FMS 920 How to Generate a Work Order

This training guide will show you how to generate a work order from a previously created Service Request.

Before you begin . . .

Upon completion of this guide you will be able to:

- Sign in to FAMIS
- Recognize FAMIS navigational elements
- Enter all necessary information to generate a work order

Who has access?
All FM Customer Service.

What does it affect?
This process replaces the current process of creating work orders.

When is this used/not used?
This is to be used for any non-Emergency requests for repairs or service.

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 Work Bench

Create QuickPick button for yourself! (right click in left margin, choose add a QuickPick button, choose Form, select Service Request Work Bench application, and label button, click Finish) See Navigation Basics Training Guide for more detailed instructions.
Step 1: Opening a Service Request

You should be able to see all active Service Requests from schools, departments, and internal FM. Select the Ready for Customer Service Review workbench. Service Requests with a status of REQUESTED are ready to be reviewed and processed.

NOTE: In order to refresh the information in the Workbench, you must close the Service Request Workbench and reopen it.

Nice to Know Tip: Remember, if you want to sort or filter the All Active Service Requests, create a new workbench. See How to Create and Use Workbenches Training Guide.
Step 2: Review All Information

Review all information in the Service Request. Make sure all the information is fully completed and correct. If necessary, contact the Requestor to get additional information regarding the Location, Billing, Work Plan Task List, Outage Class and Attributes tab. The information provided assists the technicians in completing the work order.

Review Checklist:
1. Description
2. Requestor Information
3. Location
4. Type and Priority
5. Billing (see note below)
6. Work Plan (Outage class and Task List needs to be detailed enough for work to be completed.)
7. Check Dups
8. Attributes Tab (access arrangement, etc.)

IMPORTANT NOTE about BILLING: Service Requests entered through Self Service may not have Billing information and may need to be added. Billing is either a building charge or to a specific department. See Billing steps in How to Enter a Service Request for more billing information.
Step 3: Select Crew and Change Status for Service Request

Assign work to appropriate Crew for completion.

Nice to Know Tip: You can assign a WO to technician here, if appropriate, by selecting an employee from the Assigned To menu.
Finishing Up
To view the Work Order Number assigned, click on the Other tab and look at WO Number field.

Click X in upper right corner to close Work Order. You will return to the Service Request Workbench where you can open another service request to convert to a work order. The work order will print in the shop/crew assigned.

Note: The Service Request Status will still read as Requested in the workbench. You will need to refresh the Service Request Workbench by closing it and reopening it.