FMS 940 How to Update a Work Order

This training guide will show you how to update a work order.

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 update a work order

Who has access?
All Supervisory personnel and their designees as appropriate. Personnel must have security access allowing them to update WOs in FAMIS application.

What does it affect?
This process replaces the current process of assigning, updating status, updating tasks, and hours of Work Orders.

When is this used/not used?
This process is used to assign staff to work orders, update status of work orders, update tasks, attaching files and manage hours for Work Orders.

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 NUIIT Support Center at 847-491-HELP (4357), or email consultant@northwestern.edu
Getting Started: Navigating to Work Order

Create QuickPick button for yourself! (right click in left margin, choose add a QuickPick button, choose Form, select Current Schedule application and label button, click Finish.)
Step 1: Open Work Order to be Updated

Locate a preset workbench in Folder drop down menu. To create filtered workbenches, see How to Create and Use Workbenches Training Guide.

To search for a specific Work Order:

1. Click Enter Query
2. Enter WO Number
3. Click Execute Query
4. Double click in row to open WO
Step 2: Updating a Work Order

The main reason for updating a Work Order is to assign a technician, update the current status, Primary Labor information, Tasks List tab and attach files to a work order. If you have changes to General Information, Location, or Billing, leave the Status as Open and notify Customer Service to make revisions.
Step 3: Updating a Work Order – Assigned To

Search Tip:
After clicking , use % wildcard to limit search.
Ex. %YOUN%

Or, if you know the Employee Id, enter in Employee field.
**Step 4: Updating a Work Order – Primary Labor**

- **Note:**
  - The Crew will have already been selected when Customer Service reviewed the service request and created the work order.
  - **Estimated hours** are standardized hours for this work order as set in Procedure Library.
  - **Current Estimated Hours** are a modification to the estimated hours given specific needs of work order.
Step 5: Updating a Work Order – Current Status

The Current Status field is the way to know where a work order is in its progression toward completion.

<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assigned</td>
<td>WO has been assigned to an individual</td>
</tr>
<tr>
<td>Auth Hold</td>
<td>On Hold pending requestor authorization</td>
</tr>
<tr>
<td>Complete</td>
<td>WO is complete, awaiting customer approval and finalization of billing information</td>
</tr>
<tr>
<td>Contact FM</td>
<td>Customer should contact FM for additional information</td>
</tr>
<tr>
<td>DT Hold</td>
<td>On Hold due to downtime (e.g., equipment downtime, space unavailable)</td>
</tr>
<tr>
<td>Fund Hold</td>
<td>Issue with funding source, billing</td>
</tr>
<tr>
<td>Hold</td>
<td>WO is on hold</td>
</tr>
<tr>
<td>In Prog</td>
<td>WO is in progress</td>
</tr>
<tr>
<td>Open</td>
<td>WO is open, hasn’t been assigned</td>
</tr>
<tr>
<td>Parts Hold</td>
<td>WO is waiting for parts</td>
</tr>
<tr>
<td>PO Hold</td>
<td>WO is on hold waiting for a PO</td>
</tr>
<tr>
<td>Scheduled</td>
<td>WO has been scheduled to a crew or shop for completion, but not yet assigned</td>
</tr>
</tbody>
</table>

Click ☐ to save the Work Order.
Step 5: Updating a Work Order – Task List and Attaching files

In Work Order Attachments form, click **New** button and follow menus to add notes and files. Select an attachment and click **View** to see attachments. (see Navigation Basics Training Guide for detailed instructions on attachments)
HOT TIP! Check out the Facilities Workbench

The Facilities workbench helps you quickly look at service requests and work orders by building!