FMS 920 How to Manage a Maintenance Project

This Training Guide will demonstrate how to create and manage a maintenance project from a service request.

Before you begin . . .

Upon completion of this guide you will be able to:
- Sign in to FAMIS
- Recognize FAMIS navigational elements
- Convert a Service Request to a Project
- Manage a maintenance project

Who has access?
All Customer Service staff. Staff must have the appropriate security access to the FAMIS application.

What does it affect?
Creation and management of service requests with multiple discipline needs, outsourcing, phasing or sequencing requirements.

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 a Service Request

Locate the Service Requests Workbench branch in the system tree.

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: Review Service Request and Convert to Project

Open the Service Request and **review all details including Billing and Work Plan**. If Service Request will use multiple shops, be outsourced, require phasing or sequencing, be overseen by a Project Manager, or require multiple work orders, it should be converted to a project. Note phase billing later in the guide.

Status Field now reads **CONV PROJ**. Save and Close Service Request.
Step 2: Open a Maintenance Project

Nice To Know Tip: Double clicking on a project row will display the Project. Selecting View Plan will display Project Plan with phases.
Step 3a: Creating Phases in a Project

Click Phases

Click Add
**Step 3b: Creating Phases in a Project**

To add a Phase, begin with the Procedure Library and then complete other details in General Information, Phase Type, Primary Labor, Task List and Attributes.

1. Use Procedure Library to create a Phase.
2. Set Status to SCHEDULED to create a WO or set Status to APPROVED to delay scheduling of WO until later.
3. Verify Phase Type as PLANNED and uncheck Print box.
4. Select Crew, Craft and complete other information.
5. Enter details in Task List.
6. Complete Attributes, as applicable

Click **OK** to Save
Click **Yes** to Close Phase
Note WO Number for Phase

Each Phase becomes a work order and is listed in the Current Schedule workbench. It must then be assigned to a Crew and Employee for completion similarly to all other work orders. Also each Phase may have a different Billing chart string. See Billing for a Phase in a Project below.

**Note:** You need to generate a work order for Phase 1.
- Select Phase 1 row
- Click View
- Change Status to Scheduled or Approved
Step 3c: Creating Phases for others in a Project

If a Supervisor or Project Manager would like to have a Phase created for a project, they should enter a service request into FAMIS Self Service. Next, the Customer Service staff will review the service request and transfer the information from the service request to a specific project by creating a new Phase with the information. Customer Service then changes the status of the service request to SUPERSEDED.
**Step 3d: Billing for Phases in a Project**

Many times Phases have different Billing chart strings. FAMIS will automatically populate the chart string from the original Service Request. The Billing for EACH Phase must be overridden.
Step 3d: Billing for Phases in a Project

1. Click the Override Billing checkbox
2. Click Billing

Click Save and OK to exit Phase form.
Step 4: Scheduling Approved Phases in a Project

Phases can be scheduled immediately as a Work Order by setting a status of SCHEDULED. Phases can be set with a status of APPROVED and converted into a Work Order at a later date in sequencing a project.
Step 5a: Completing Work Against a Maintenance Project

First, when work orders are completed for a Project, they should be marked complete; this can be done in multiple places in FAMIS. To do this from the Project Workbench, select the Project row and click Work Orders button at the bottom, double click on each work order and change status to complete.

Second, open a Phase in a Project to change its status.

To Open Phase Summary in Project:
1. Locate Project Number.
2. Click in any field.
3. Click View Plan button.
4. Click Phase button.

Note: Work order status and Phase status are independent of each other and must each be updated.
Step 5b: Completing a Maintenance Project

In Project Plan form, change status to COMPLETE.

Note: The Project Workbench will not display Complete status until the form is refreshed.
Step 6a: Closing a Maintenance Project

First, when work orders are completed for a Project, they should be marked closed; this can be done in multiple places in FAMIS. To do this from the Project Workbench, select the Project row and click Work Orders button at the bottom, double click on each work order and change status to closed.

Second, open a Phase in a Project to change its status.

To Open Phase Summary in Project:
1. Locate Project Number.
2. Click in any field.
3. Click View Plan button.
4. Click Phase button.

Note: Work order status and Phase status are independent of each other and must each be updated. All Work Orders and Phases must be closed before the Project can be closed.
Step 6b: Closing a Maintenance Project

In Project Plan form, Change Status to Closed.

1. Change Status to Closed
2. Click Save
3. Click to close

Note: If a project needs to be placed on hold for any reason, keep status as Open to keep charges from being processed.

Note: The Project Workbench will not display CLOSED status until the form is refreshed.