FAMIS Navigation Basics

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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
Signing on to FAMIS for the First Time!

- You may encounter an Oracle J initiator dialogue box asking you to install and run the J initiator, **click Yes**. Follow the installation process to completion.

- If you get a notification to install Active X Controls, **click Yes to install**.

- You may get a dialog box asking you to **grant access**, **click Grant Access Always**.
Signing on to FAMIS for the First Time! - continued

- If you get a dialogue box about Pop Up blockers (mostly when you use reports or help menu), select temporarily allow or allow on this page. This will be on the gray screen window.

- You have been assigned to one or more user groups based on your job responsibilities in FAMIS. You have access to those specific sections of FAMIS.
Navigation Tips and Quirks

- You will see two windows open. The gray screen runs in the back and reports open in this screen. The active screen is where you find the forms and records of FAMIS.
- Click “+” sign to expand system tree.
- Fields need to be entered in certain orders. If you are unsure, the FAMIS message bar will tell you what needs to be done.
- Service Request numbers and Work order numbers are not the same.
- When you enter a value in a Number field, tab to next field and sometimes the description or other information will populate.
- Sometimes, you need to finish completing the required fields, before you can edit any fields.
- Sometimes, you may need to exit the form to reset it and enter data.
- This button is found throughout FAMIS and generally will take you to a table to select specific information for a field.
- FAMIS requires entry into all yellow fields before allowing you to move to another tab or form.
- Even though FAMIS doesn’t require an entry in a field, fill in as much information as possible!
- You know you are in Query mode when fields are blue in color.
- In the Workbenches, there are scrollbars along the side and the bottom.
- You can select a record by double clicking, by clicking the or box at the beginning of a row and clicking OK or View.
• FAMIS sometimes saves data before closing a form, but sometimes not. When in doubt, click to save the data you have entered.

• You can exit a form, by clicking **OK** or the **X** in the upper right hand corner.

• The top green border in Forms screens is dark green when active, light green when inactive.

• Stuck? Look for open dialogue boxes behind open forms. (use the Window drop down menu in the menu bar to see all open windows)

• To refresh a workbench, you need to exit and reopen the workbench.

• Try right clicking in a field to see view, edit or other options. (ex. right click on a WO number in workbench and you can bring up a cost summary form.)

• Auto e-mails are sent out when a Service Request is created, when a Work Order is closed, when a Maintenance Project is created, and when a Maintenance Project is closed.

• Error messages and Field information can be found in the gray message bar at the bottom of the screen.
## FAMIS Icons

<table>
<thead>
<tr>
<th>Icon</th>
<th>Functionality</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image1" alt="Icon" /></td>
<td>To Save the data entered in form</td>
</tr>
<tr>
<td><img src="image2" alt="Icon" /></td>
<td>To Print Screen</td>
</tr>
<tr>
<td><img src="image3" alt="Icon" /></td>
<td>Cut, Copy, Paste (not useful in FAMIS)</td>
</tr>
<tr>
<td><img src="image4" alt="Icon" /></td>
<td>To Enter a Query, to begin a search</td>
</tr>
<tr>
<td><img src="image5" alt="Icon" /></td>
<td>To Execute a Query, to run the search</td>
</tr>
<tr>
<td><img src="image6" alt="Icon" /></td>
<td>To Count number of hits or entries from search</td>
</tr>
<tr>
<td><img src="image7" alt="Icon" /></td>
<td>To Cancel Query, to stop the search</td>
</tr>
<tr>
<td><img src="image8" alt="Icon" /></td>
<td>To Insert new record</td>
</tr>
<tr>
<td><img src="image9" alt="Icon" /></td>
<td>To Duplicate a record</td>
</tr>
<tr>
<td><img src="image10" alt="Icon" /></td>
<td>To Delete a record</td>
</tr>
<tr>
<td><img src="image11" alt="Icon" /></td>
<td>To Clear all information in record</td>
</tr>
<tr>
<td><img src="image12" alt="Icon" /></td>
<td>To Navigate through a series of records</td>
</tr>
<tr>
<td><img src="image13" alt="Icon" /></td>
<td>To Attach a file to the record</td>
</tr>
</tbody>
</table>
How to Perform a Query or Search

FAMIS has several different methods for searching for records or data. Not all methods work in all forms and fields. **Make sure your cursor is in the field you want to search in!** (Otherwise, you can unintentionally clear a field or record.)

- **Use Query Icons**
  - Click **Enter Query** icon,
  - If appropriate, enter partial data using % wildcard symbol (ex. %ROB%)
  - Click **Execute Query** icon,

- **Use List Values**
  - Select **List Values** in **Edit** drop down menu
  - Right click in field and select **List Values**

- **Use F9** key to list data options for field

- **Use F7 key** and **F9 key** as shortcuts for the Enter Query and Execute Query icons

- **Use Find button** on some forms

Other Query Functions:

- To stop a query, click ✍

- To count how many records a query will produce, click **Enter Query** 🔍, click **Count Hits** ✍. Look in gray message bar for number of records, click **Execute Query** ✍ to complete query or click **Cancel** ✍ to stop query.
How to Add QuickPick Buttons for Easy Access

Delete or edit these buttons later, by right clicking on them. Use these buttons to quickly access areas you use often!

Right click in margin and select Add Quickpick Button

Select Form

Click Next

Select Application from menu

Type Button Label

Click Finish
Reports and Printing in FAMIS

- In any of the workbenches or FAMIS forms, use the File drop down menu, select **Print Screen** to literally print the screen.

- Once a **Work Order** is scheduled it will be sent electronically to a shop to be printed and distributed to technicians for completion. (note: on Work Order form there is a check box for printing WO)

- You can locate a specific report by opening the system branches to locate reports for specific topics. See the **Report Matrix** for a list of reports samples of the reports. There are delivered reports in the FAMIS application and customized reports in Cognos.
Reports and Printing in FAMIS

You can enter parameters to limit results in a report. You must enter the parameter exactly. The wildcard % does not work in report parameters.

The report will be generated as a PDF which you can save and print.
Reports and Printing in Cognos

Cognos has other reports which may be more useful than the ones found in FAMIS. See the Report Matrix for a list of reports samples of the reports.
How to Attach a Document to a Record

To attach a document to a record, click the Attachment icon. Make sure you add a description when adding a document to display in attachment list.

Note: Select a document and click View to review an attached file.
I’m Stuck, Now What?

- Make sure you have entered all the required yellow fields.
- If FAMIS gets stuck in a circular dialogue box pattern, sometimes after several repetitions, you will get option to close, or close out form and start again.
- If FAMIS gets stuck in a query, you may need to stop the query by clicking \( \text{Stop} \) and try again.
- If FAMIS gets stuck, you may need to clear the record by clicking \( \text{Clear} \), (simply backspacing in fields won’t work).
- If FAMIS gets stuck, click \( \text{X} \) and back out of form to try again.
- If FAMIS gets stuck, look behind open forms for dialogue boxes. (Use the Window drop down menu to see all open windows)
- If FAMIS gets stuck, try doing a query and then clicking the Delete \( \text{Delete} \) and/or Erase \( \text{Erase} \) buttons to escape out.
- If FAMIS gets stuck, click to activate gray screen window and click \( \text{X} \) to exit FAMIS completely.
**Glossary**

**Forms**- the screens, pages, or windows in FAMIS.

**Service Requests**-a request from a customer for a service or estimate. It can be created in self service and forms. A service request initiates the process and is turned into a work order.

**Work order**-Once a service request has been assigned to a crew/shop and the billing verified, it becomes a work order by changing the status to SCHEDULED. A work order is ready to be assigned to an employee for completion.

**Procedure Library**-a collection of common procedures containing information such as description, task list and prompt questions, maintenance types, used to assist in categorizing service requests for reporting purposes.

**Express work orders**-work orders entered after the fact of an event or emergency. These should not be used for any work requested by non-FM personnel nor charged to a department account (not a building). Note that there are some buildings where departments are charged for building charge work (e.g., Chicago buildings where the Medical School gets part of the building charge); express work orders should not be used for these.

**Standing work order**-similar to a current blanket work order. Used in FAMIS for recurring work. Used in FAMIS for labor entries for vacation, jury duty, funeral leave, sick time, personal days. These should not be used for preventive maintenance.

**Parent/Child work orders**-the linking work orders in a hierarchal manner.

**Crew**-FM shop

**Seller**-FM shop (or account that will get revenue for the work)

**Buyer**-Customer, school unit or department, or building charge—whichever account being charged for the work

**Requestor**-person requesting the service, main contact person for further information

**Chart string**-account number

**Workbench**-a listing of records which can be searched, duplicated, and customized by filters.
Glossary-continued

**Maintenance project**—a service request that will involve more than one crew.

**Preventive Maintenance**—a process of scheduling set maintenance tasks on a regular basis for specific equipment.

**Warehouse**—a warehouse is location for storing parts for work orders. It has been called previously storeroom, stockroom or closet.

**Maintenance Issue**—a tracking number for transfers and receipts of parts.

**Direct part**—a part ordered for a specific work order

**Stock part**—a part held in a warehouse