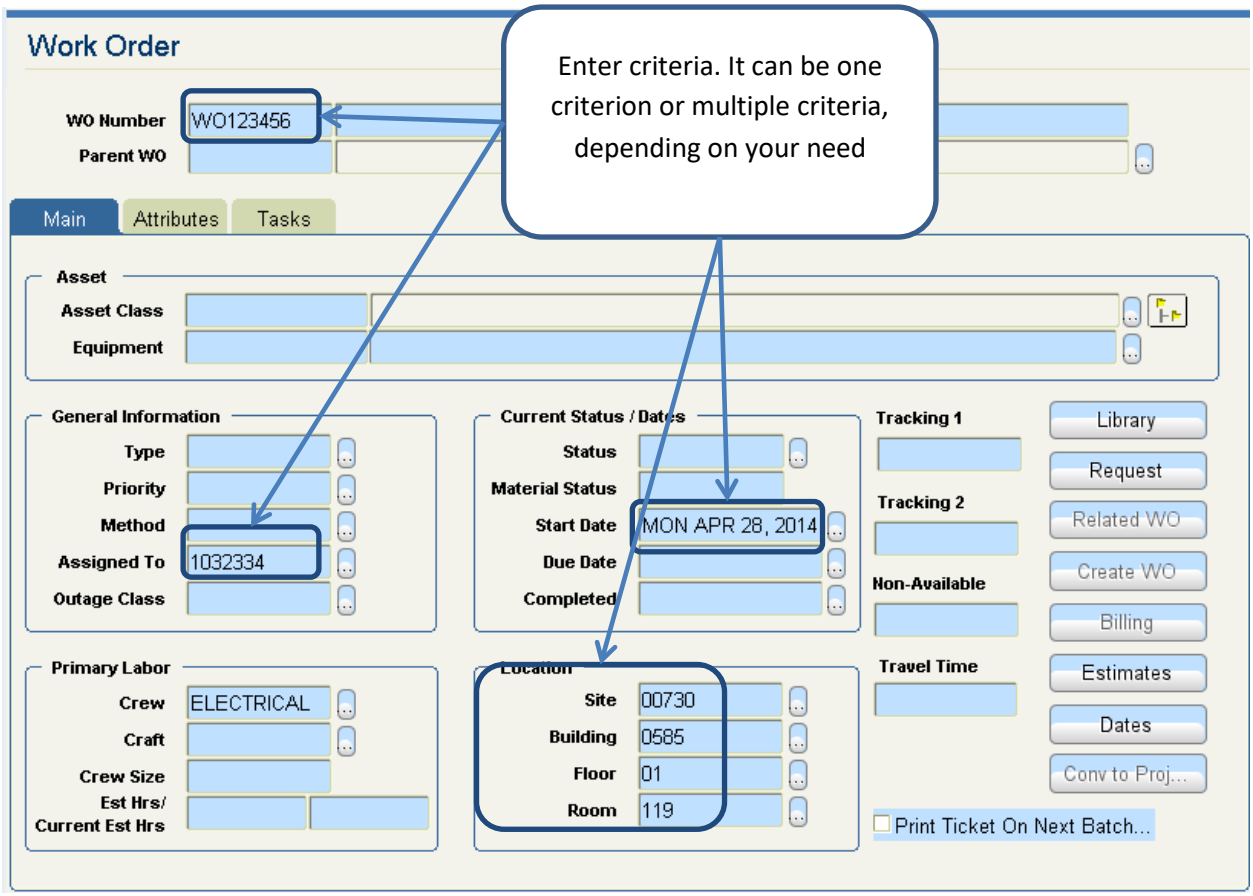
There are two ways to start a search:

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):



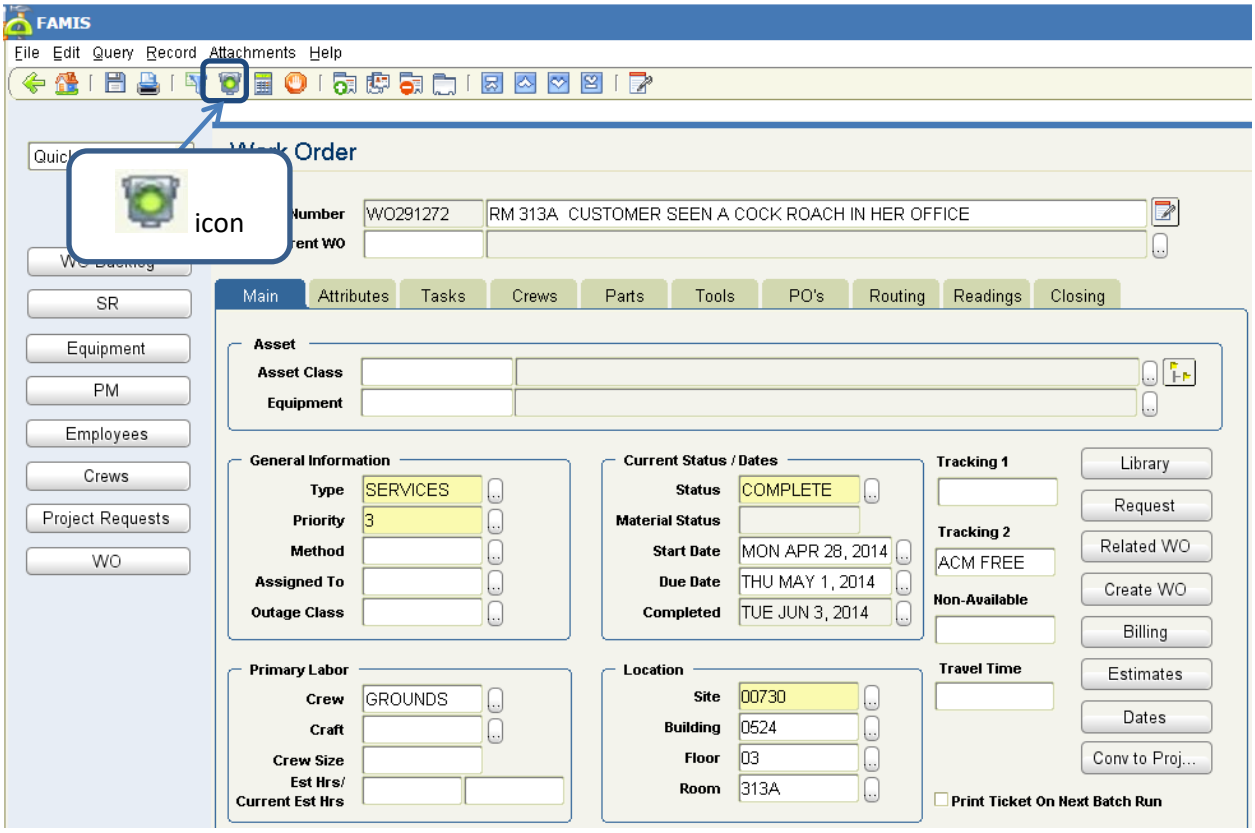
Enter your criteria



Execute your search

There are 2 ways to execute your search:

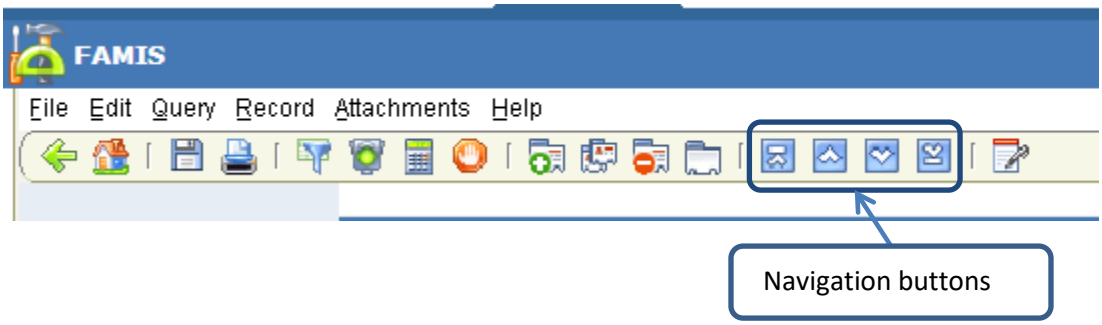
1. Click the icon on the navigation bar
2. Press **F8** on the keyboard



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: **%** .

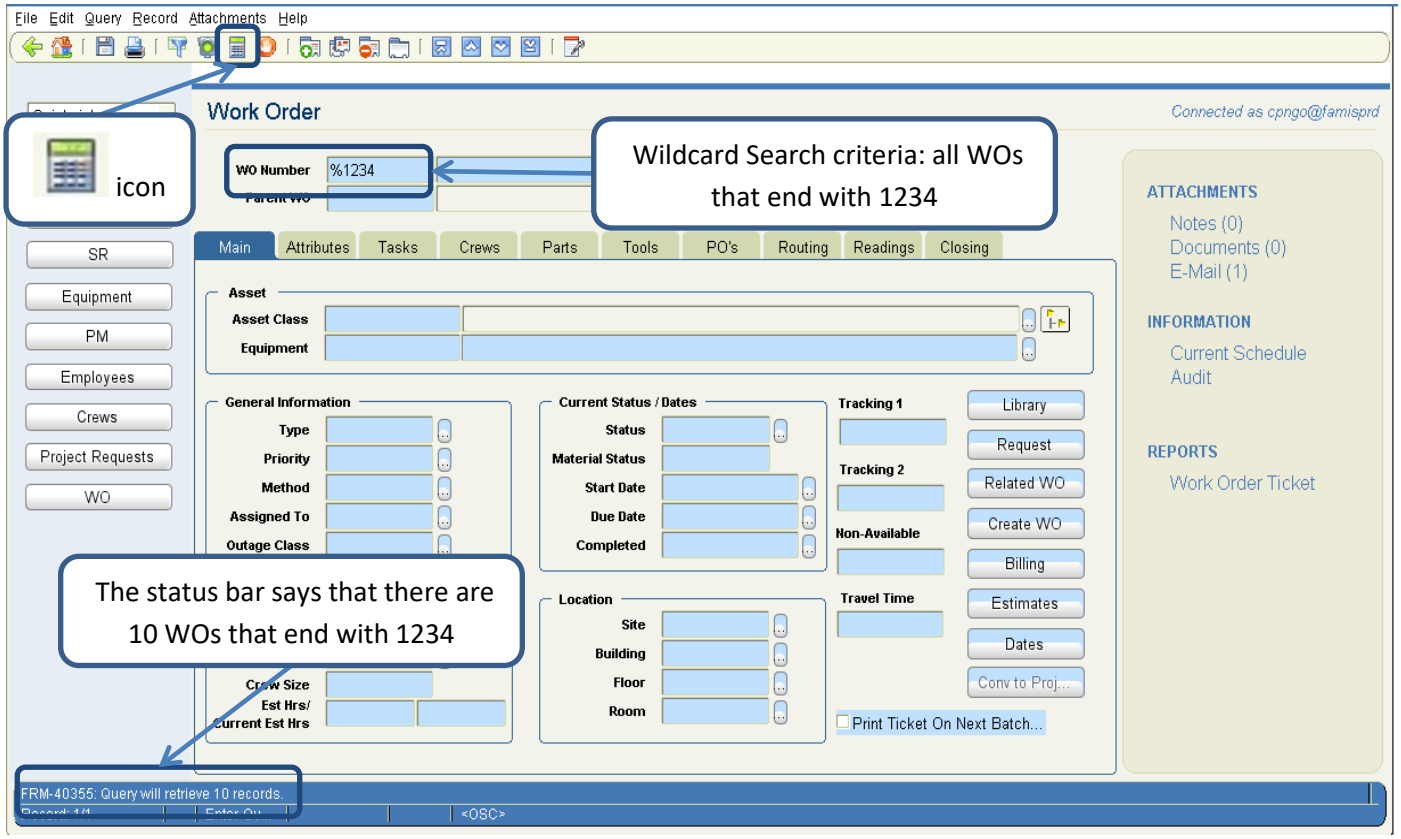
The percent sign will replace any leading or ending missing characters.

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.

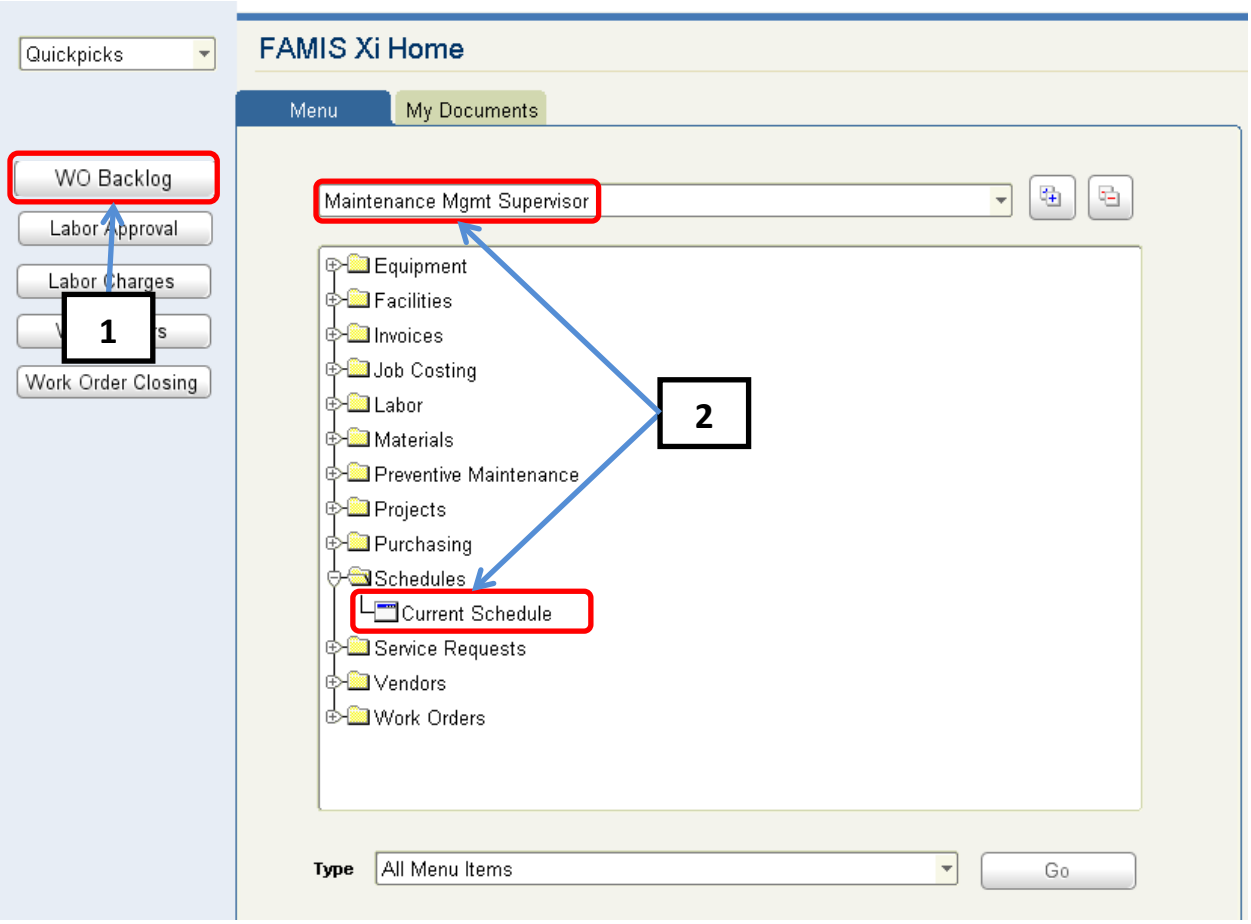
Before clicking on the icon to execute the search, you can click on the icon to count how many results return from the search. The number shows up in the status bar:



Current Schedule Workbench / WO Backlog

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

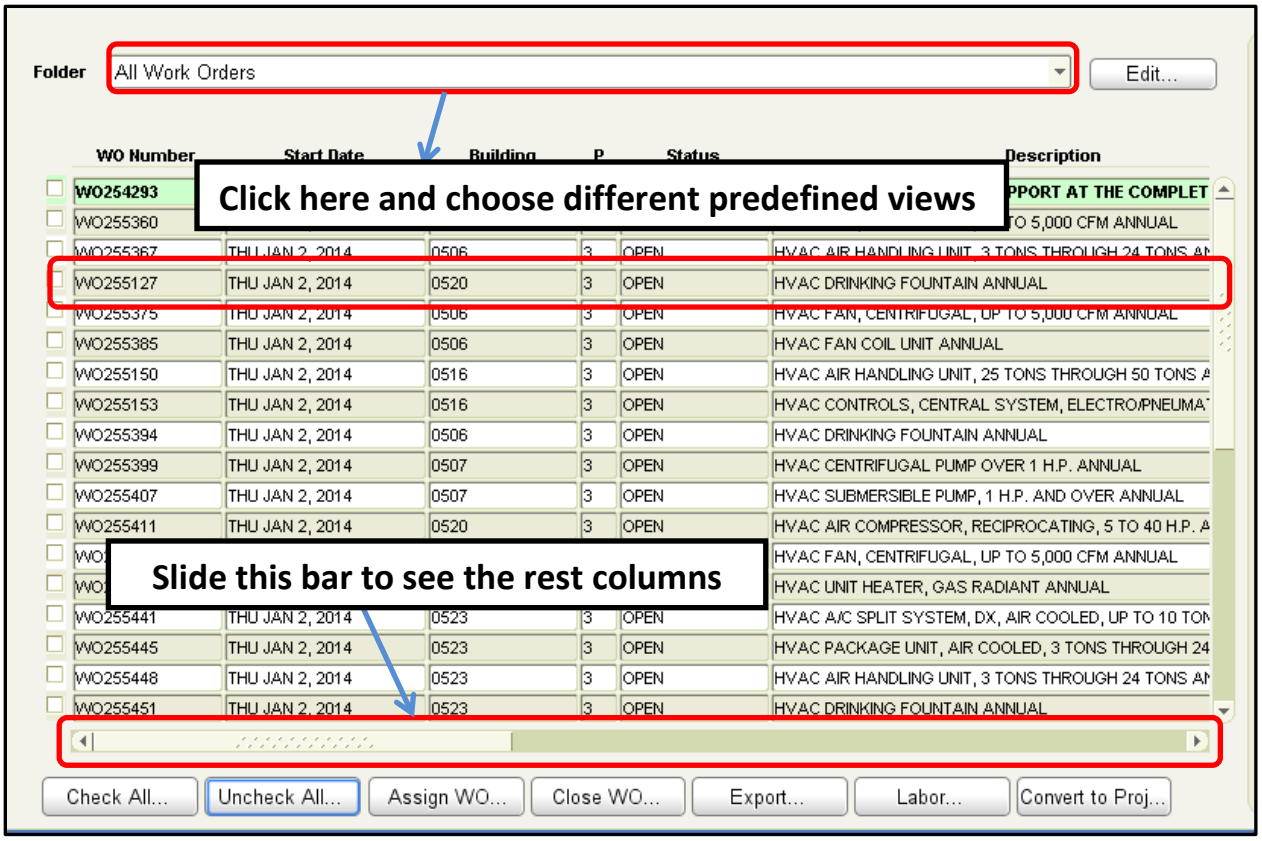
1. Click on **WO Backlog shortcut button** on the left
2. Select **Maintenance Mgmt Supervisor** or **Crew Technician** in the role selection, then Double click **Current Schedule** form under **Schedules** folder



Current Schedule Workbench / WO Backlog Overview

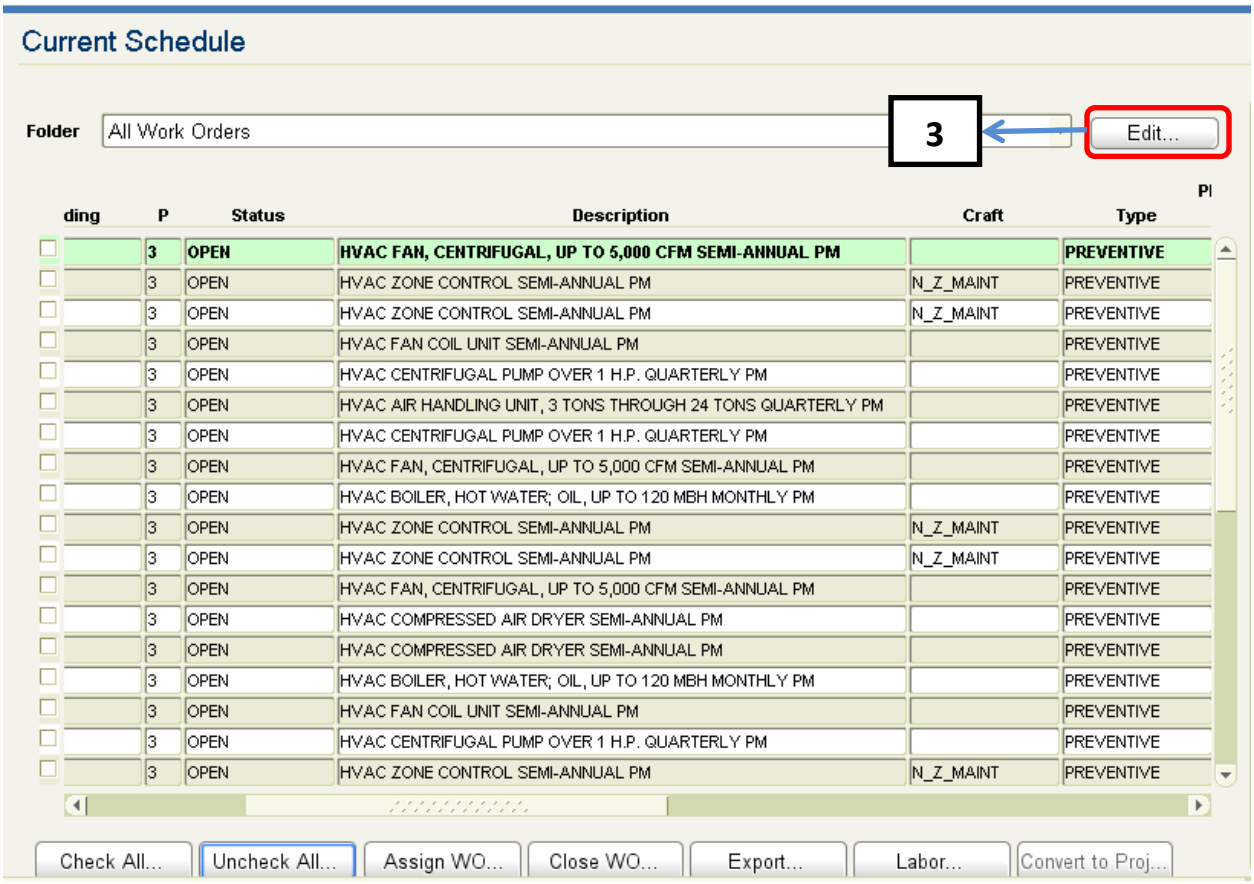
The Schedule Workbench lists all work orders that meet predefined criteria. The lists may be different depend on the filters that we set up. It can be the list of all open work orders for your crew, the list of all work orders that are assigned to yourself, etc.

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.

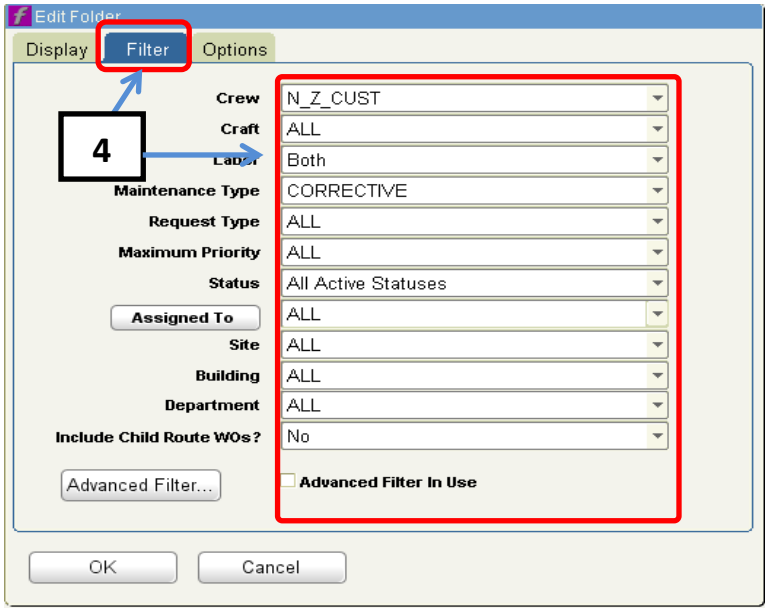


Create custom view

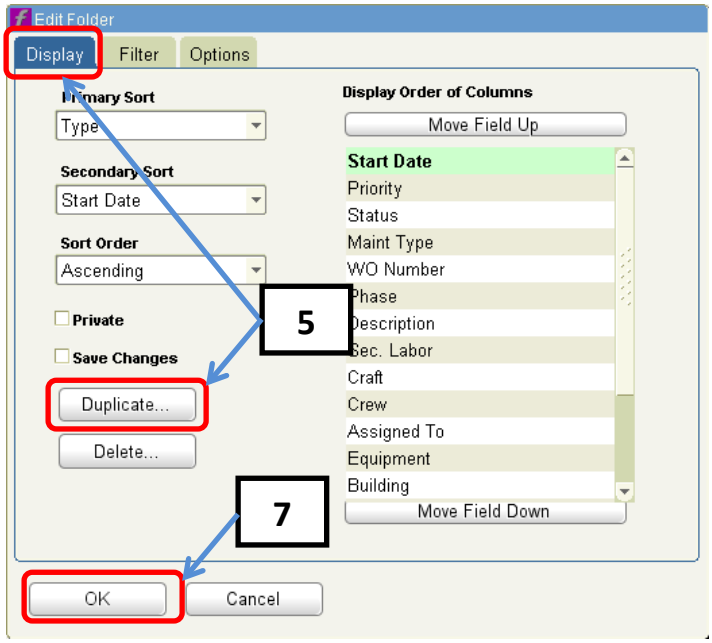
To view work orders that meet specific criteria, click **Edit**

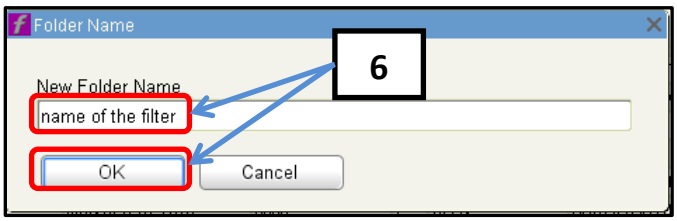


1. Click **Filter**, select desired criteria; you may choose to view work orders that belong to a certain crew, craft, labor type, building, department etc. You may select more than one criteria



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

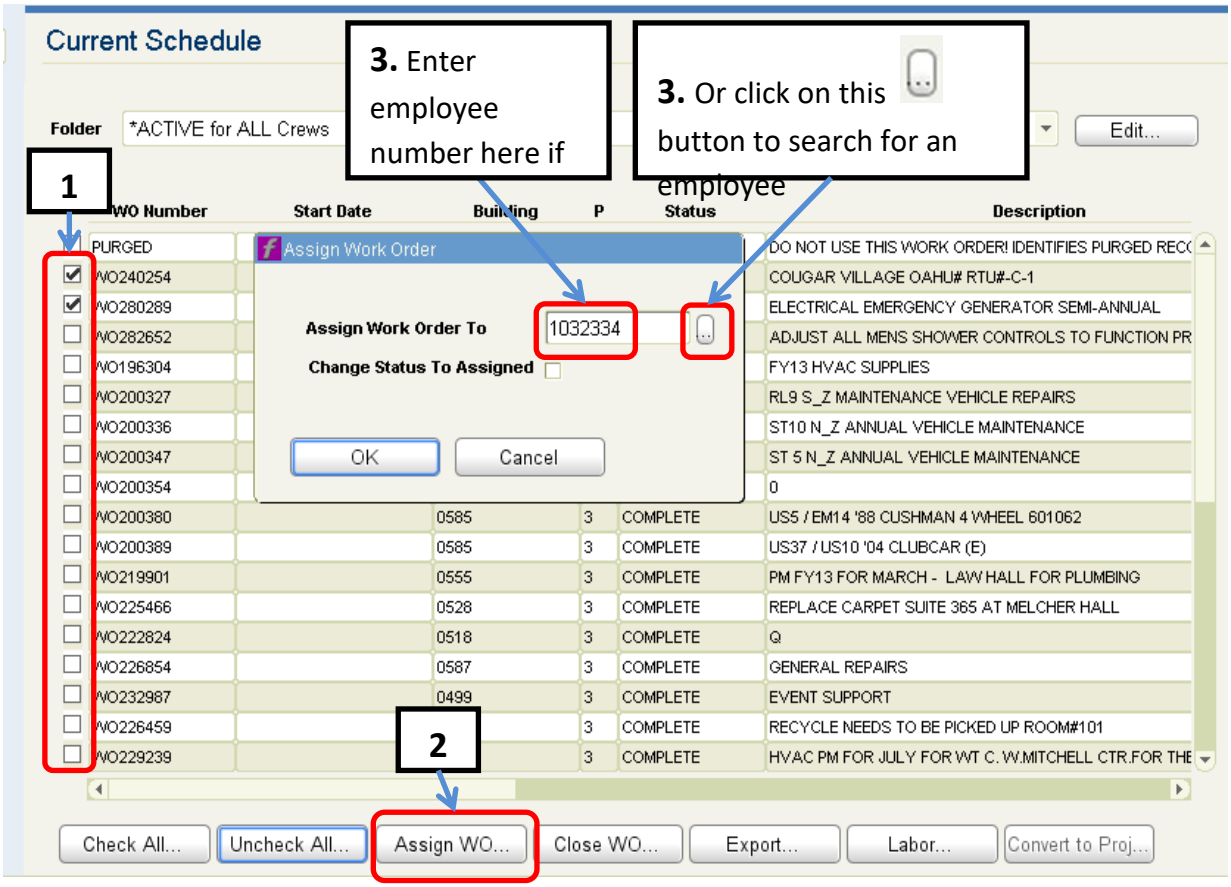


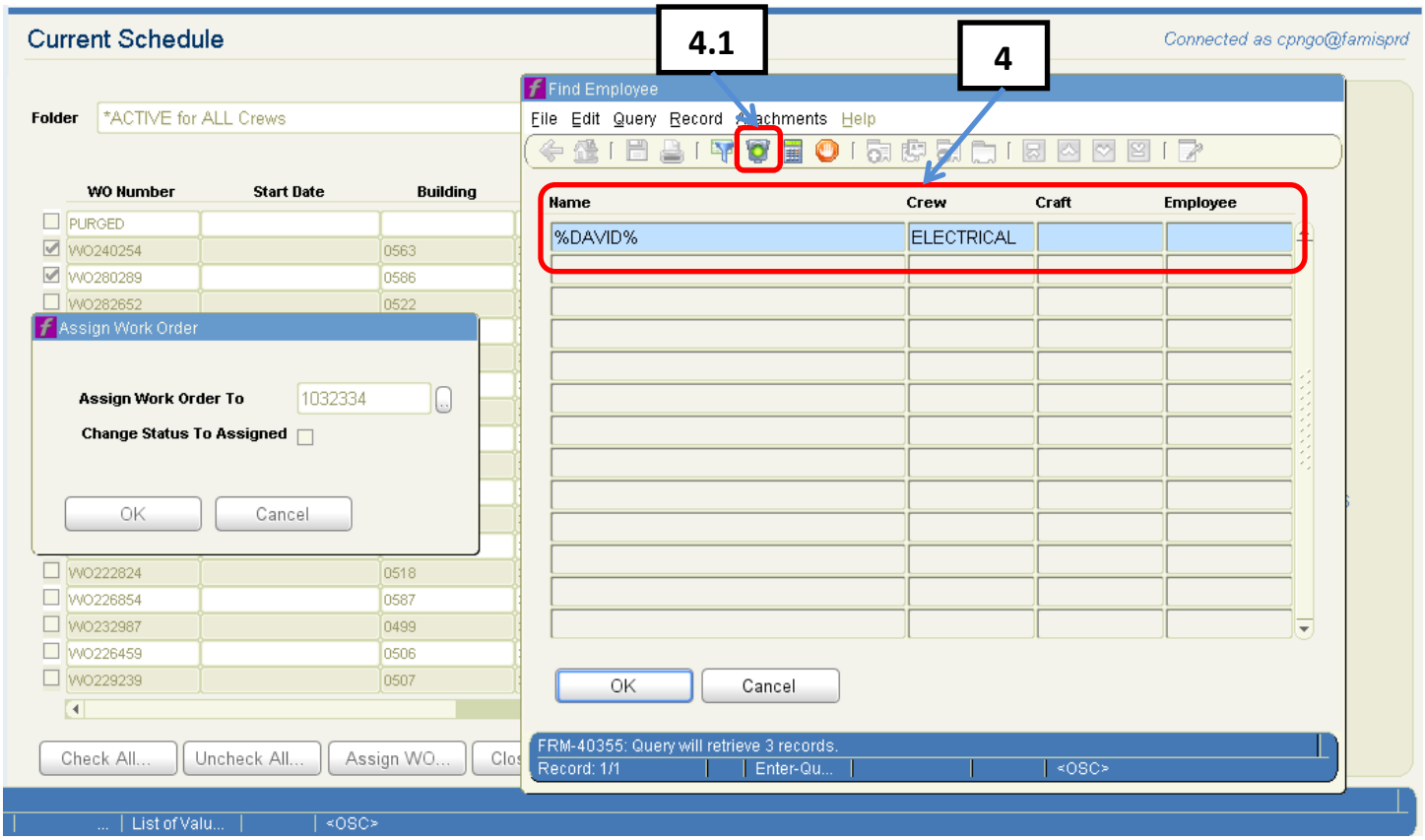


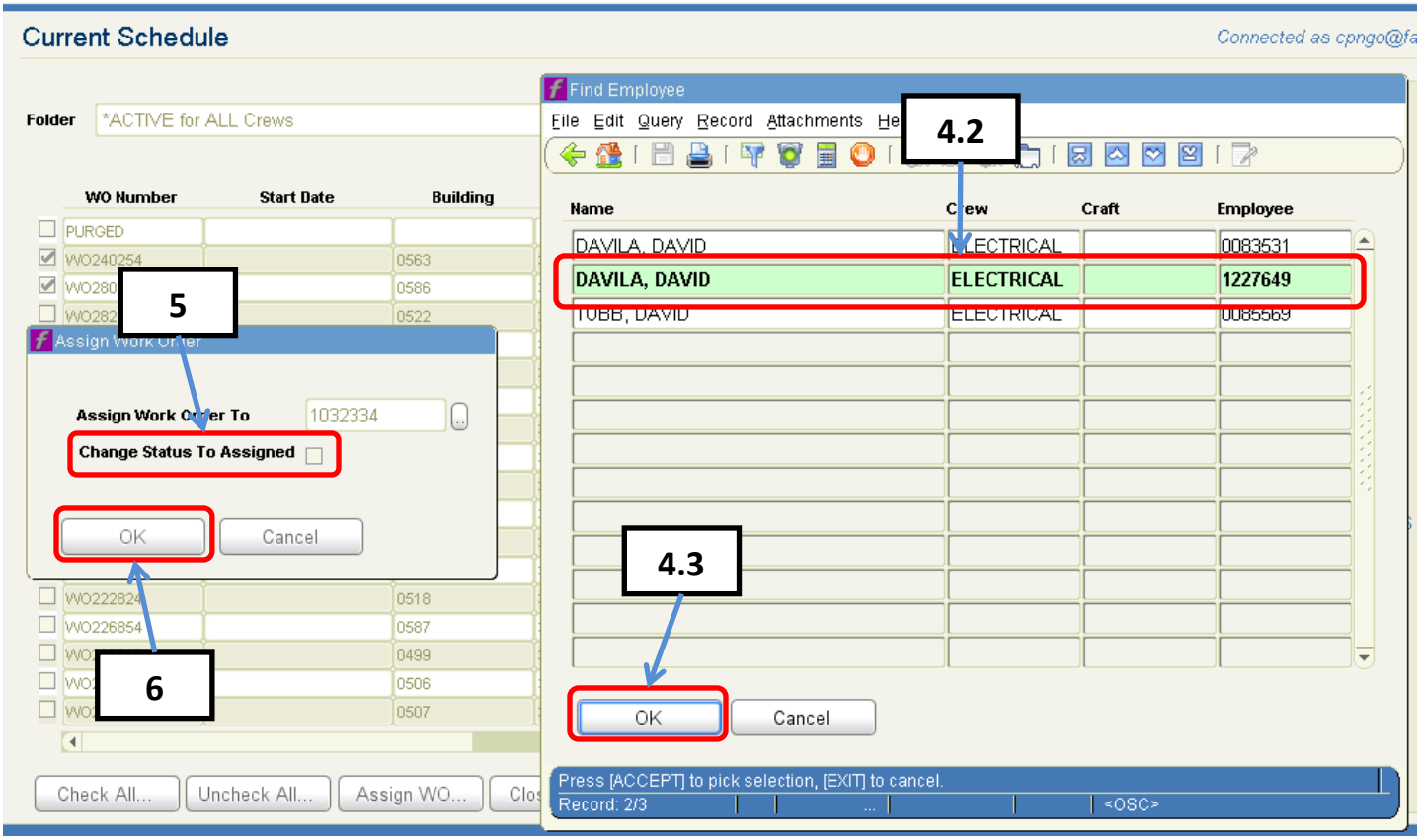
Current Schedule Functionalities

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




Current Schedule
Connected as cpngo@famisprd
4.1
4
Folder
*ACTIVE for ALL Crews
WO Number
Start Date
Building
Find Employee
File Edit Query Record Attachments Help
Name
Crew
Craft
Employee
%DAVID%
ELECTRICAL
OK
Cancel
Assign Work Order
Assign Work Order To
1032334
Change Status To Assigned
OK
Cancel
FRM-40355: Query will retrieve 3 records.
Record: 1/1
Enter-Qu...
<OSC>
Check All...
Uncheck All...
Assign WO...
List of Valu...


Current Schedule
Connected as cpngo@fa
Folder
*ACTIVE for ALL Crews
WO Number
Start Date
Building
Find Employee
File Edit Query Record Attachments He
4.2
Name
Crew
Craft
Employee
DAVILA, DAVID
ELECTRICAL
0083531
DAVILA, DAVID
ELECTRICAL
1227649
TOBB, DAVID
ELECTRICAL
0085569
5
Assign Work Order
Assign Work Order To
1032334
Change Status To Assigned
OK
Cancel
4.3
6
OK
Cancel
Press [ACCEPT] to pick selection, [EXIT] to cancel.
Record: 2/3
<OSC>
Check All...
Uncheck All...
Assign WO...

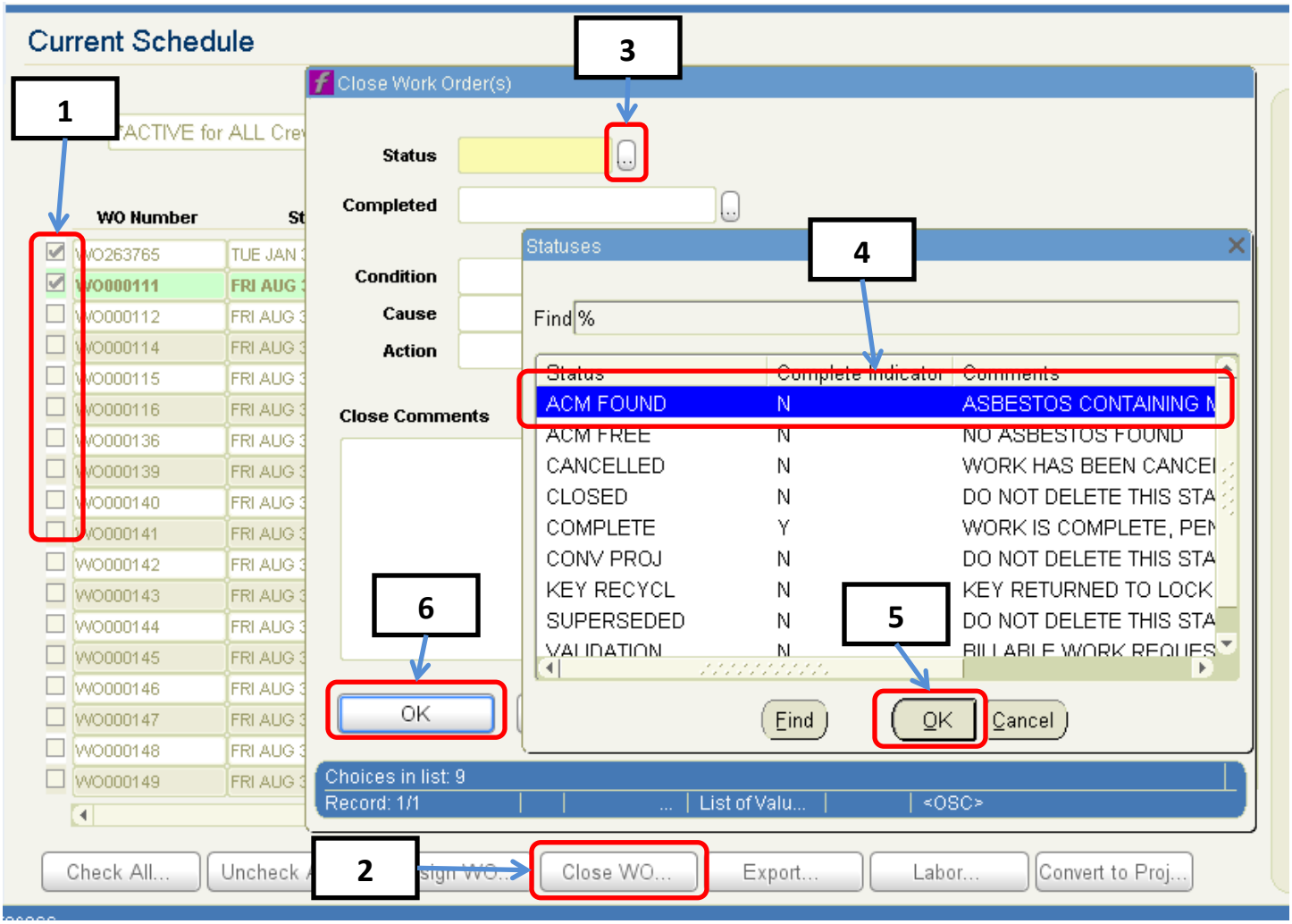
Mass Closing Work Orders

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

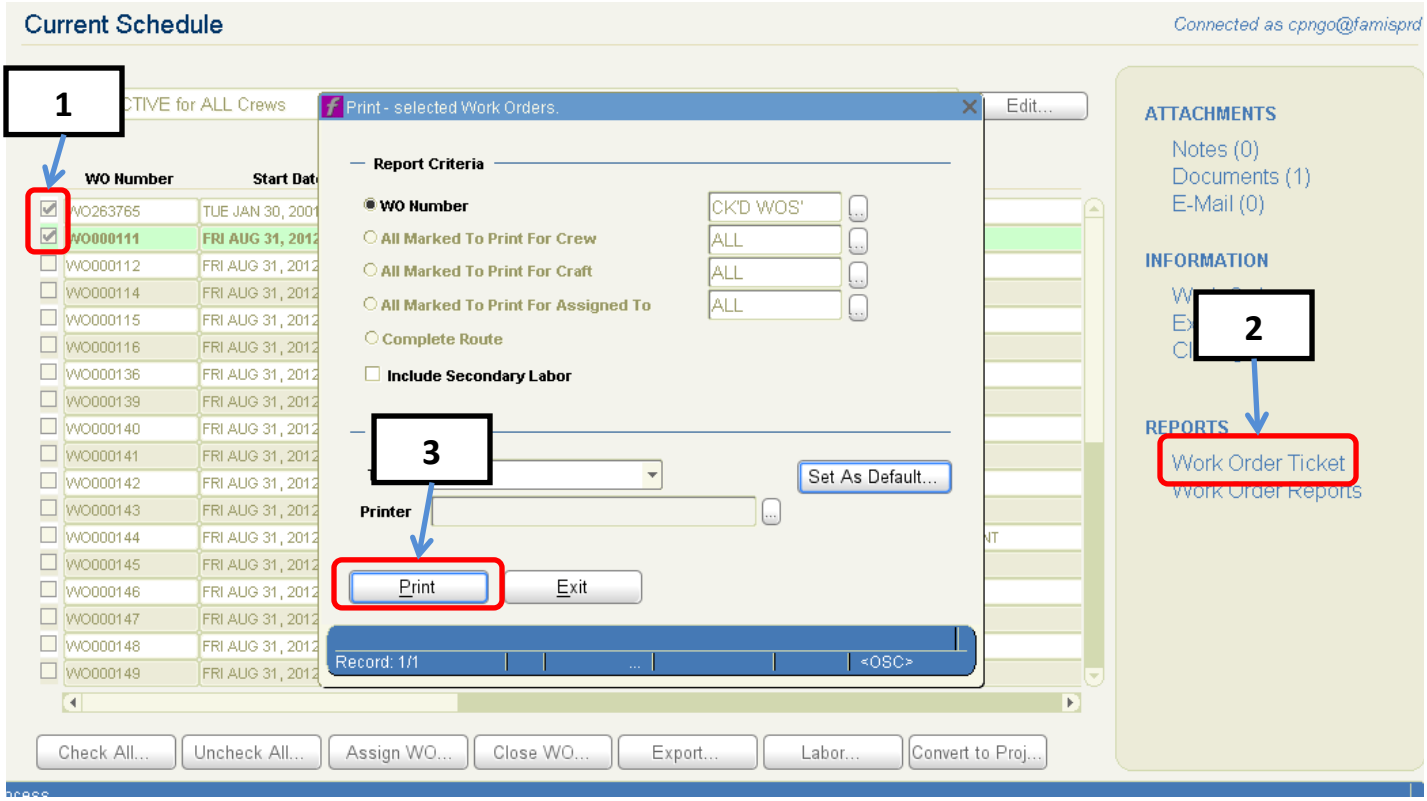
Here is the list of Work Order statuses available in FAMIS and their definitions.

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
1
2
3
4
5
6
Close Work Order(s)
Status
Completed
Condition
Cause
Action
Close Comments
OK
Statuses
Find %
Status
Complete Indicator
Comments
ACM FOUND N ASBESTOS CONTAINING
ACM FREE N NO ASBESTOS FOUND
CANCELLED N WORK HAS BEEN CANCEL
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
Find
OK
Cancel
Choices in list: 9
Record: 1/1
List of Valu...
<OSC>
WO Number
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

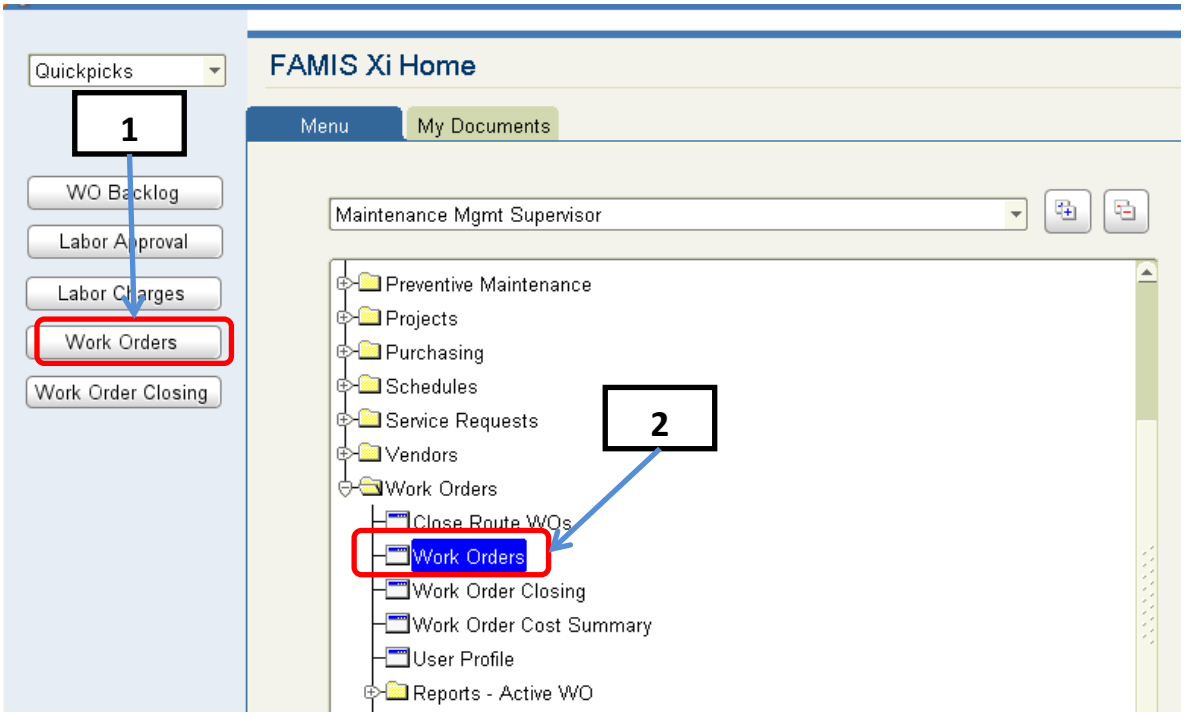


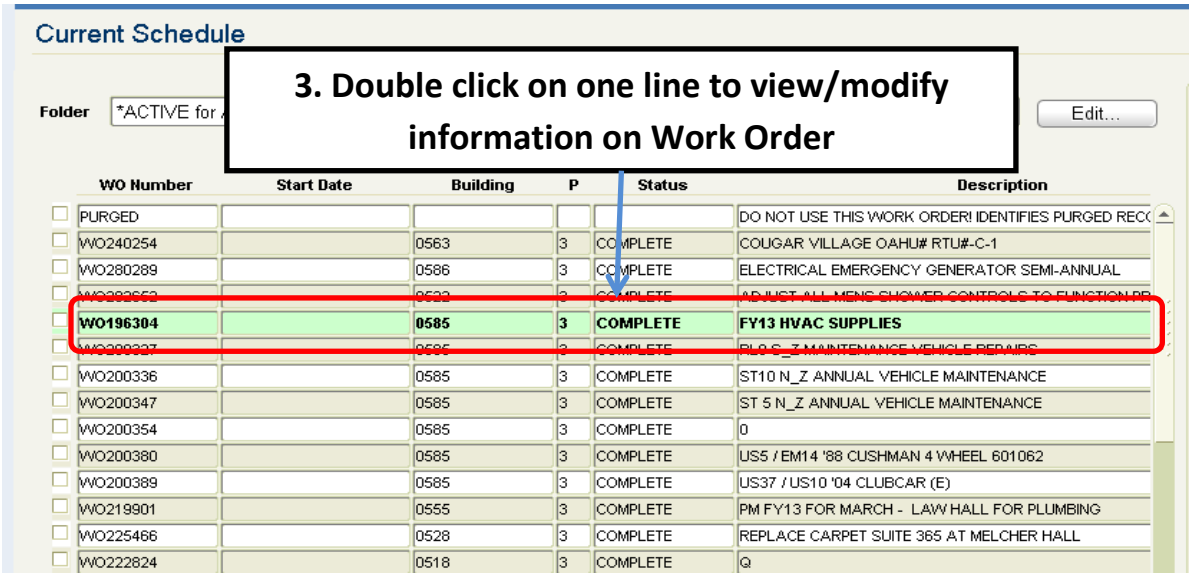
Work Order Form

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.



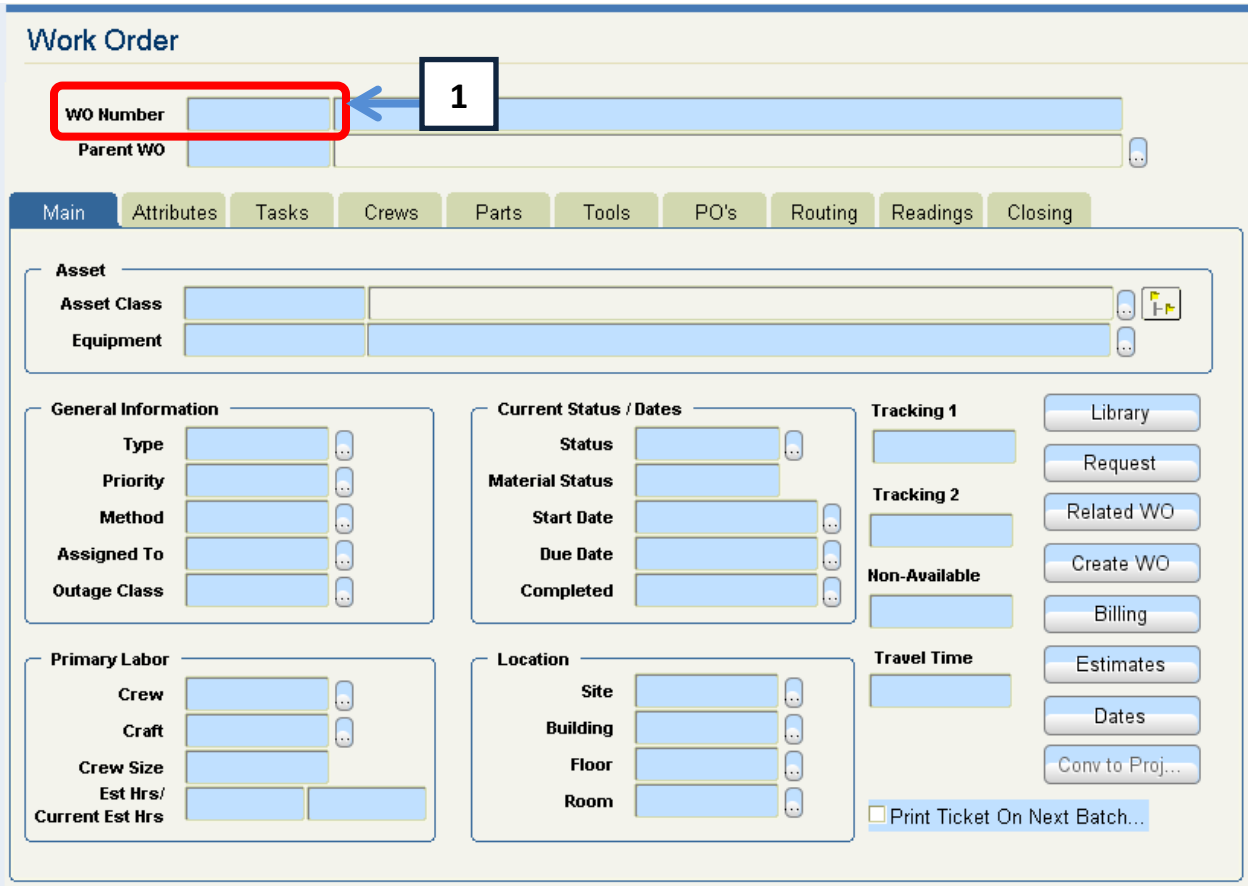


Searching for Work Orders

Four ways you can search for a specific Work Order:

Searching by entering a Work Order number

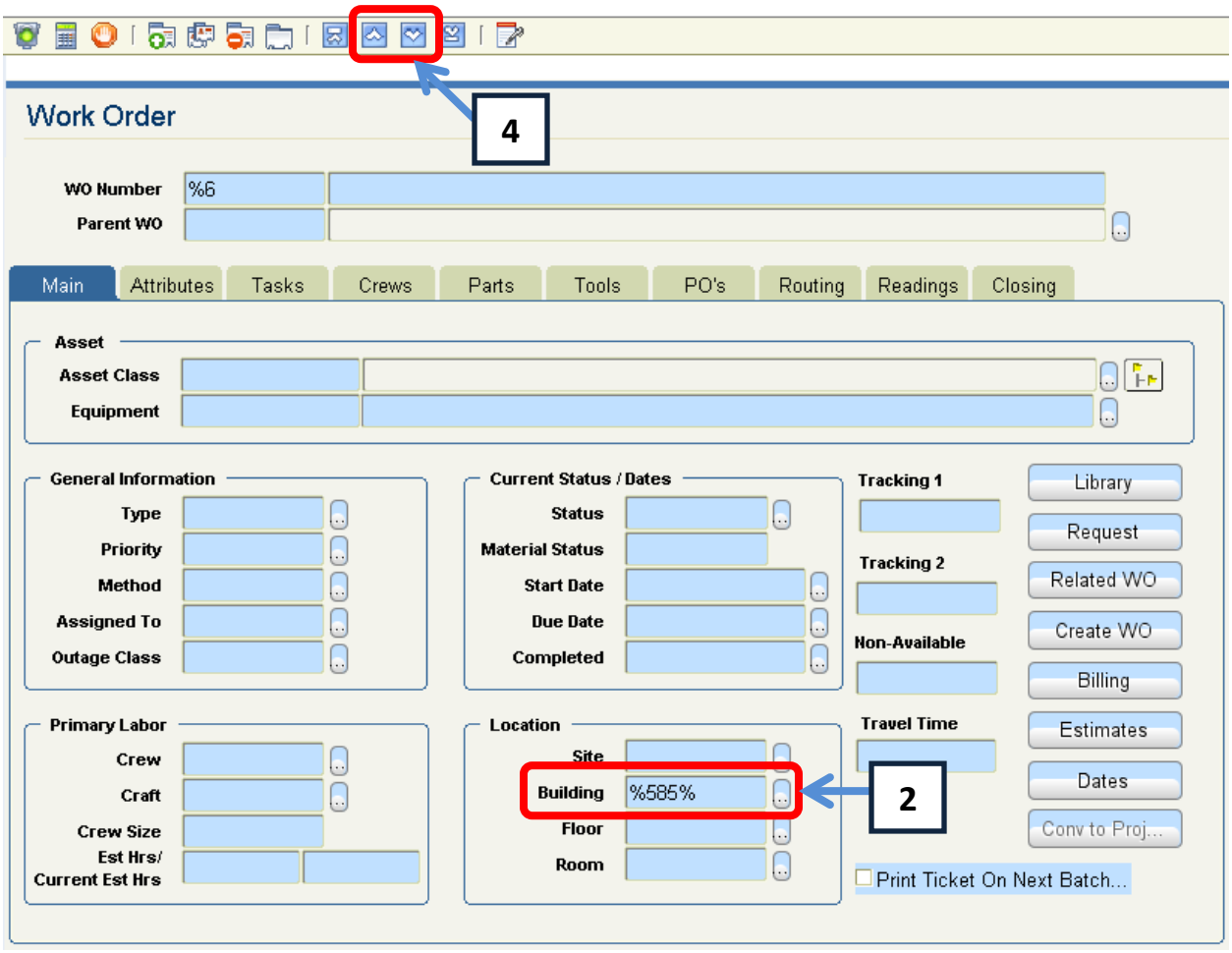
1. Press F7 to enter query in the Work Order form; all fields will turn blue
2. Enter the specific WO Number in the blue field
3. Press F8 to run query; F8 will open the specific Work Order



"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

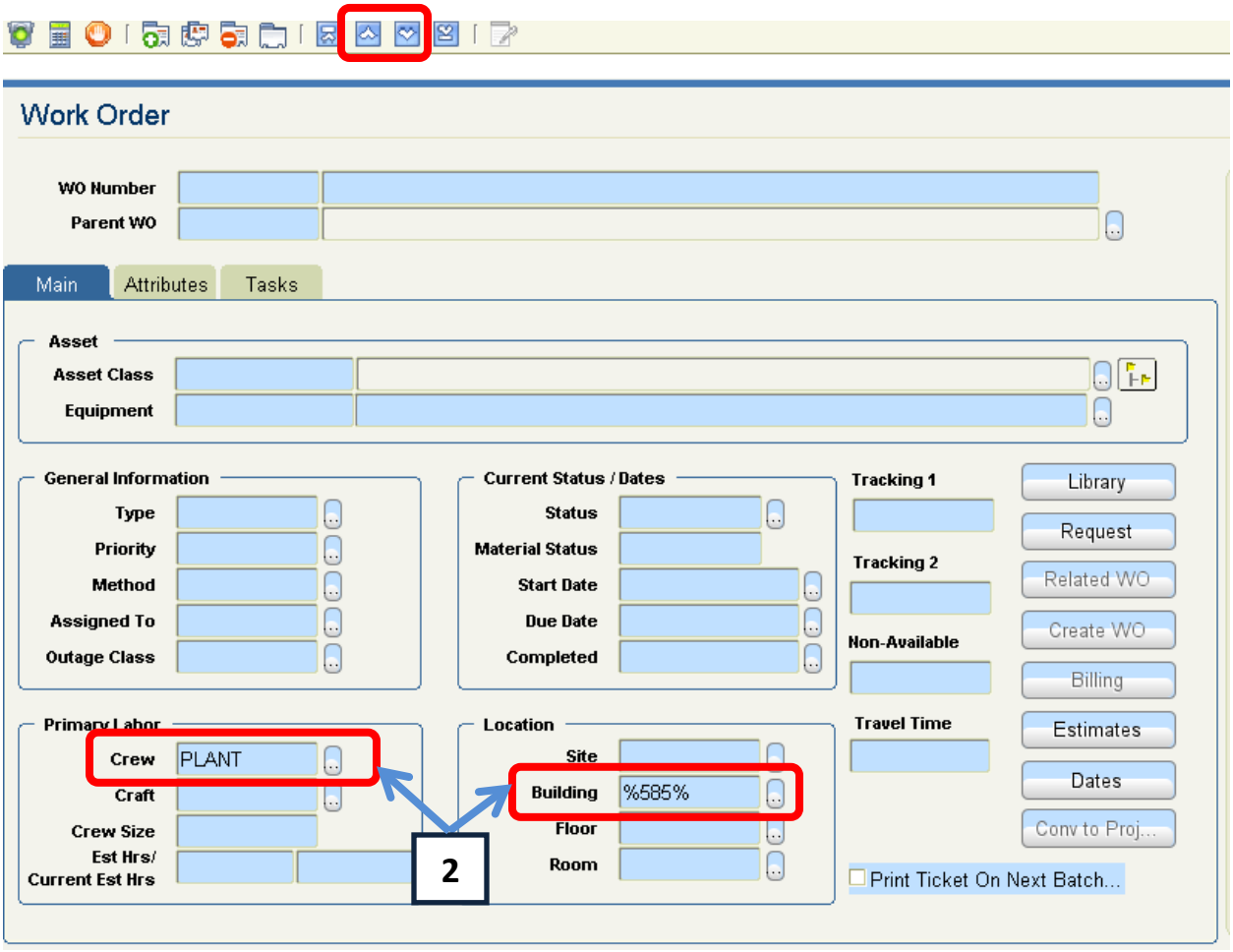
1. In the Work Order form, press F7 to enter query
2. Once all fields turn blue, enter the specific criteria between 2 percent signs; in this case we will enter %585% to view all work orders in building 585
3. Press F8 to run query; F8 will open the first Work Order
4. Use the arrow keys to navigate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



Multiple Field Search

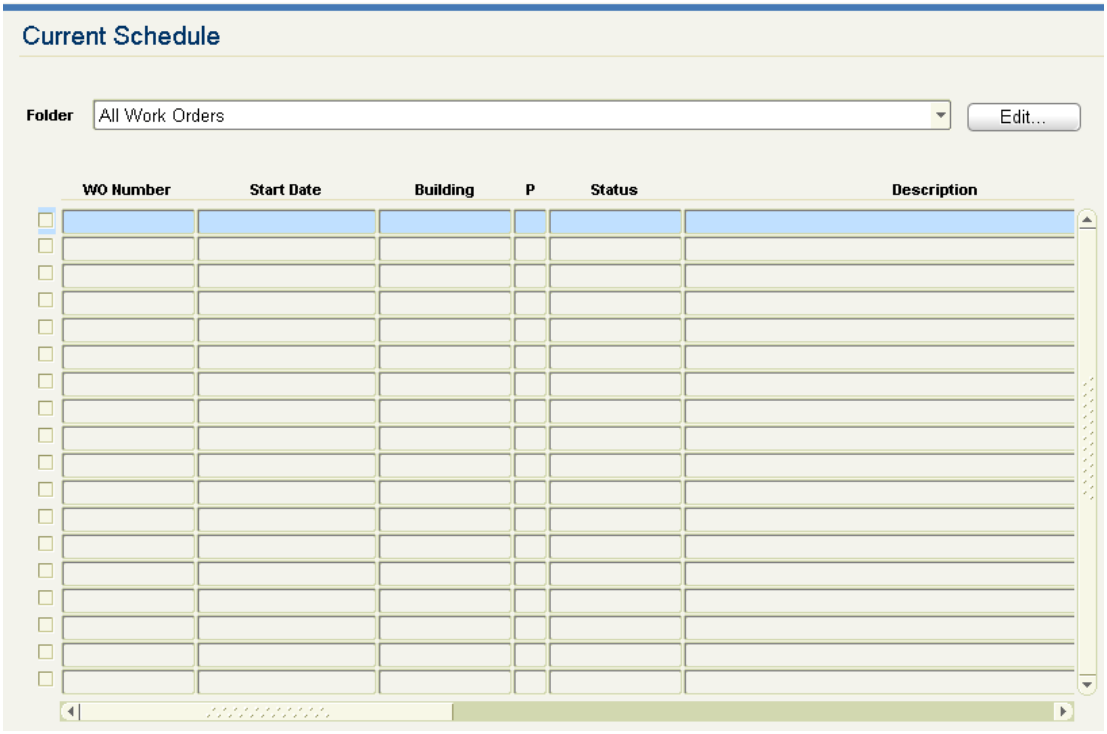
This feature allows you to view **all** Work Orders that meet more than one specific criterion. For example, let's view all Work Orders in Building 585 and assigned to the PLANT crew

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

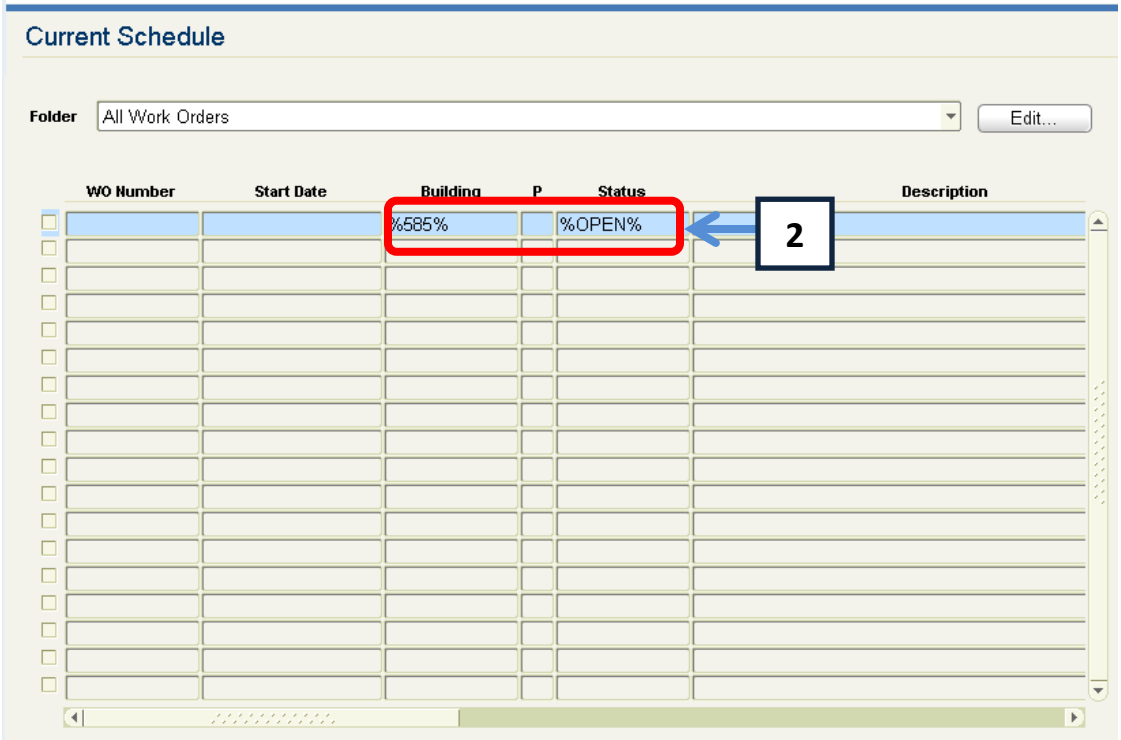


Workbench Search

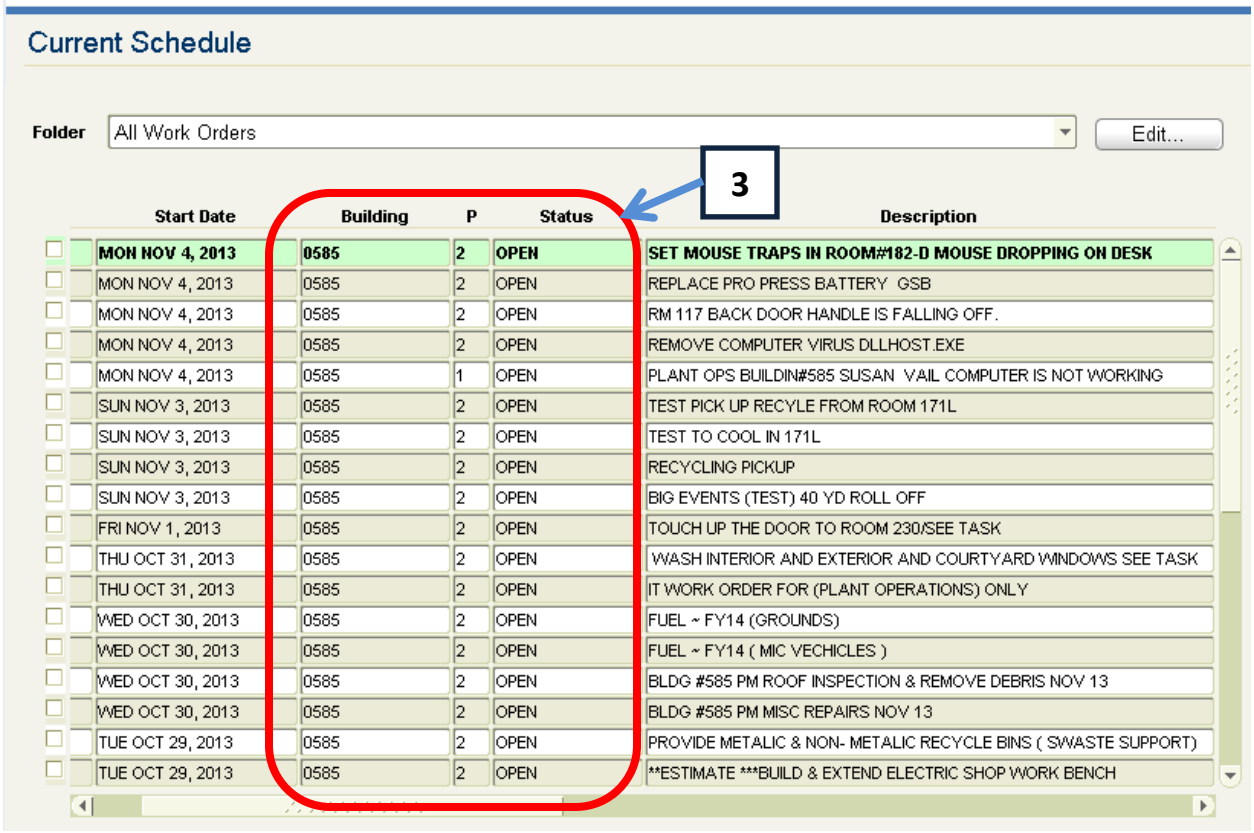
1. To search for a specific Work Order in the work order workbench, press F7 in the workbench; screen below will be displayed



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

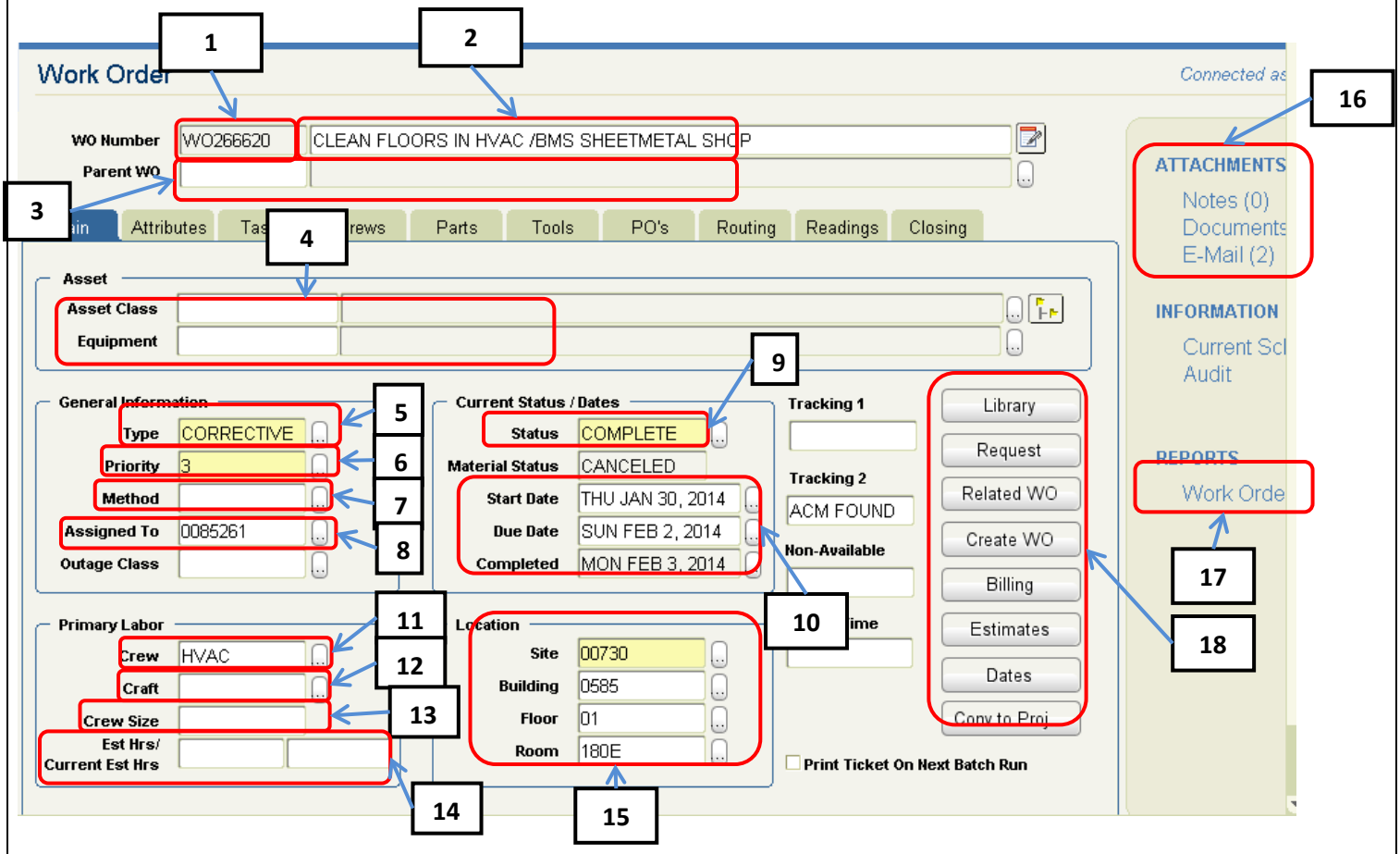


3. Press F8 to run query and view all Work Orders in the work bench that are OPEN and in building 585
4. Double click on the specific work order to view Work Order details



Work Order Form Overview

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



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

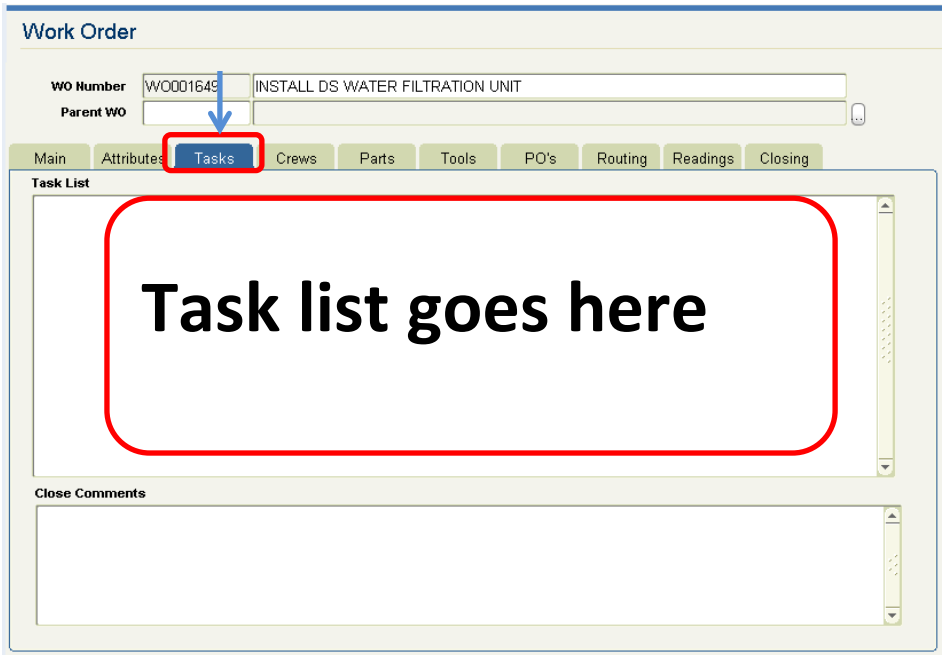
Estimates – allows you to view/enter and calculate work order estimates

Dates – date work order was scheduled

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

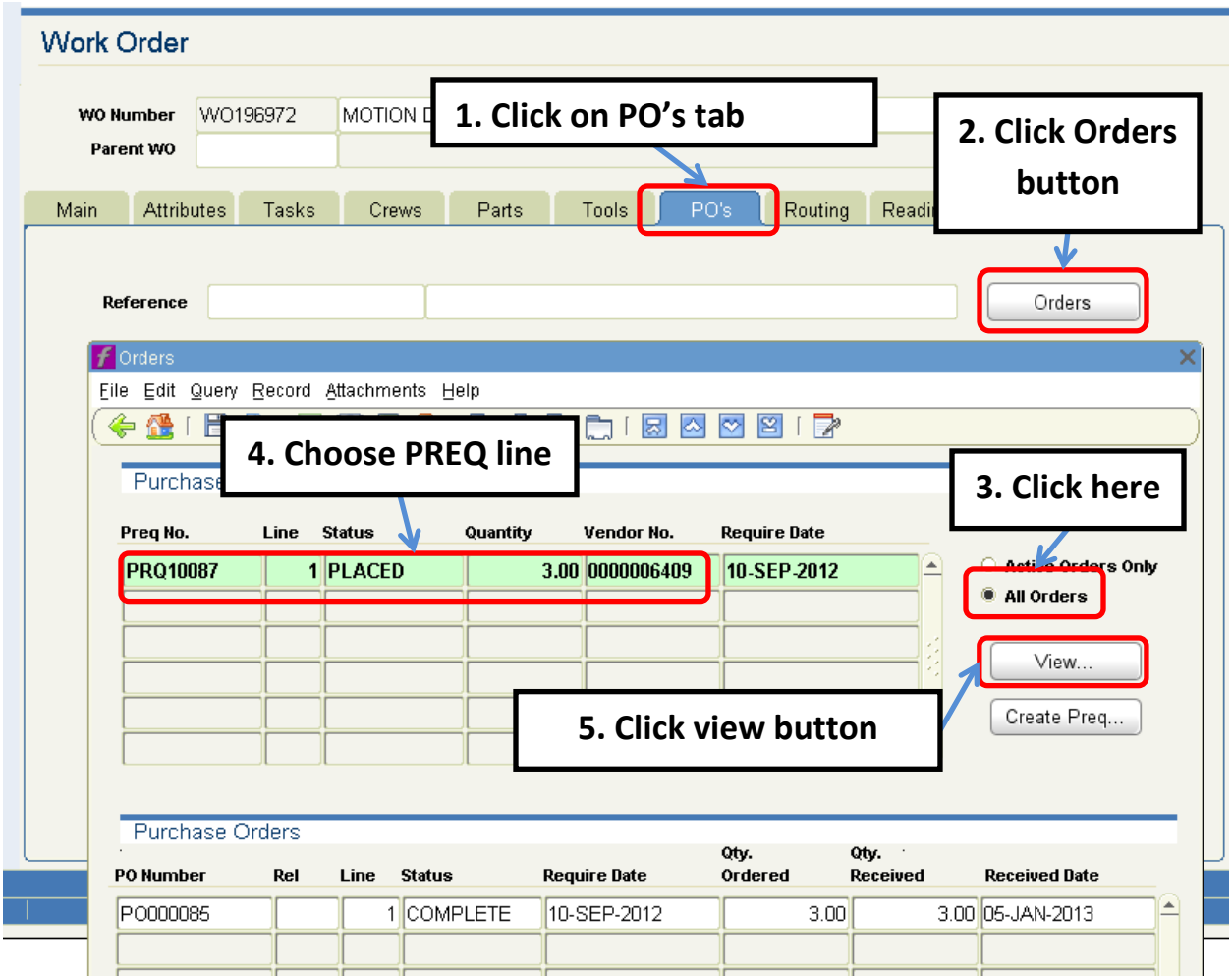
19. Task List of a Work Order

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

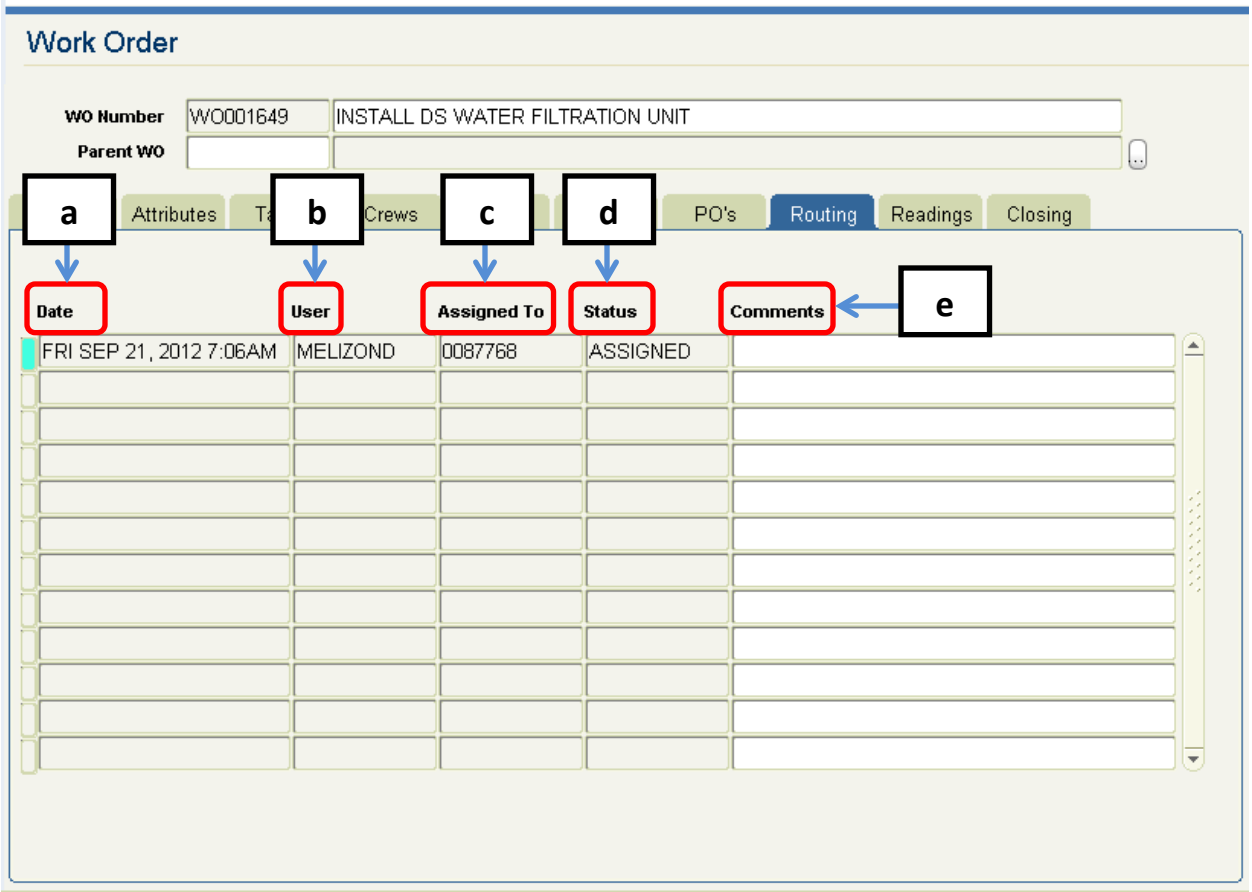


20. PO's tab

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



Routing tab displays the routing history of the work order; a record is automatically added to the routing history whenever the status of a work order is changed or the person assigned to the work order



The routing tab displays:

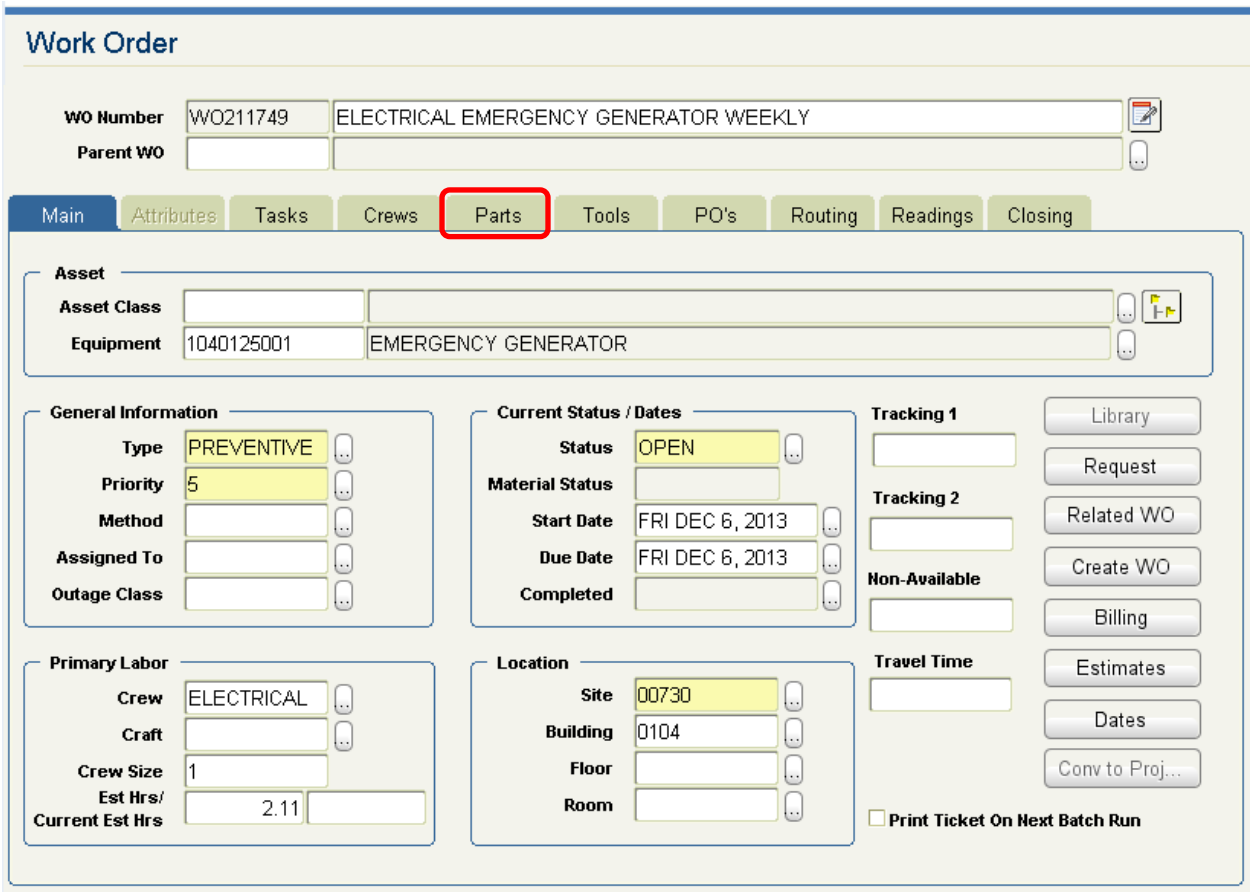
a. **Date –** displays data and time of routing change
b. **User –** displays the User ID of the person who made the change
c. **Assigned To –** displays the Employee ID of the person now assigned to the work order
d. **Status –** displays status of work order at specified date
e. **Comments –** enables you to type comments about routing change

Materials

Planning Material for a Work Order

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

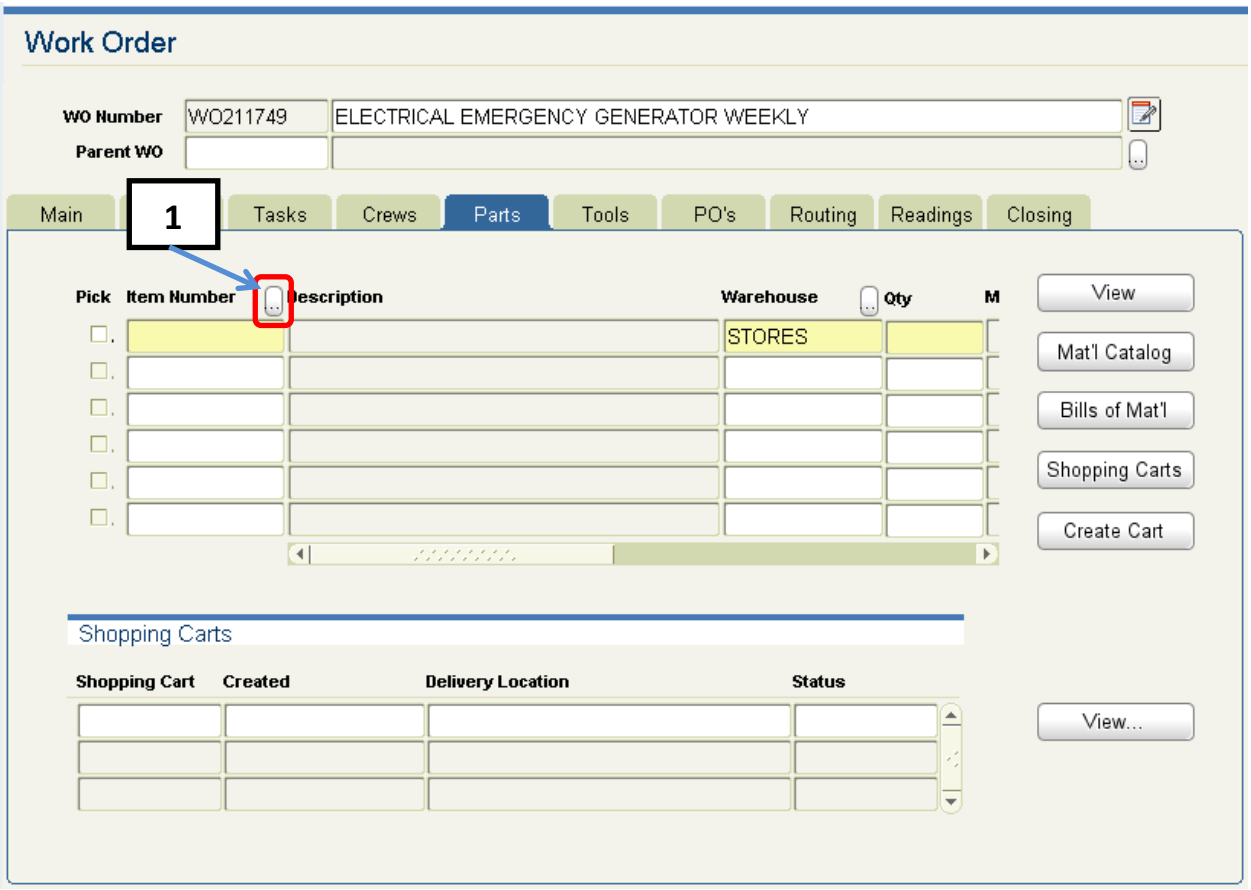
Open specific Work Order form and navigate to the **Parts tab**



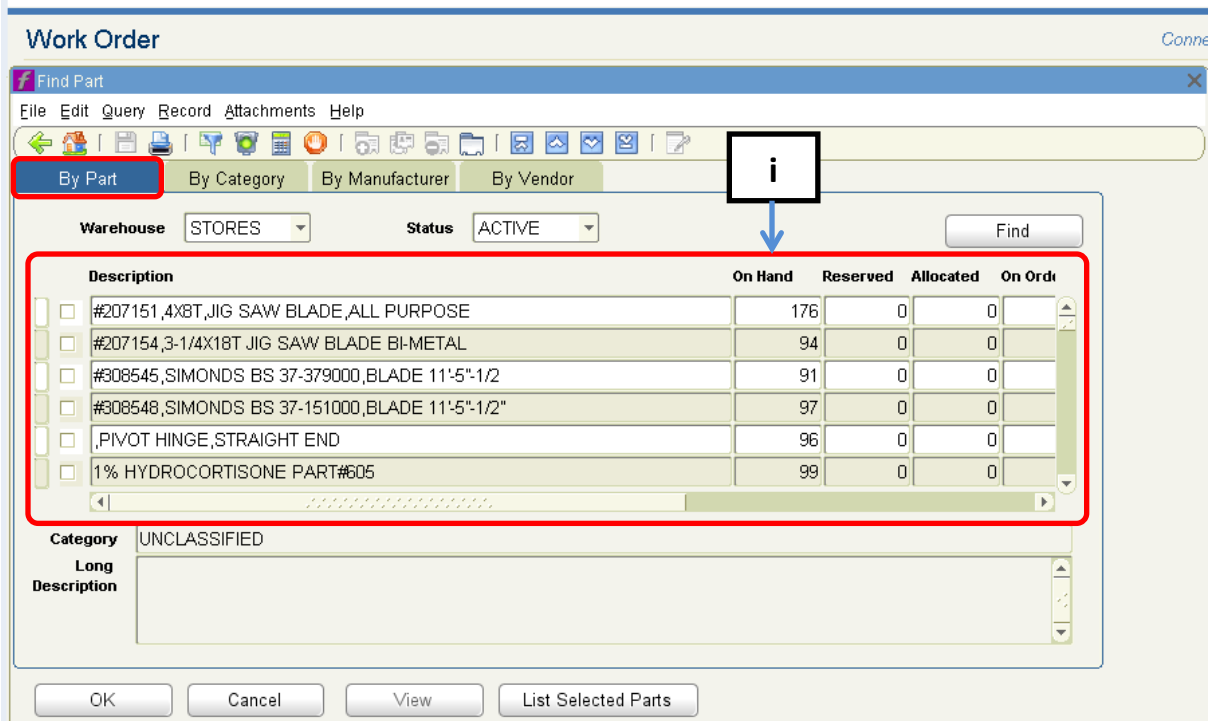
Parts Tab allows you to enter list of parts and material required to perform Work Order **for planning purposes**

> ***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



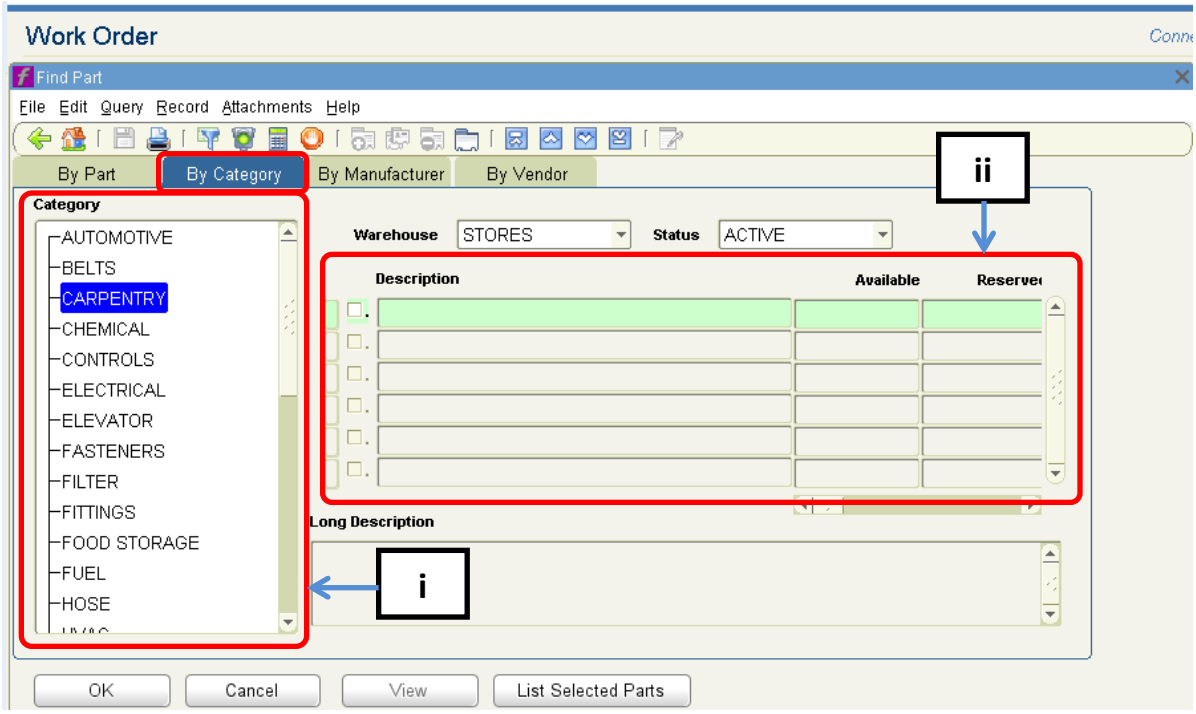
2. The **Item Number '...'** invokes the window below, allowing you to search, view and select parts in four different ways:
   i. **By Part** – this tab displays all parts; query to search for specific part
      a. All parts displayed here



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

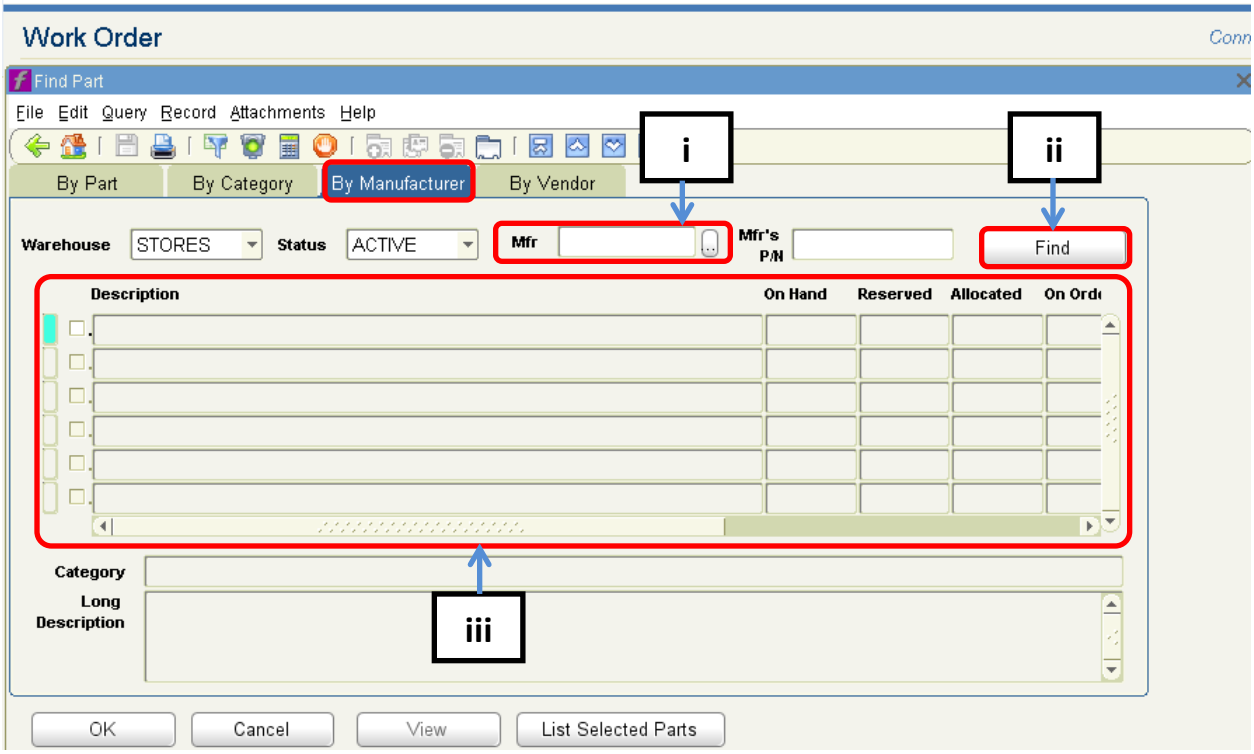


iii. **By Manufacturer** – this tab lets you search for a part by its manufacturer

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

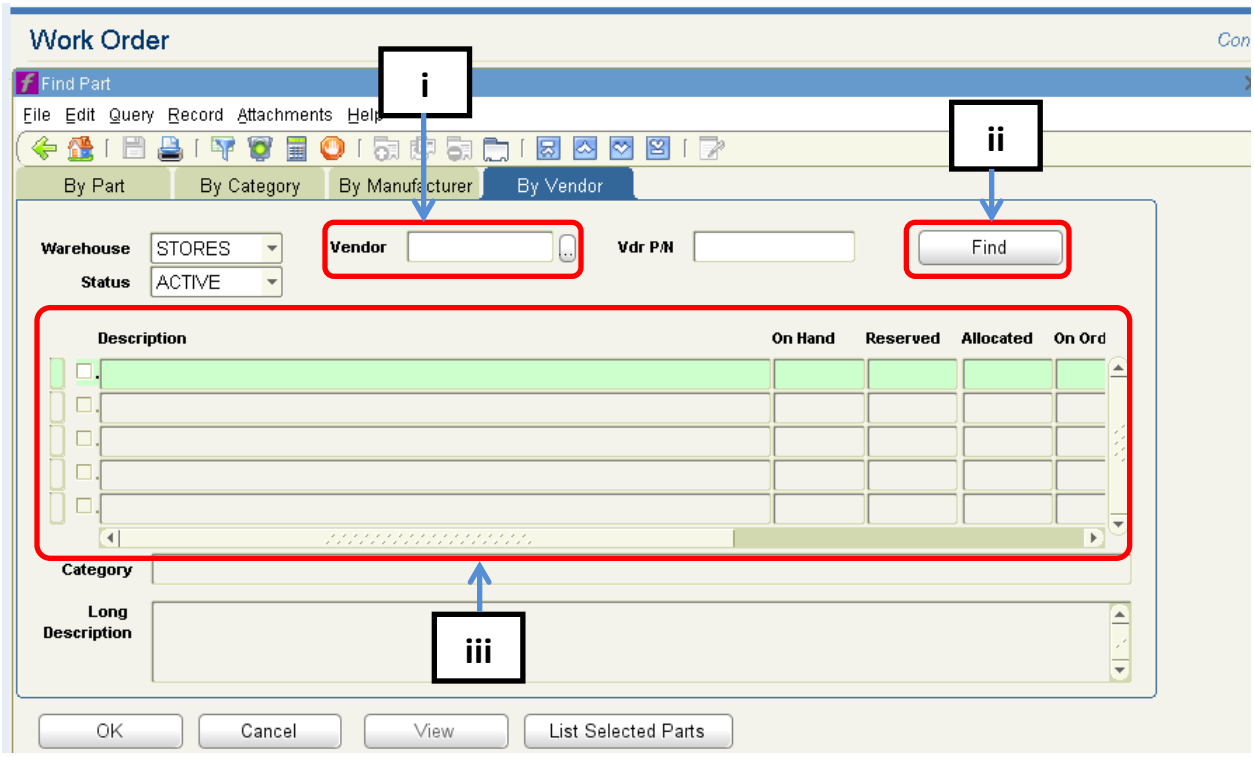


iv. **By Vendor** – this tab allows you to search for a specific part by its vendor

a. Click **'...'** to view list of vendors, click OK after selecting a vendor

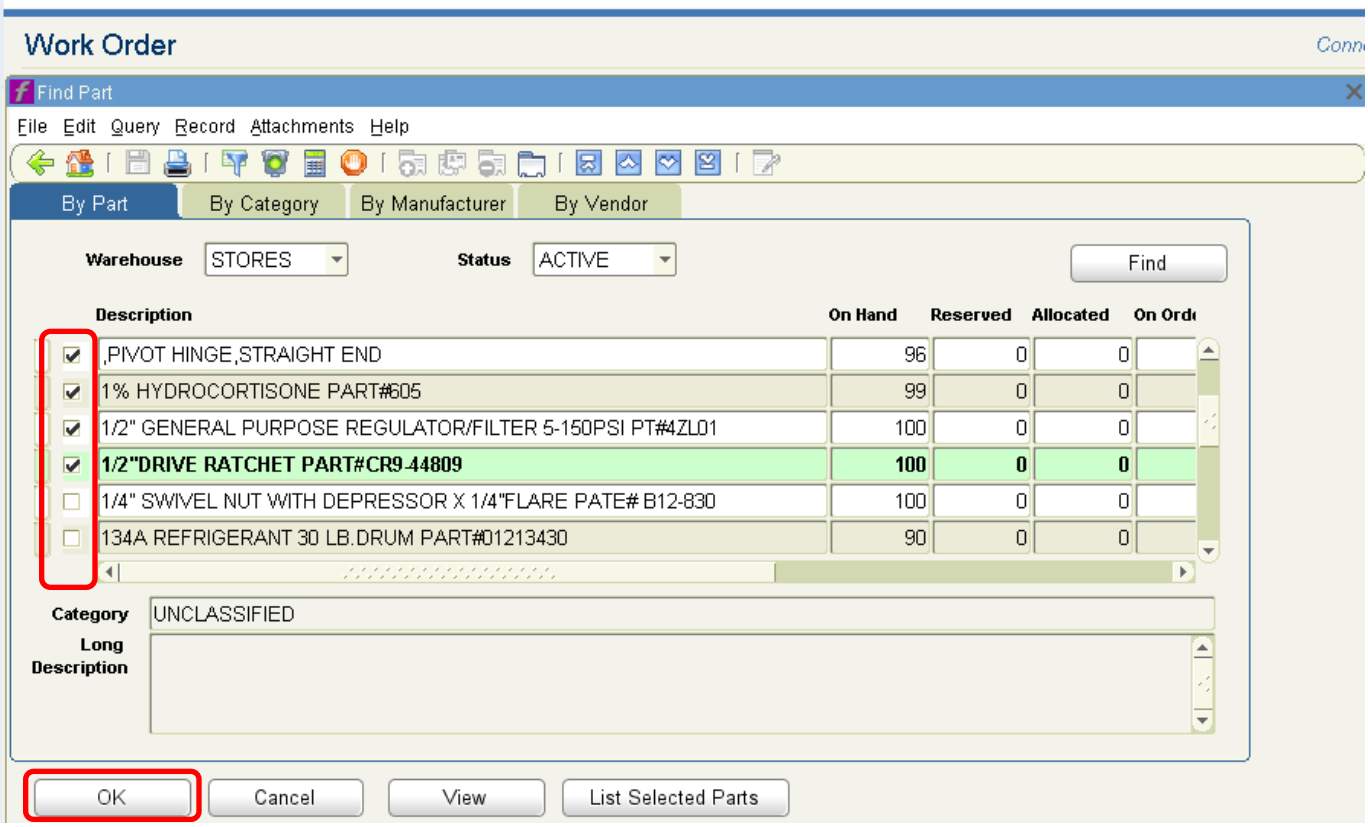
b. Press **Find** button

c. Select from newly displayed list of parts

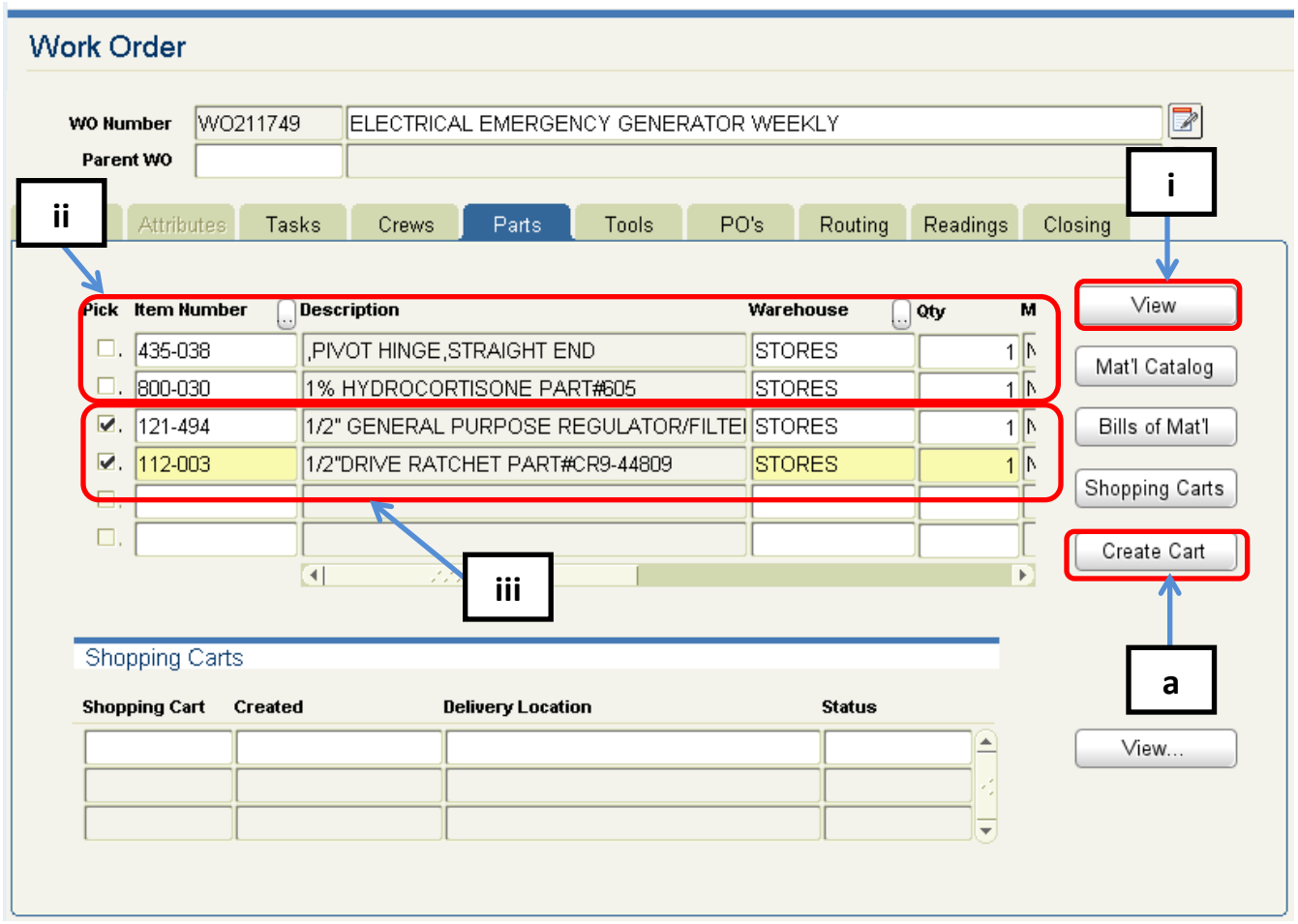


Inventory Purchase with Shopping Cart feature

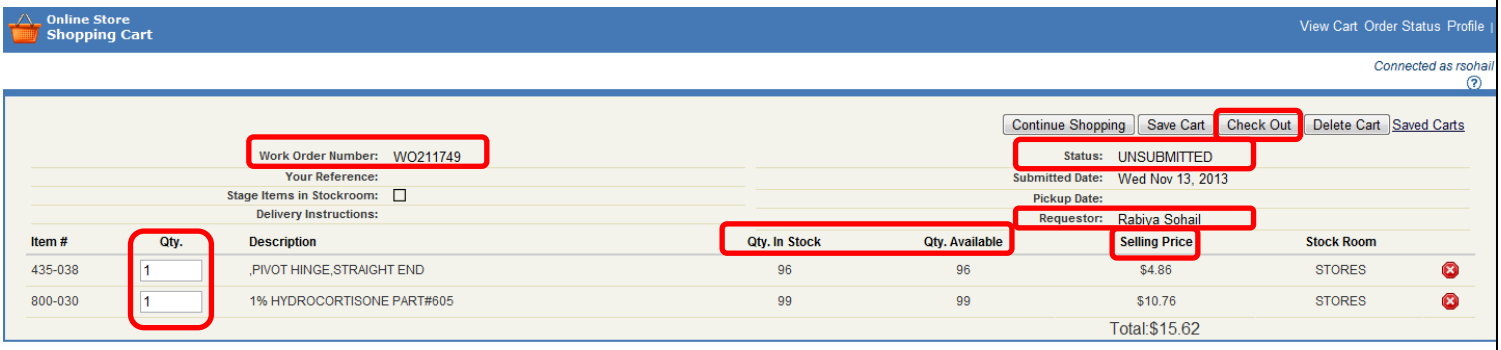
To finally purchase parts, select desired parts by checking box on the right and click OK; in this case we have 4 parts selected



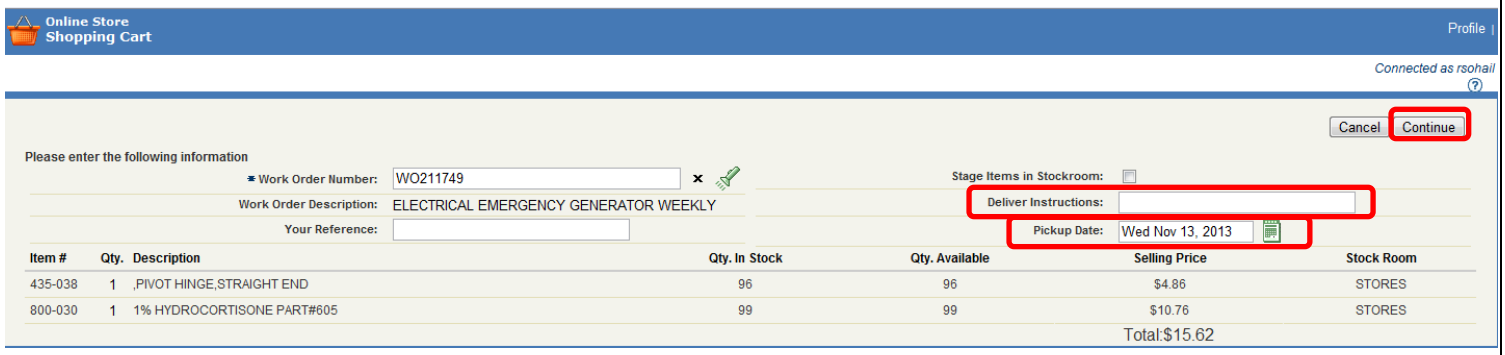
3. Clicking OK returns you back to the Parts tab in the Work Order form; you may use parts for planning purposes or purchasing.
   i. **View** button allows you to view additional information about the selected part
   ii. Parts for planning purposes
   iii. Parts to be purchased; **Pick** box checked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



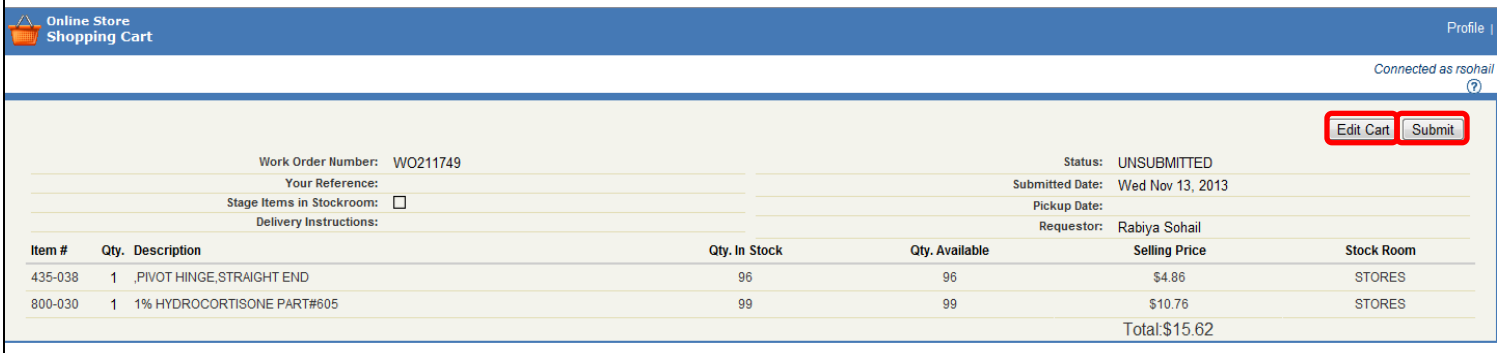
4. View details in the Shopping Car, such as the WO Number, Quantity details, Selling Price, name of Requestor, Status; when ready to proceed, press the **Check Out** button



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



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

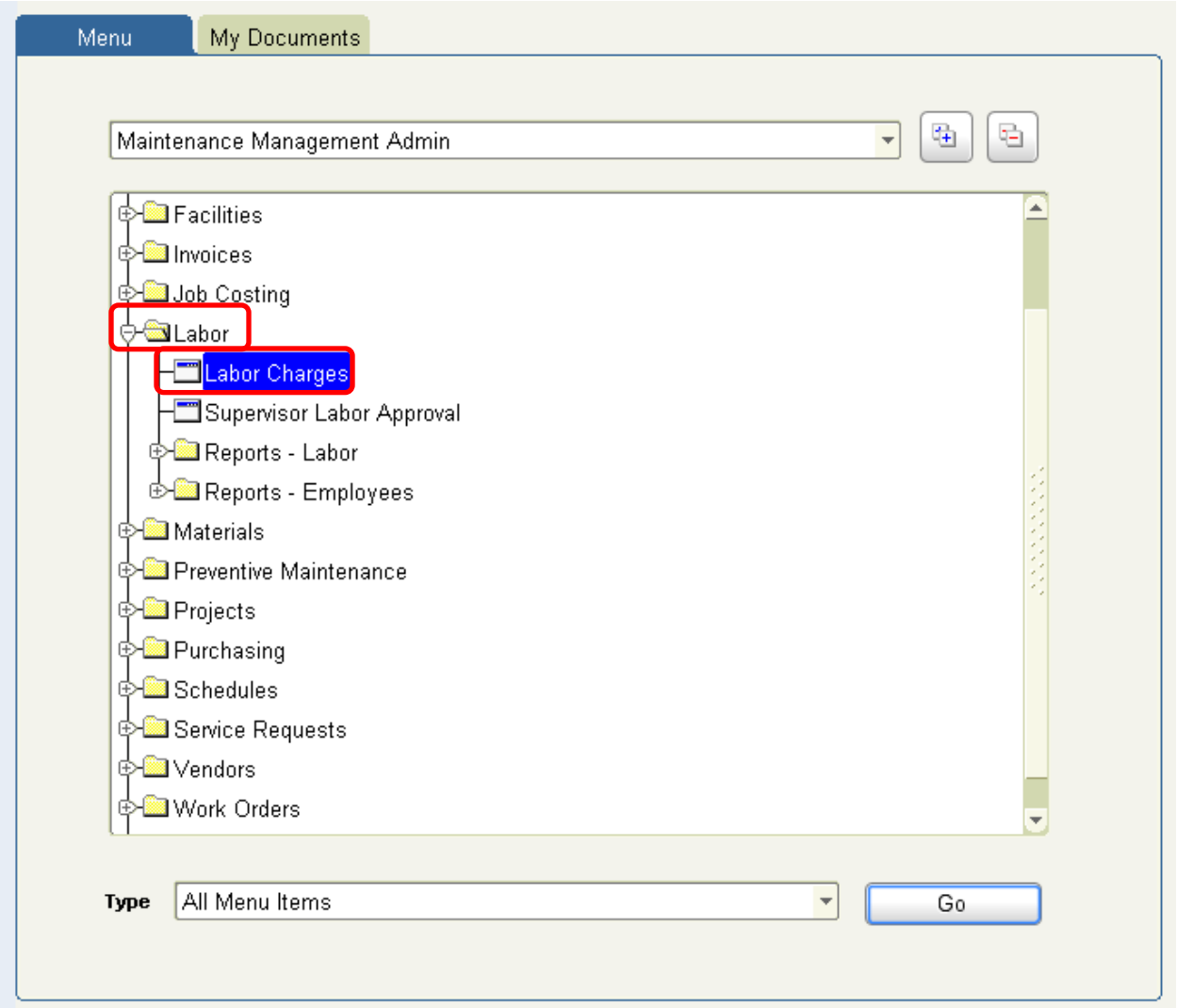


7. Submitted information will reflect in Work Order form in the Parts tab under Shopping Carts.

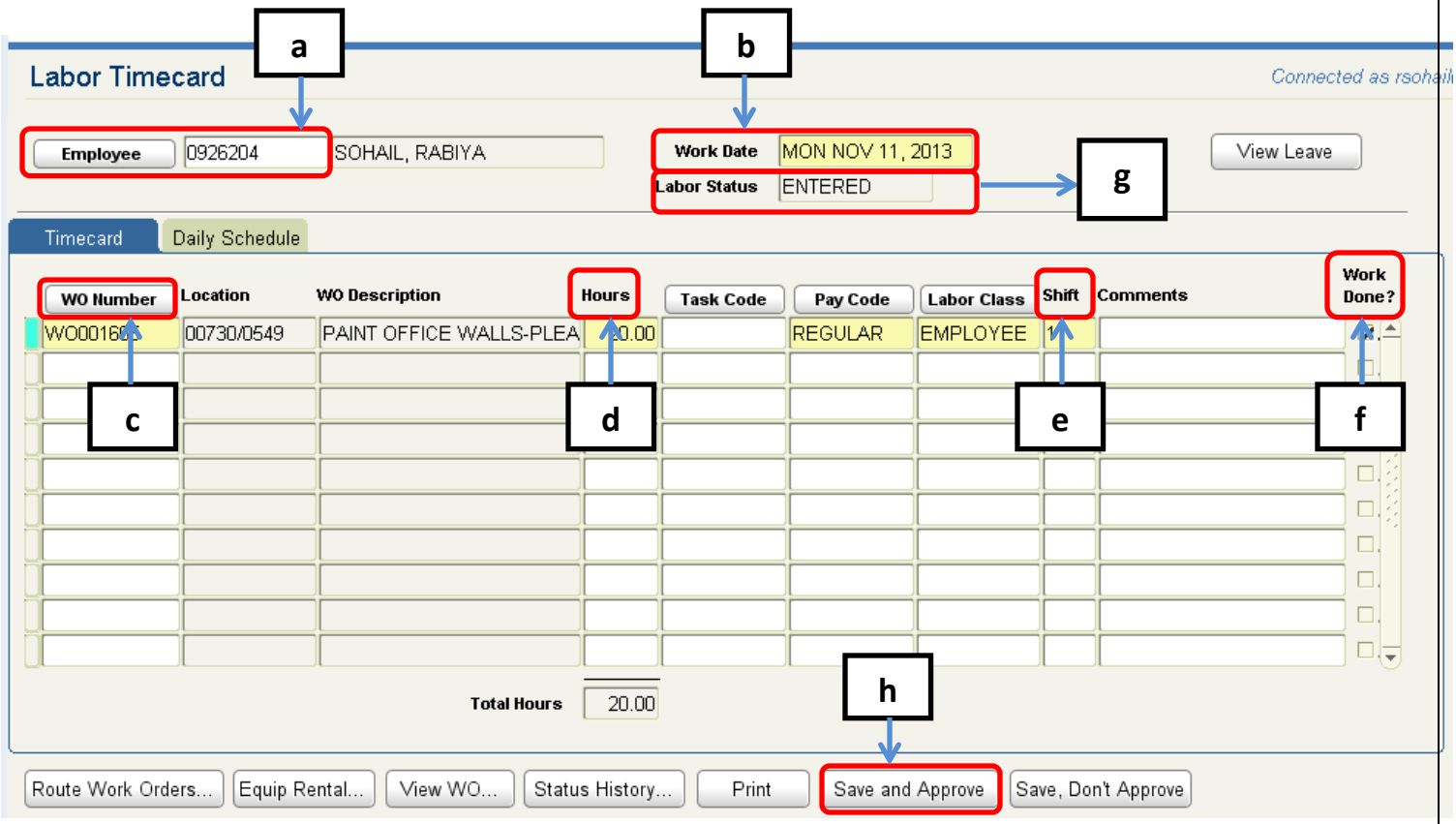
Time Card Entry

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



Labor Timecard Form details



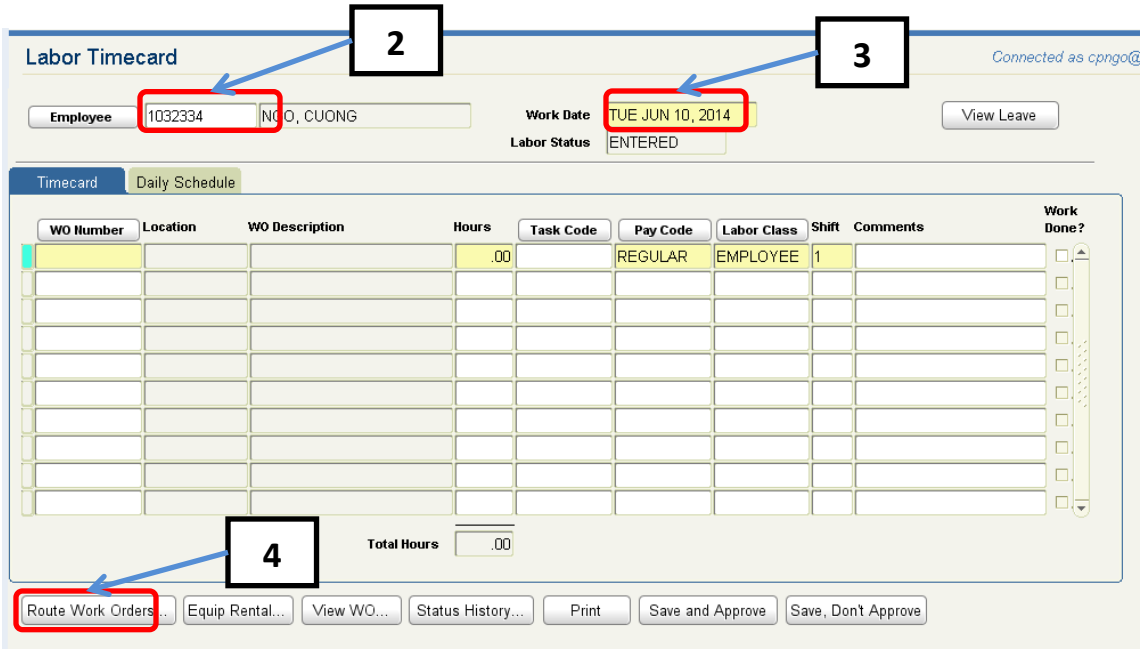
a. Enter **Employee ID**, employee name will automatically fill in
b. Enter **Work Date**
c. Enter **WO Number** of work order performed
d. Enter **Hours** worked on work order for the day
e. Enter **Shift** number
f. Check **Work Done** check box

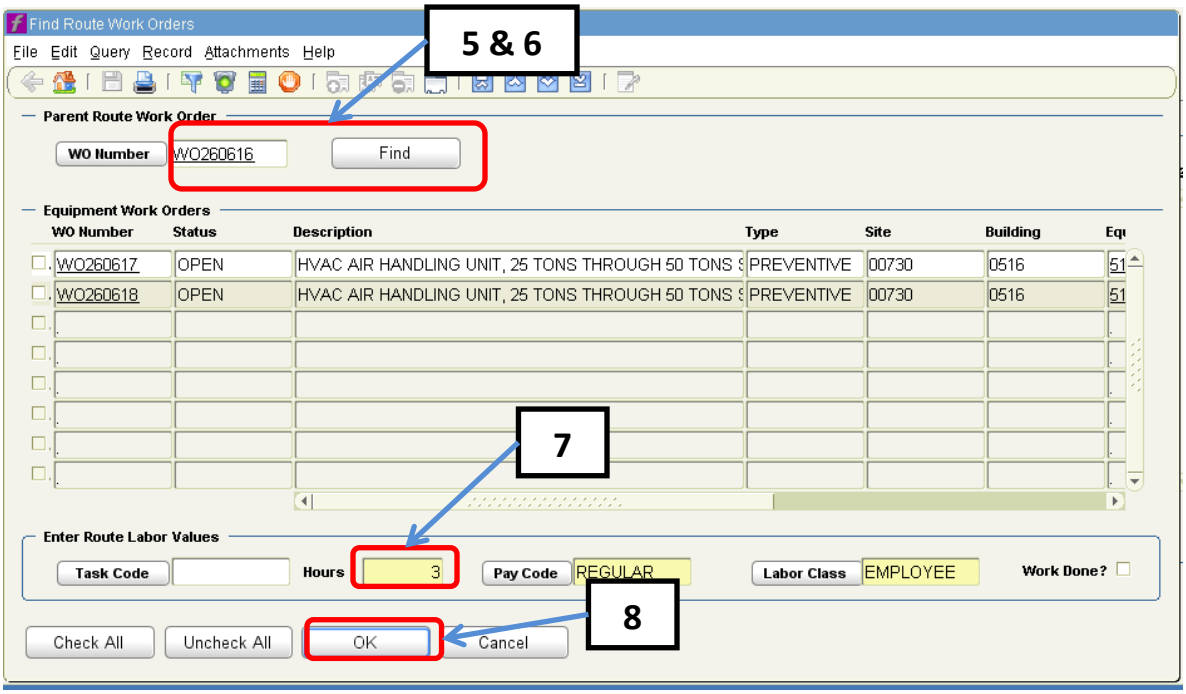
All other fields will automatically fill in.

g. **Labor status** has default value of "ENTERED" when the labor charges are initially entered. When you Save and Approve, the status will change to "E APPROVE". When the Supervisor approves, the status will change to APPROVE. If supervisor rejects timecard, the reason for rejection will be displayed under Labor Status.
h. Press **Save and Approve** button when done, this sends timecard information to supervisor for approval

Adding Time for Route Work Orders

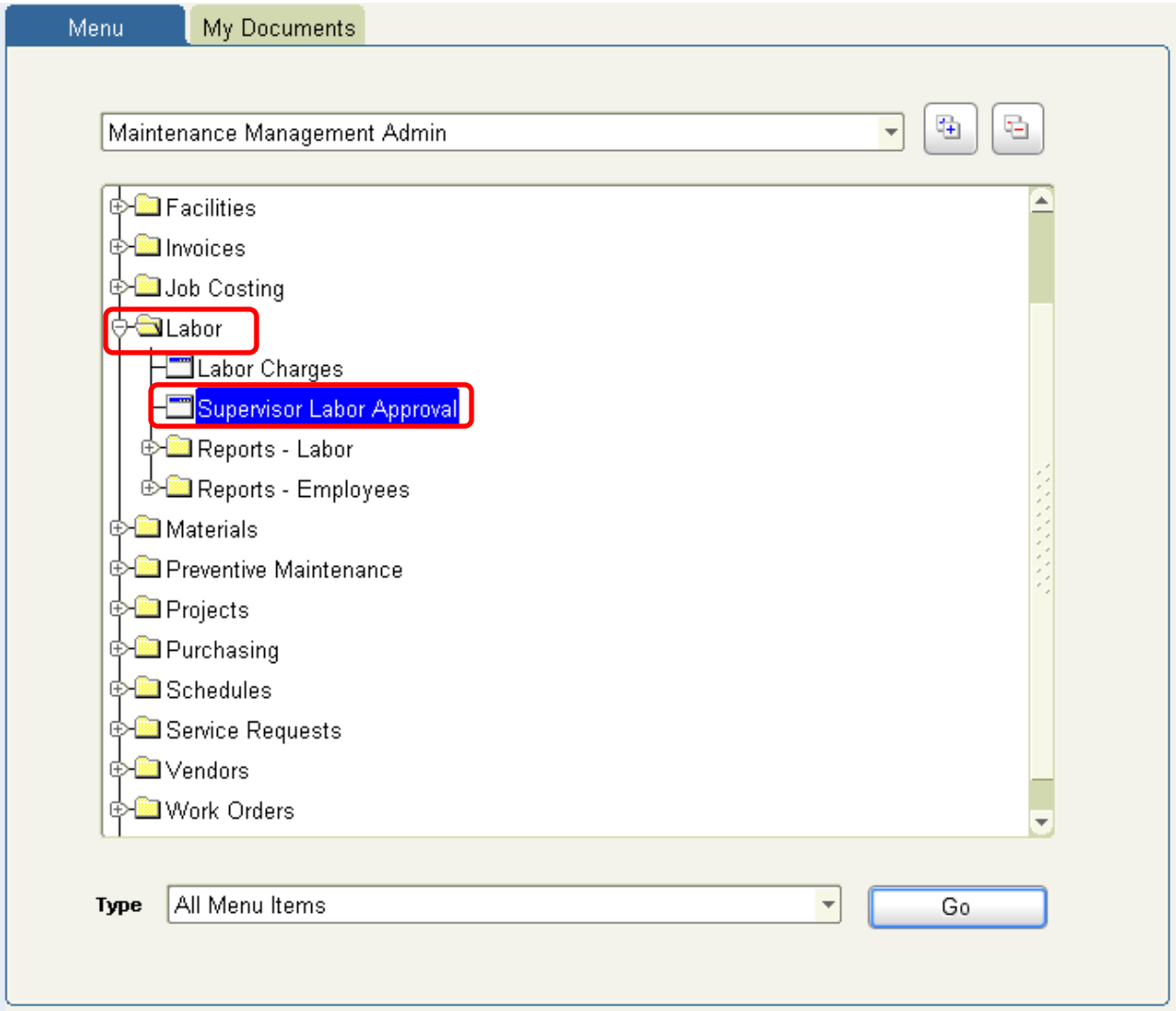
1. Go to the **Labor Timecard form**
2. Enter **Employee number**
3. Enter **Work date**
4. Click on **Route Work Order button**
5. Enter the **parent WO number** of the Route
6. Click **Find button**
7. Enter **total number of hours** the employee worked on the route
8. Click **OK button**

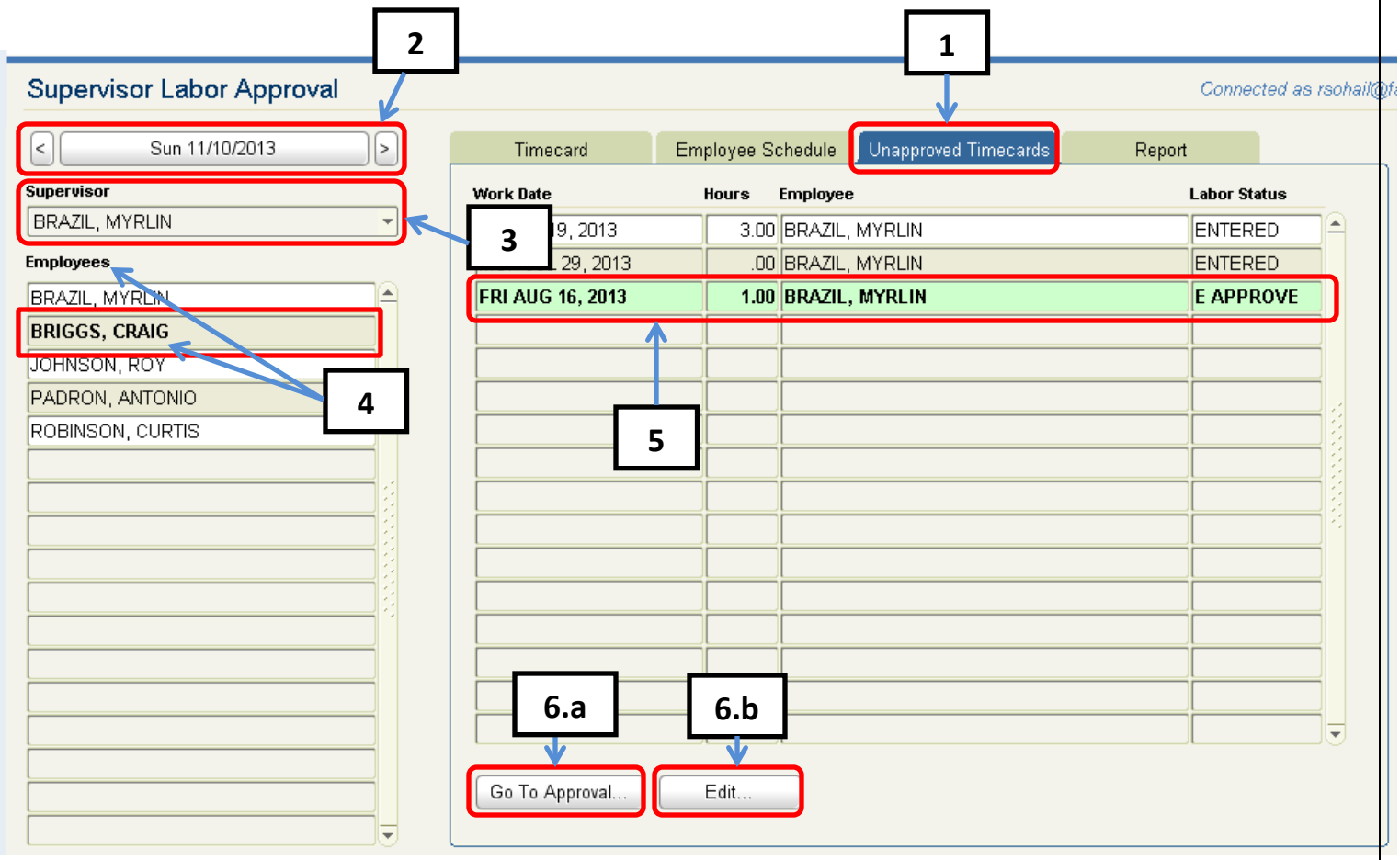




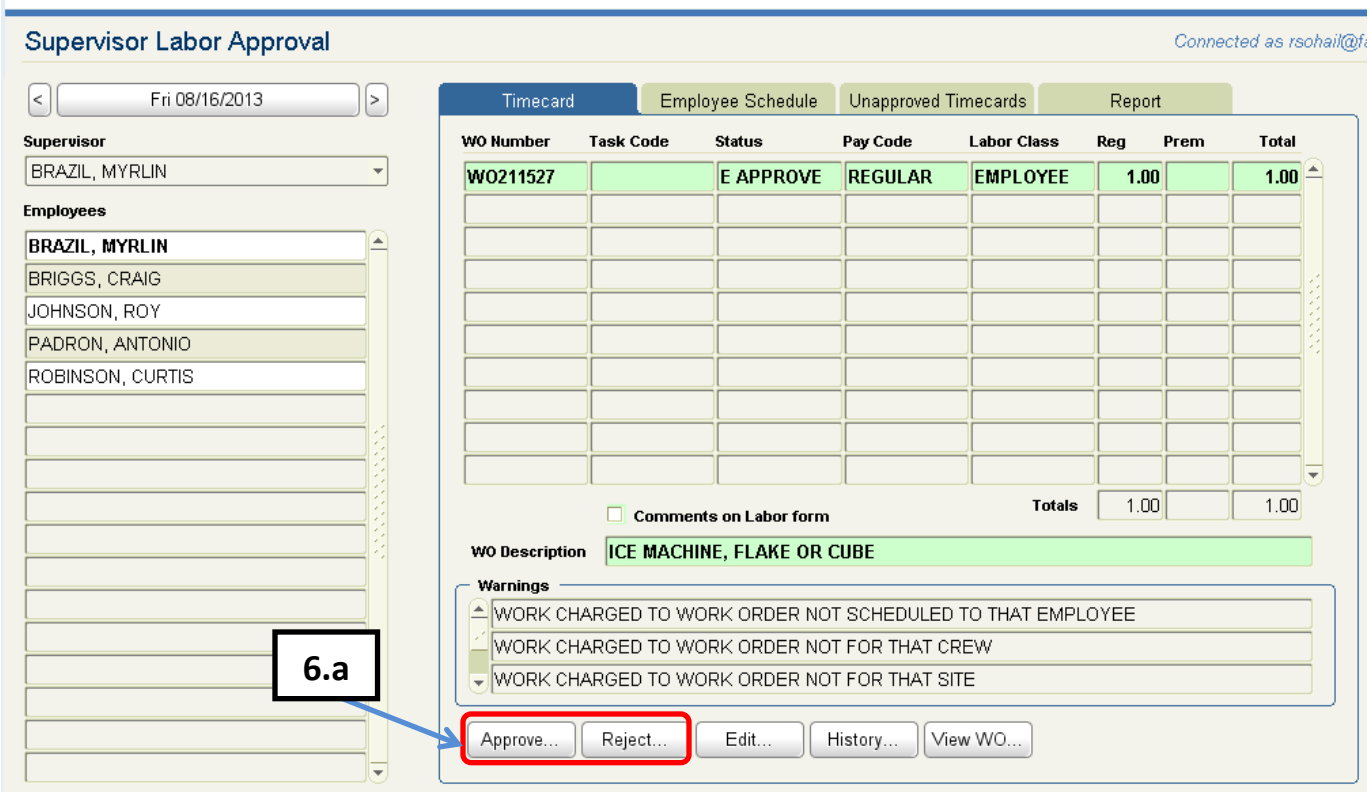
Supervisor Labor Approval

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



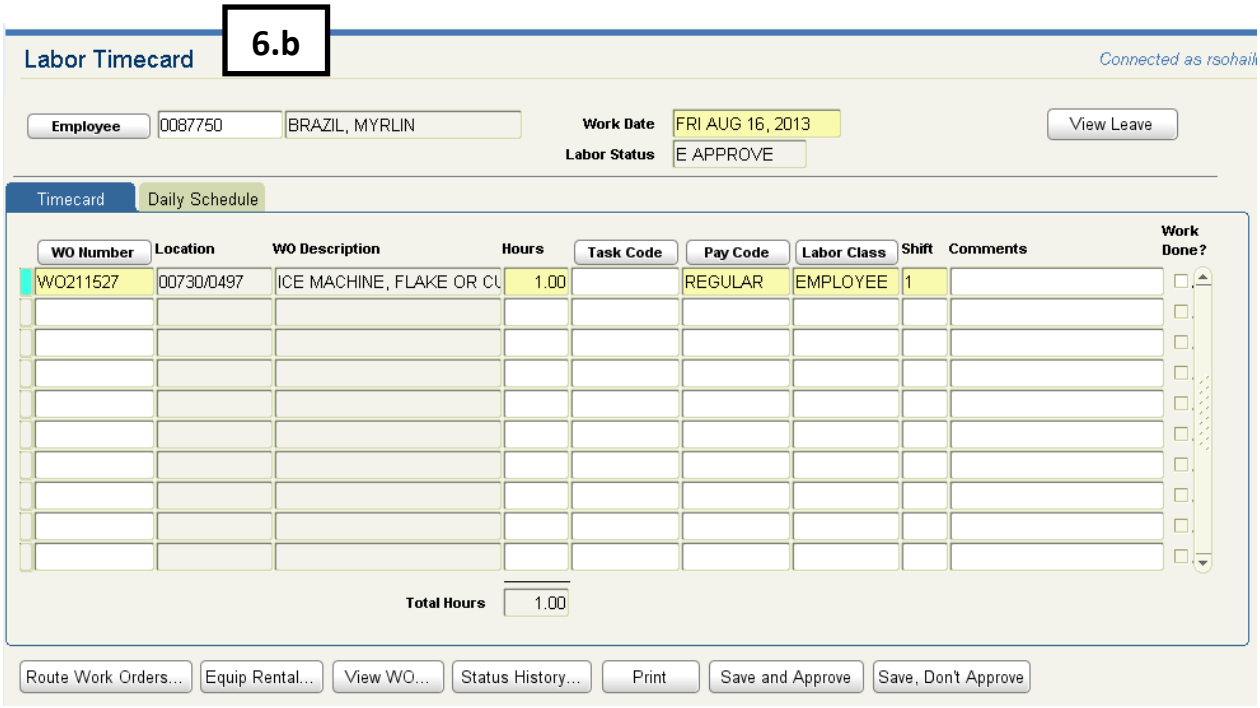


1. To approve Employee labor, select **Unapproved Timecards**
2. Select the date labor was performed
3. Select **Supervisor**(your) name
4. Click on desired employee from the **Employees** list
5. Select the employee approved labor; labor status will be **E APPROVE**
6. Click **Go To Approval** if information is correct or click **Edit** to edit employee labor timecard (both buttons will invoke new windows, displayed below):



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.

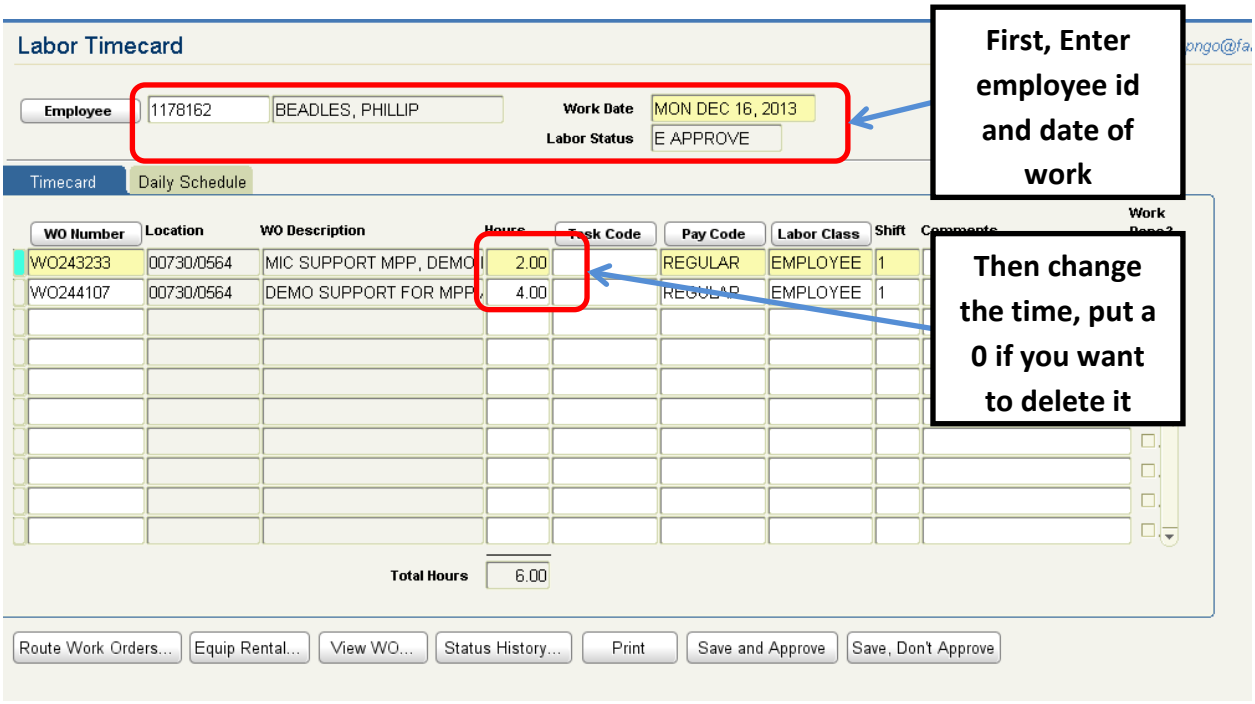
6.b) **Edit** button invokes the window below. This takes the supervisor to the employee labor timecard and allows to edit it.



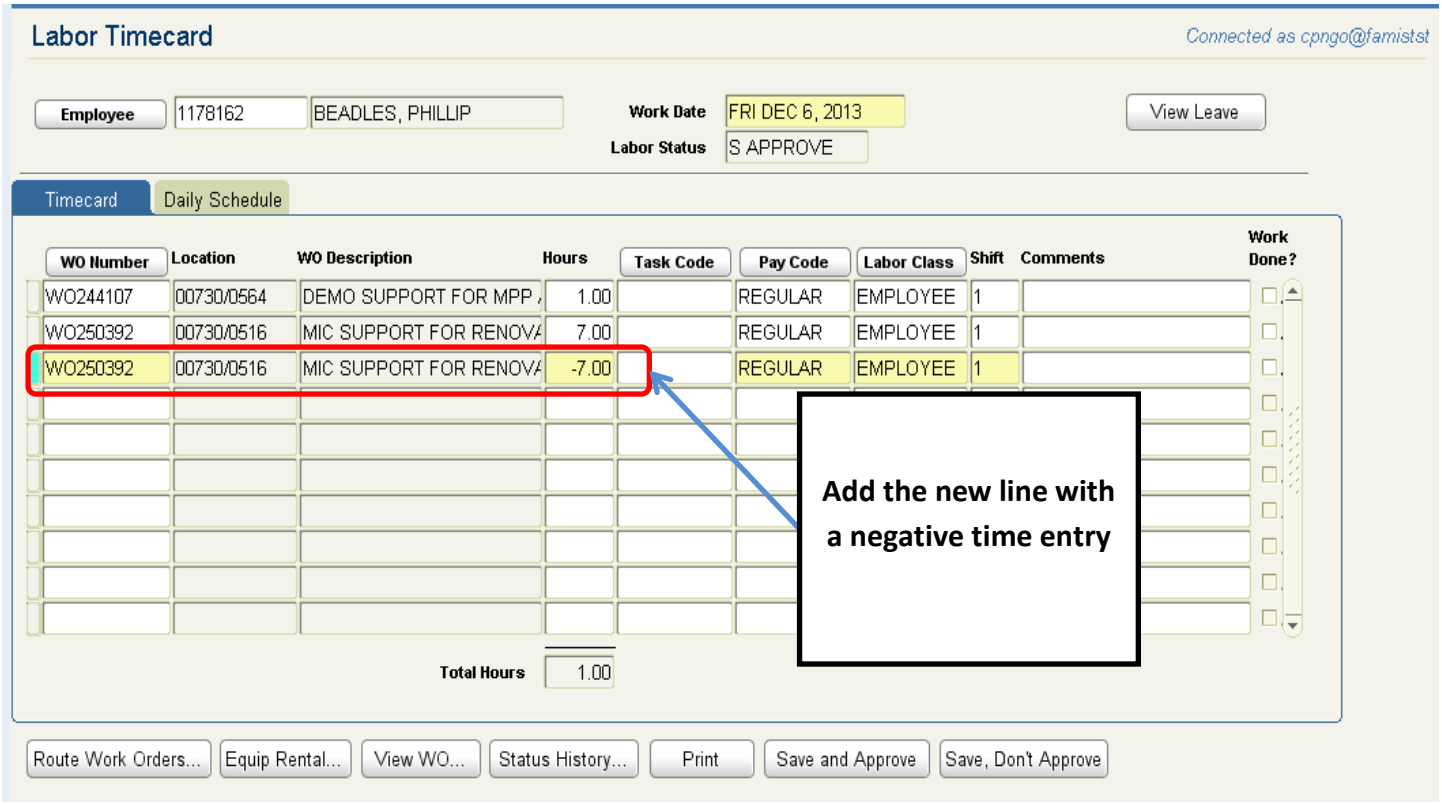
Correct Time Card Entry

Each labor time entry has a status, either **E Approve (Employee Approve)** or **S Approve (Supervisor Approve)**

If your time entry is in **E Approve Status**, you can modify it:



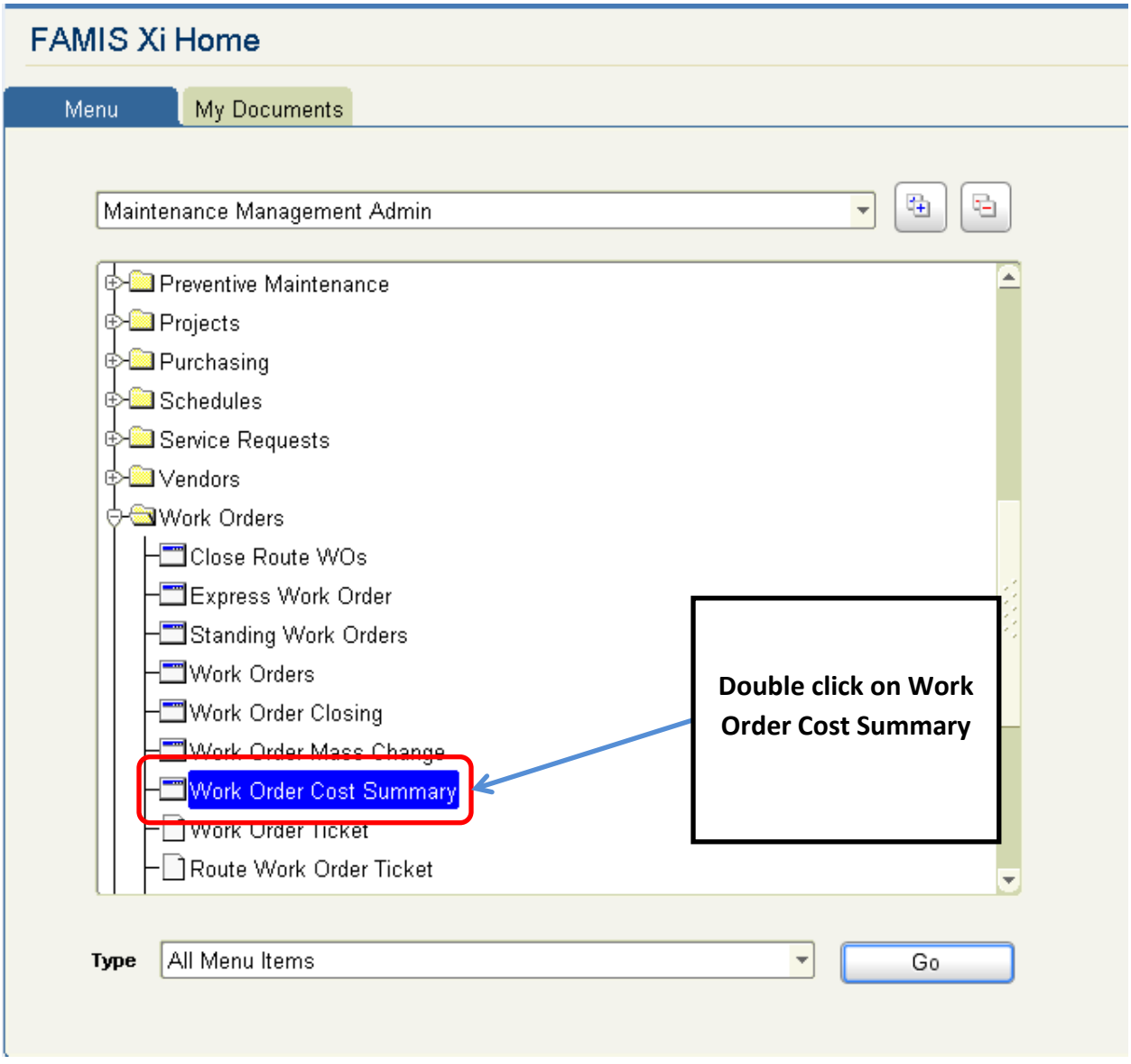
If your time entry is in **S Approve Status**, you need to add another time entry with a negative value:

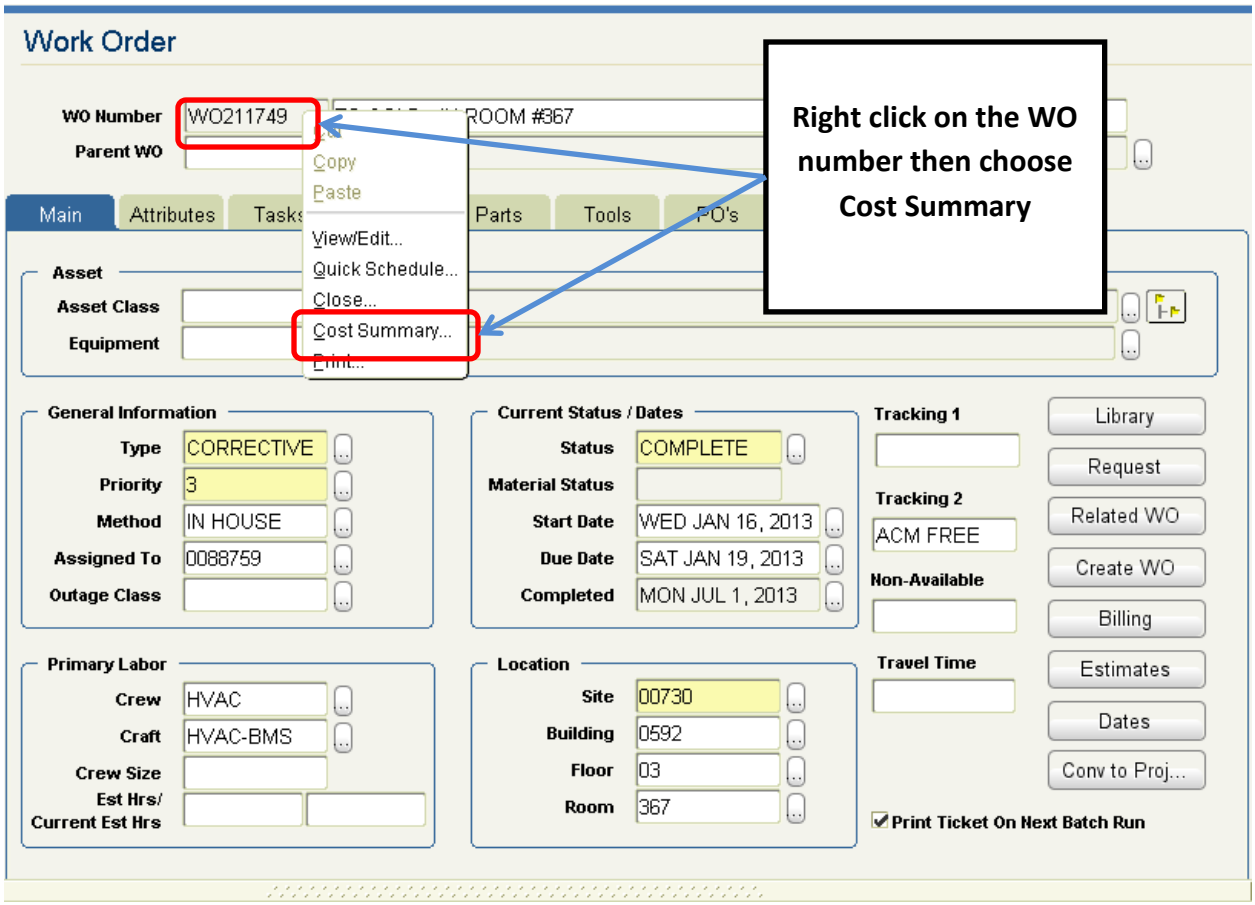


Work Order Cost

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
Parent WO
ROOM #367
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
Tracking 1
Tracking 2
ACM FREE
Non-Available
Travel Time
Library
Request
Related WO
Create WO
Billing
Estimates
Dates
Conv to Proj...
Primary Labor
Crew
HVAC
Craft
HVAC-BMS
Crew Size
Est Hrs/
Current Est Hrs
Location
Site
00730
Building
0592
Floor
03
Room
367
Print Ticket On Next Batch Run
Right click on the WO number then choose Cost Summary

3.