FMS 913 How to Create and Use Workbenches

This training guide will show you how to create and use workbenches to quickly view information. You will learn how to choose filters and display order to create workbenches specific to your needs.

Before you begin . . .

Upon completion of this guide you will be able to:

- Sign in to FAMIS
- Create a workbench with specific information
- Understand how workbenches can filter for specific information

Who has access?

All FM Staff.

What does it affect?

Workbenches display data on service requests, work orders, projects, etc. and can be sorted and filtered for specific information.

How to log in?

Contact the Help Desk for security access to FAMIS.

Additional Resources

http://cafe.northwestern.edu/training/

Where to get help? For assistance, contact NUIT Support Center at 847-491-HELP (4357), or email consultant@northwestern.edu
Getting Started: Navigating to Service Request Workbench

A Workbench is a tool to filter and display data. By creating your own private workbenches you can see data specific to your job responsibilities and in a format that is most efficient for you. As an example, we will use the Service Request Workbench.

Create QuickPick button for yourself! (right click in left margin, choose add a QuickPick button, choose Form, select Service Request Workbench application and label button, click Finish)
Step 1: Creating a Workbench

The default folder view for Service Request Workbench is **All Active Service Requests**. This Workbench shows all active service requests sorted by (1) Start Date and (2) Priority, with nothing filtered out. It is refreshed each time you exit. Use this workbench as is, or use it as a basis for creating a workbench tailored to your needs.

**Preset Workbenches:**

Look in the Folder drop down menu to see other preset workbenches. For example, the **Ready for Customer Service Review** workbench displays all service requests that are ready to be processed into work orders. (Most service requests do not need approval; only service requests from CAs need approval from the Housing Office.) Another example, the **Estimate Requests** workbench displays all estimates with a maintenance type of ESTIMATE and a status of REQUESTED.
Step2: Creating a new Workbench and Naming the Workbench

Always click the Duplicate button first to create a copy of the complete list. If you do not Duplicate the workbench first, you will be changing the shared workbench. Use a short, specific name for your new workbench.

IMPORTANT NOTE: You need to Duplicate the original so you don’t change the shared workbench and have a basis to return to when you want to create a different filtered workbench.

Note: Workbenches are public and visible to all users unless you click the Private box in the Edit Folder.
Step 3: Filtering and Displaying a Workbench

Click the Filter tab. For example, if you would like to filter for all Custodial requests on the Evanston Campus buildings, you would click the drop down box next to the Site field and choose EV and next to the Maintenance Type field, choose Custodial.

Click the Display tab; select a Primary and Secondary sort. Select the Display Order of the Columns. You cannot delete columns, only change the order.

To change Display Order, select a field and move up or down in display order using Move Field buttons.
Finishing Up: Viewing your new Workbench

Click the X in the upper right corner of the Main FAMIS page to exit FAMIS.

Nice to Know tip:
- If you want to Edit a workbench, select it in the Folder menu box and click Edit to make changes. Be careful to note if you are editing a shared or private workbench.
- It is good business practice to not edit a workbench that you didn’t create.
- If you want to Delete a workbench, select it in the Folder menu box and click Edit to open the Edit Folder (same as Step 2 above) and click Delete to remove workbench.
- You must exit and open a workbench to refresh any changes you made to records.