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Facilities Services-Business Analytics		
 Facilities Services		
 EQUIP_TECH Navigation Training Reference Guide		

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1. Objective

In response to Employee Engagement Item#53, to provide FOM technicians access to work order history data in FAMIS, this training manual addresses the methods necessary for technicians to review and add EQ work order history.

This document is designed to guide users through FAMIS navigation under the **EQUIP_TECH** role. This training is not comprehensive, but focused on the basic **EQUIP_TECH** role functions within FAMIS. You will learn how to:

- Launch FAMIS
- Query Equipment
- Review/Add equipment notes - service history notes
- Review WO History
- Review WO Task List

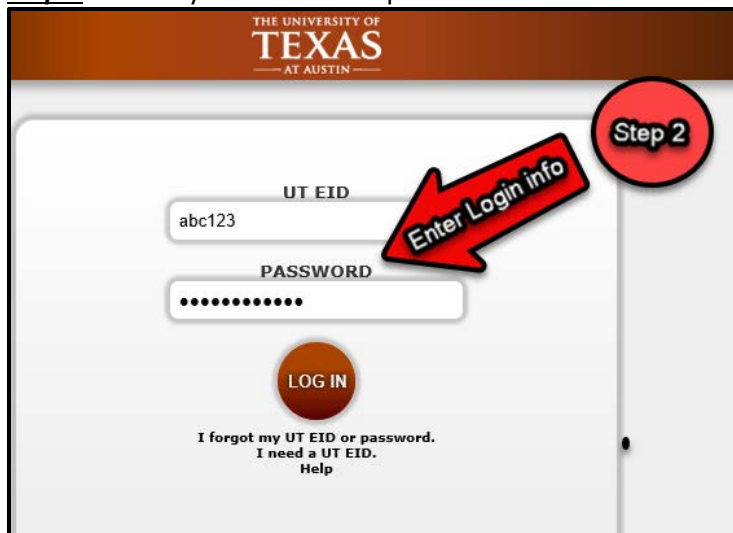
2. FAMIS Navigation Overview

A. **Access FAMIS** – Follow these 3 simple steps to access FAMIS

1) **Step 1** – Double-Click the FS First icon on your desktop:



2) **Step 2** – Enter your UT EID and password:



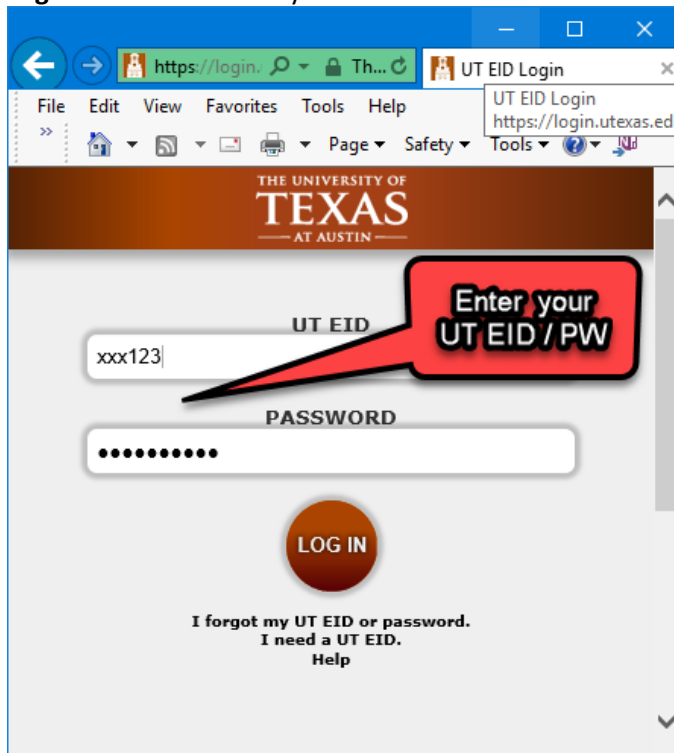
3) **Step 2** -Single-Click the **FAMIS** icon

The screenshot shows the FS FIRST website interface. At the top, there is a navigation bar with 'Facilities Services' and the 'TEXAS' logo. Below this is a search bar and a 'Select Language' dropdown. The main navigation menu includes 'NEWS', 'SAFETY & TRAINING', 'ORGANIZATION', 'STANDARDS', 'ENGAGEMENT', and 'RESOURCES'. A secondary menu below the navigation bar contains 'View', 'Edit', 'Revisions', 'Clone content', and 'Layout Editor'. The main content area features a large blue banner titled 'TIMESHEET DEADLINES' with an illustration of a hand holding a calendar and a clock. A red circle with the text 'Step 3' is overlaid on the banner, and a large red arrow points from this circle to the 'FAMIS' icon in the 'Quick Actions' section. The 'Quick Actions' section contains icons for 'EVENTS', 'EMAIL', 'FAMIS', and 'TIME SHEETS'. To the right of the main content is a 'Weather' widget for Austin City, Austin Camp Mabry, TX, showing current conditions as overcast with a temperature of 69°F. Below the weather widget is an 'Edit Promo List' button. At the bottom of the page, there is a 'Welcome to FS FIRST!' message and a brief description of the website's purpose.

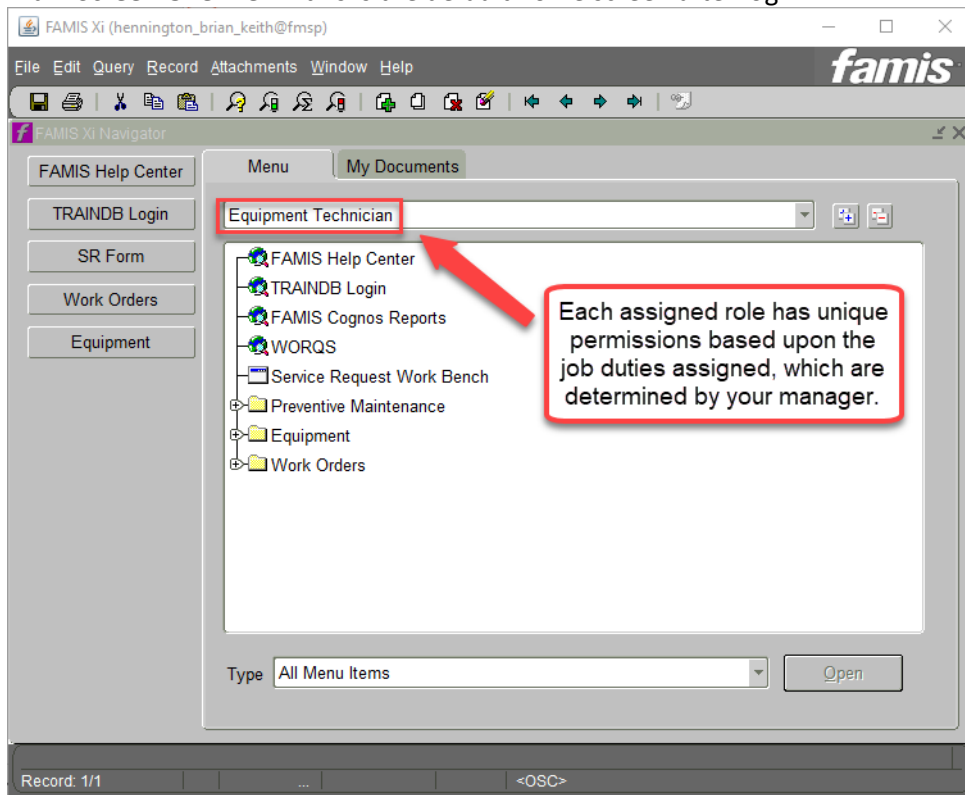
- 4) **Step 3** - Now Single-Click the **FAMIS** icon, upon landing on the WORQS wiki site:
<https://wikis.utexas.edu/display/WORQS/FAMIS>

The screenshot shows the 'WORQS Home' page on the University of Texas at Austin wiki. The page includes a search bar, a page tree on the left with links to 'FAMIS', 'REPORTS', 'Move Support', and 'WORQS Updates', and a main content area with the 'WORQS' logo and 'Facilities Services' branding. A red circle with the text 'Step 3' is placed over the 'FAMIS' link in the page tree. A red arrow points from this circle to the 'FAMIS' link in the 'Quick Links' section on the right side of the page. The 'Quick Links' section also includes links for 'TRAIN' and 'WORQS'. Other sections on the page include 'About WORQS', 'New Improved Features starting 7/10/2017', and 'Helpful tips:'. The browser's address bar shows the URL 'https://wikis.utexas.edu/display/WORQS/WORQS+Home'.

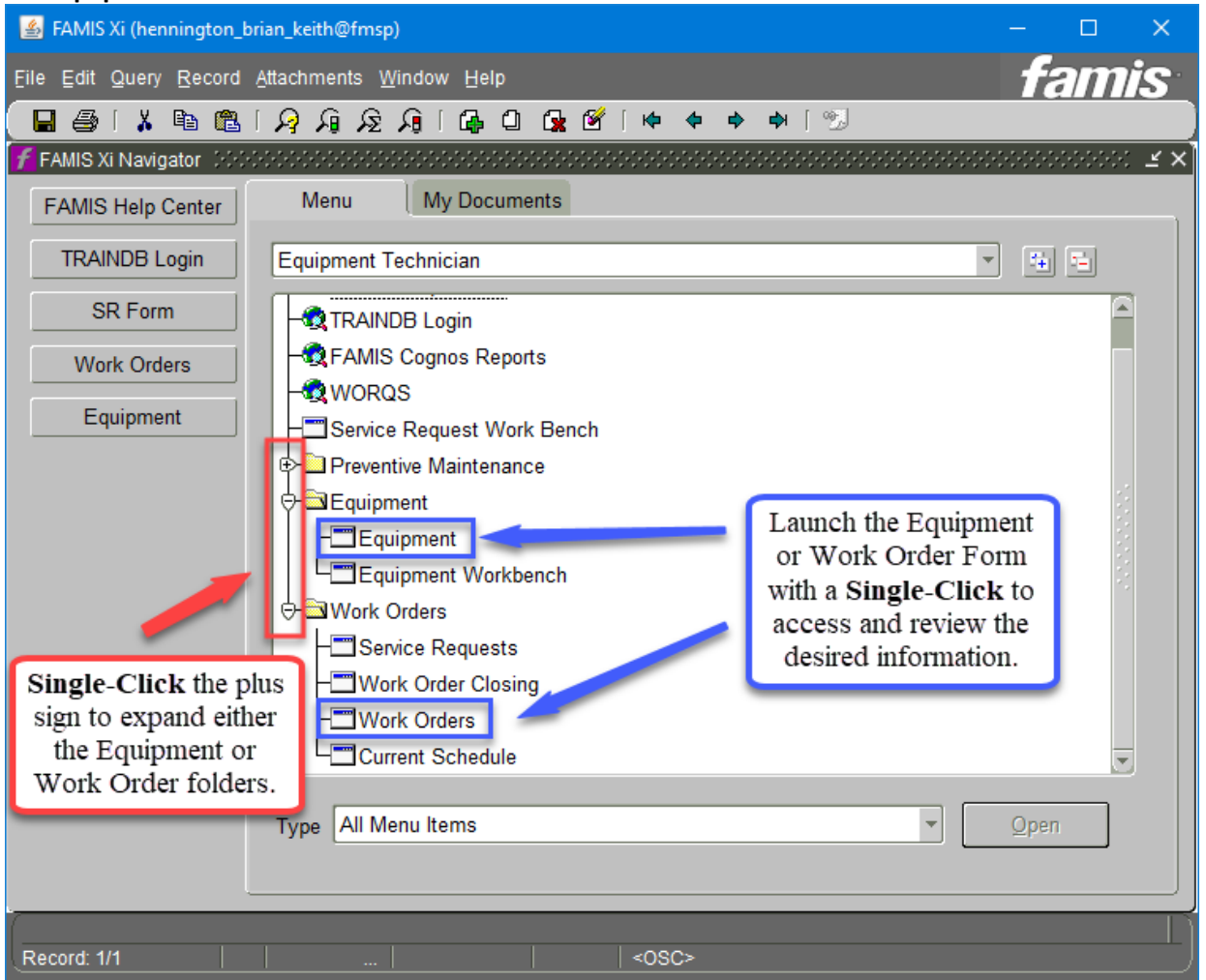
B. Log into FAMIS – Enter your UT EID and Password



C. Main Screen Overview - this is the default home screen after log in.

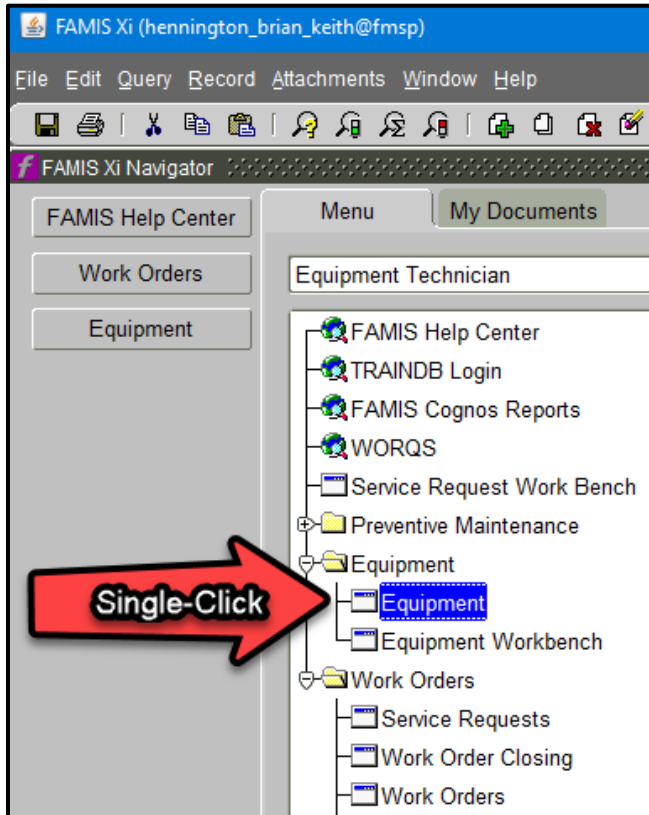


D. **Equipment and Work Order Forms in FAMIS** - are used to review the desired information.




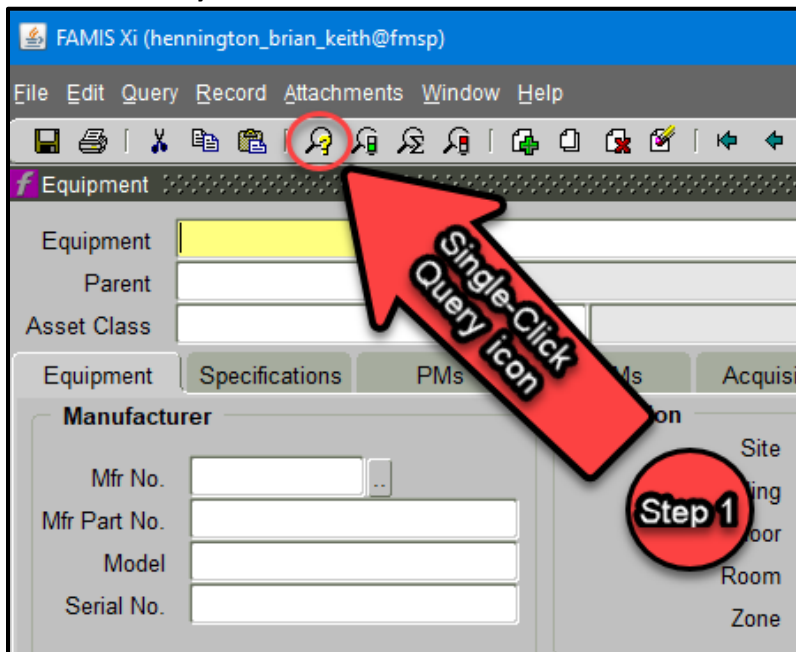
3. Equipment Form

A. Launch the Equipment Form



B. Enter Query Mode


 - Click **Query icon** – the searchable fields will turn blue

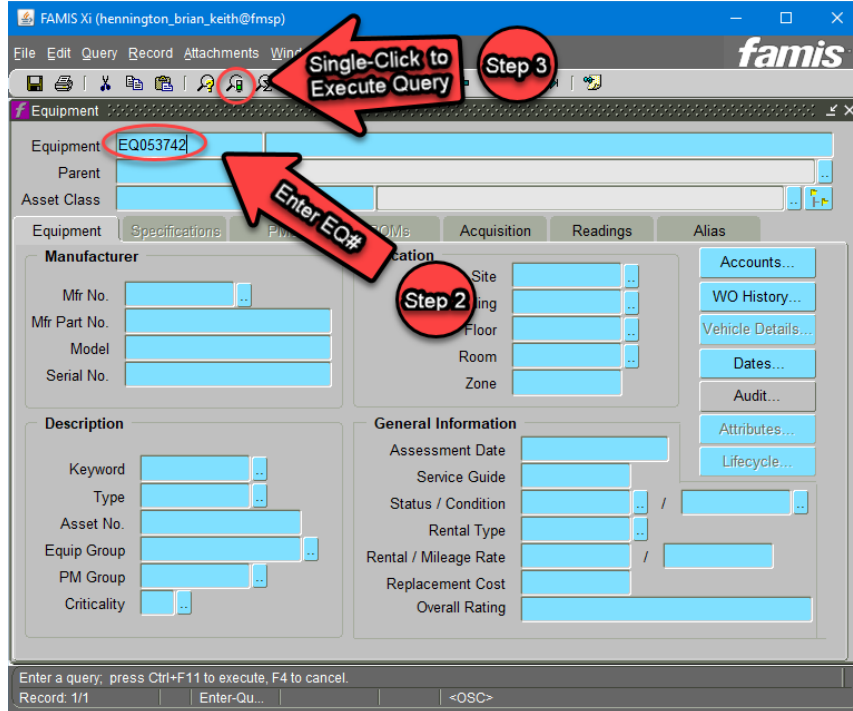


C. Execute Query Mode

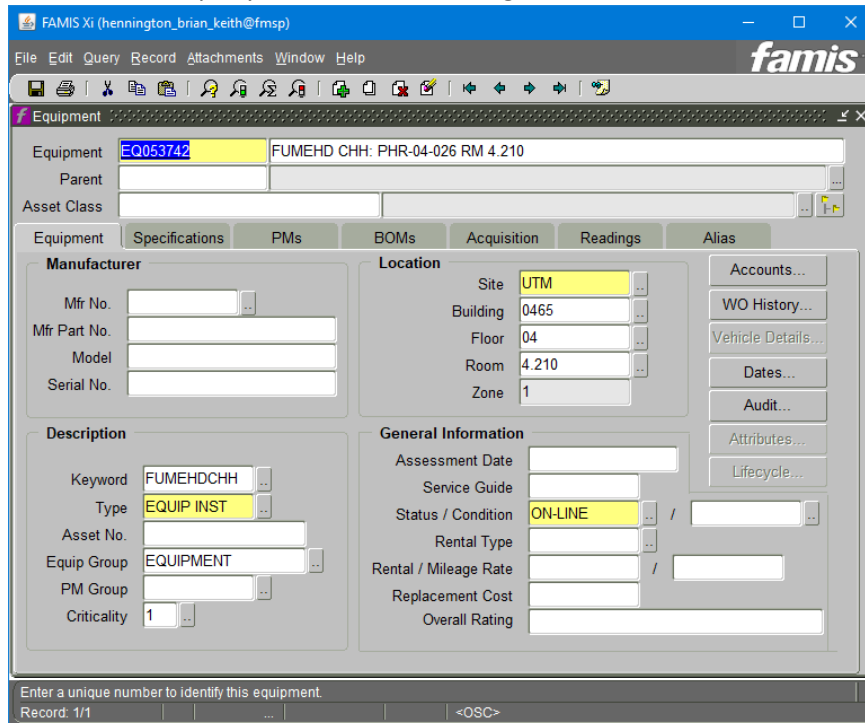
The blue fields allow multiple search criteria to be entered.

NOTE: Detailed and specific criteria helps return more unique records.

1.  - Enter the **EQ053742**, then click **Execute Query** to return data results.

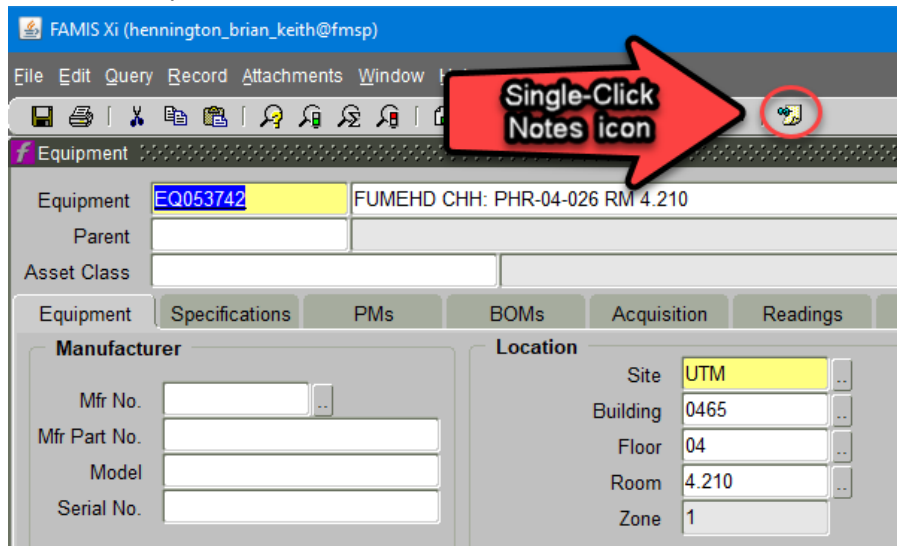


2. The **EQ053742** query returns the following data results.



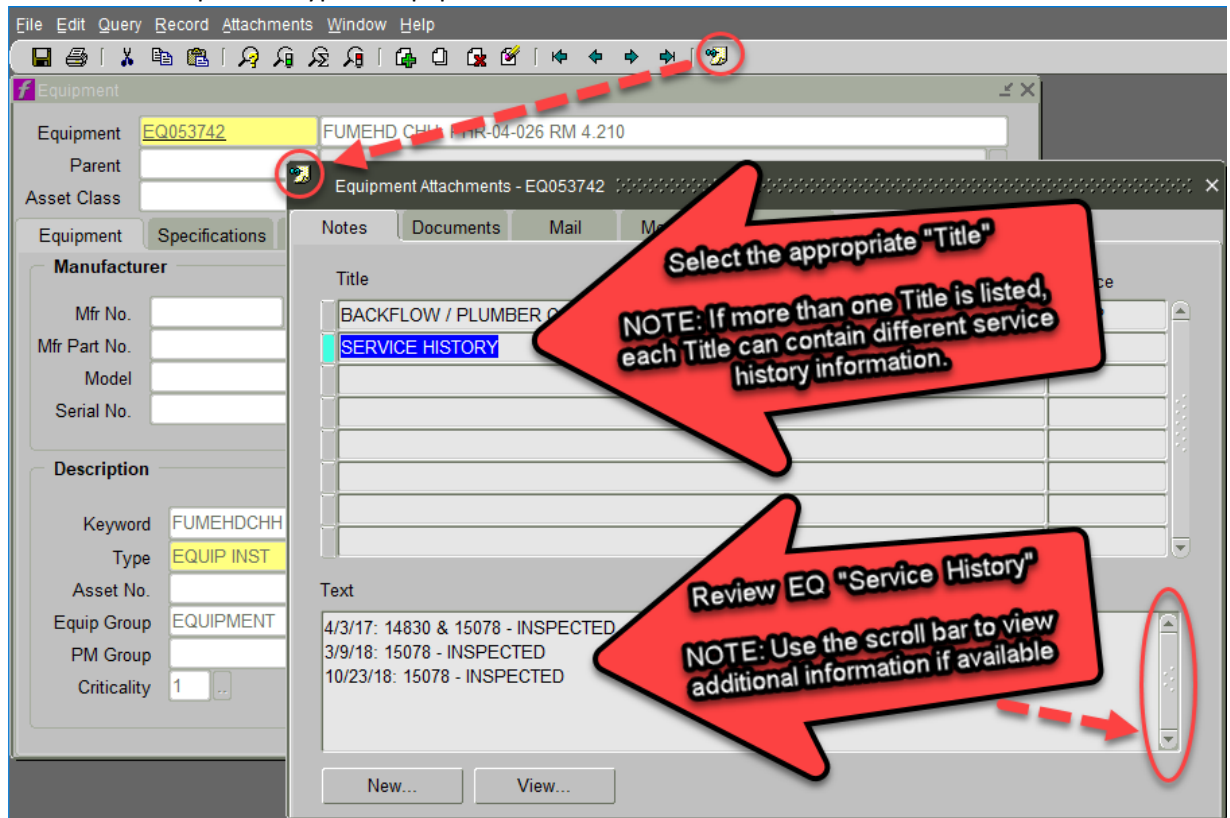
D. Launch EQ# Notes and Review Service History

1. The **Notes** icon launches the **Equipment Attachments Form** which allows access to the service history records of the EQ#



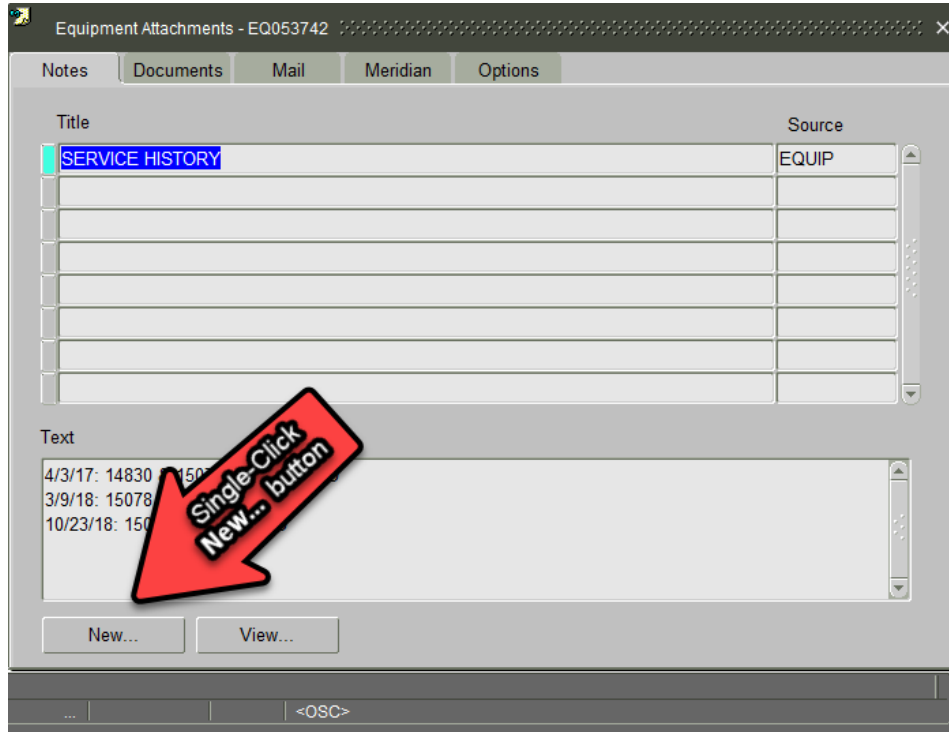
2. The **Equipment Attachments Form** displays the service history records of the EQ#. Within the Text comment box, the "Service History" notes are displayed for review.

NOTE: Multiple "Titles" may be listed and each could contain a variety of information based upon the type of equipment.

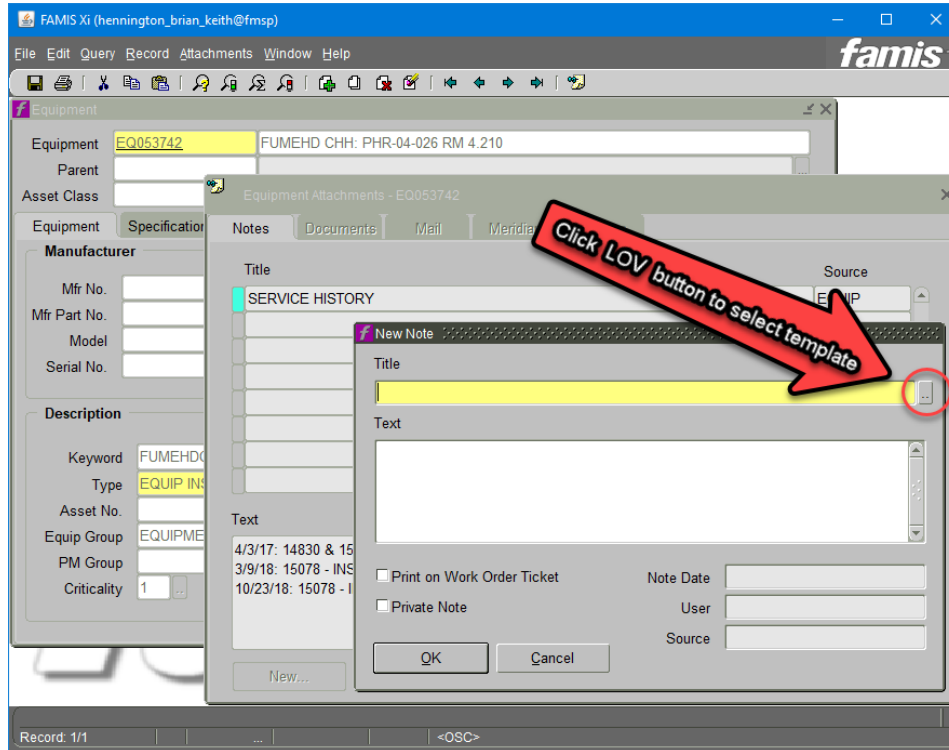


E. Enter New Service History Notes for EQ# Record

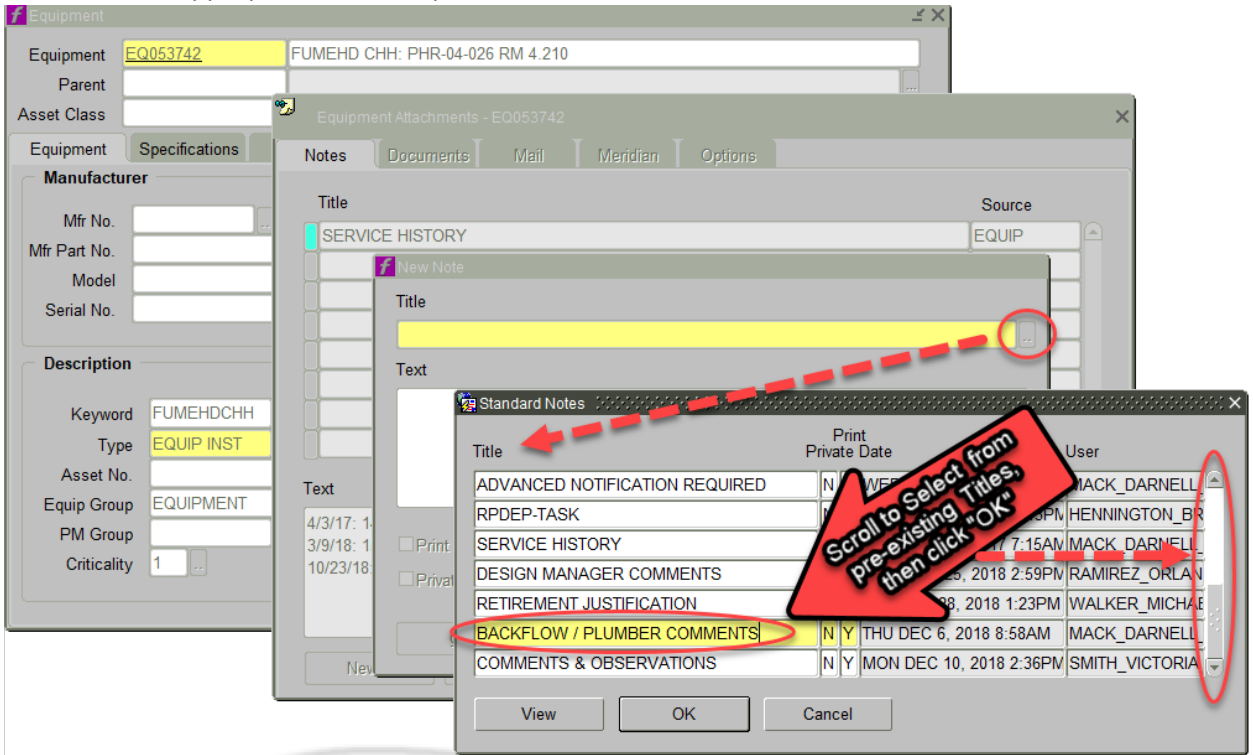
1. Click the **New...** button to enter a new Note



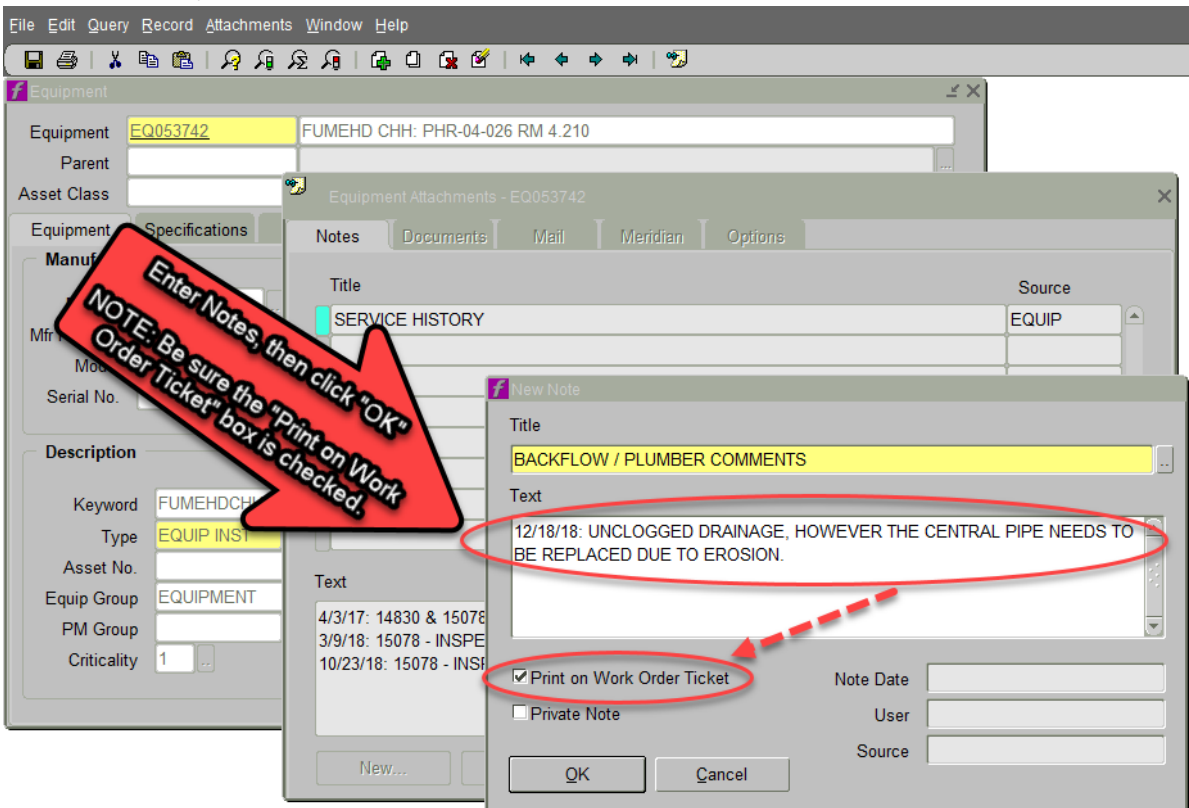
2. Click the **LOV (List Of Values)** button



3. Select appropriate Title template, then click **OK**



4. Enter New Note within the Textbox, ensure the “Print on Work Order Ticket” box is checked, then Click **OK**. Close all windows when finished.



5. Select the 1st Title "Backflow/Plumber Comments" to review the new Note.

The screenshot displays the 'Equipment Attachments - EQ053742' window. The main window shows equipment details for 'EQ053742' (FUMEHD CHH: PHR-04-026 RM 4.210). A sub-window titled 'Equipment Attachments - EQ053742' is open, showing a table of notes. The first row is highlighted in blue and circled in red, with a red arrow pointing to it from the text 'Single-Click "Backflow/Plumber Comments" Title'. The second row is 'SERVICE HISTORY'. Below the table, the 'Text' field is circled in red, with a red arrow pointing to it from the text 'Review the New Note'. The text in the field reads: '12/18/18: UNCLOGGED DRAINAGE, HOWEVER THE CENTRAL PIPE NEEDS TO BE REPLACED DUE TO EROSION.' The table has columns for 'Title' and 'Source'. The 'Source' column shows 'EQUIP' for both rows.

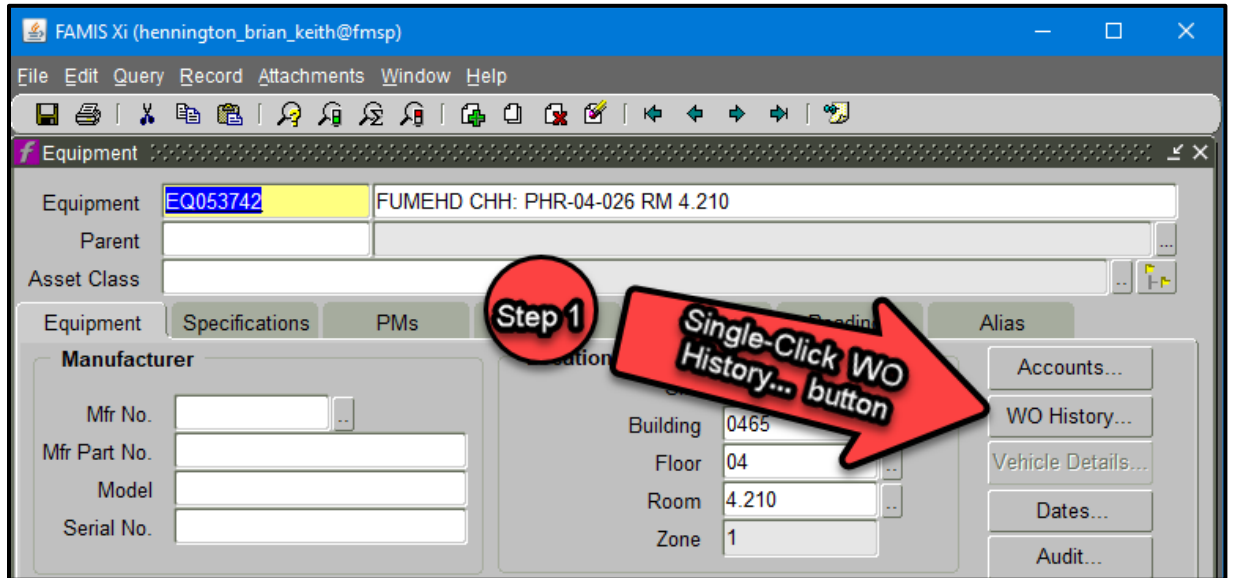
Title	Source
BACKFLOW / PLUMBER COMMENTS	EQUIP
SERVICE HISTORY	EQUIP

Text

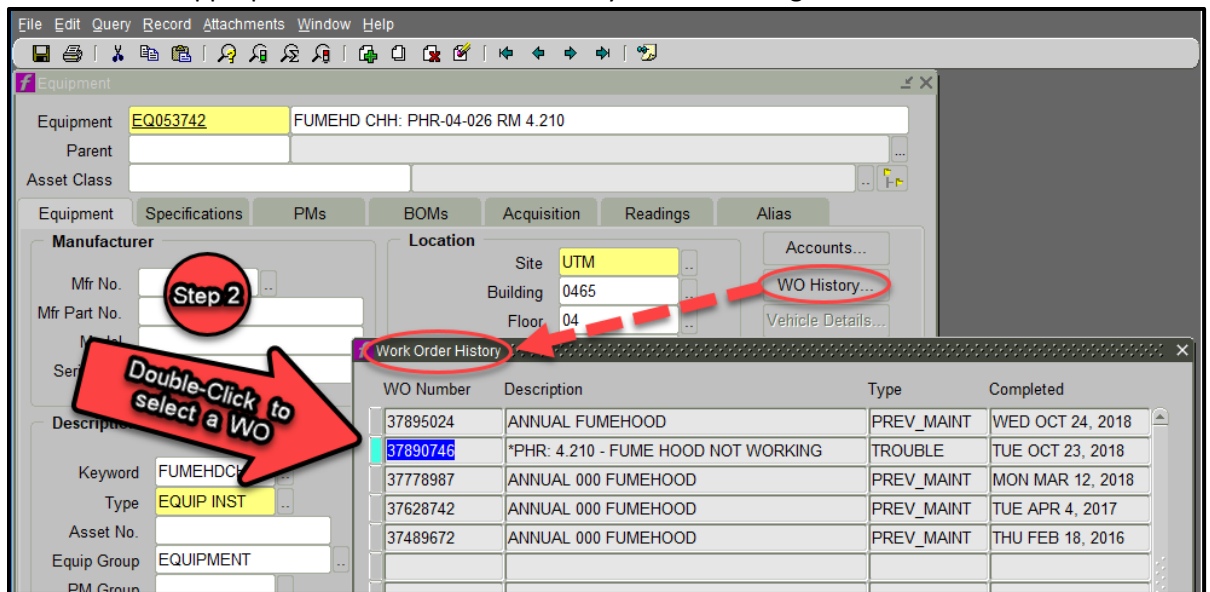
12/18/18: UNCLOGGED DRAINAGE, HOWEVER THE CENTRAL PIPE NEEDS TO BE REPLACED DUE TO EROSION.

F. Launch EQ# Work Order History

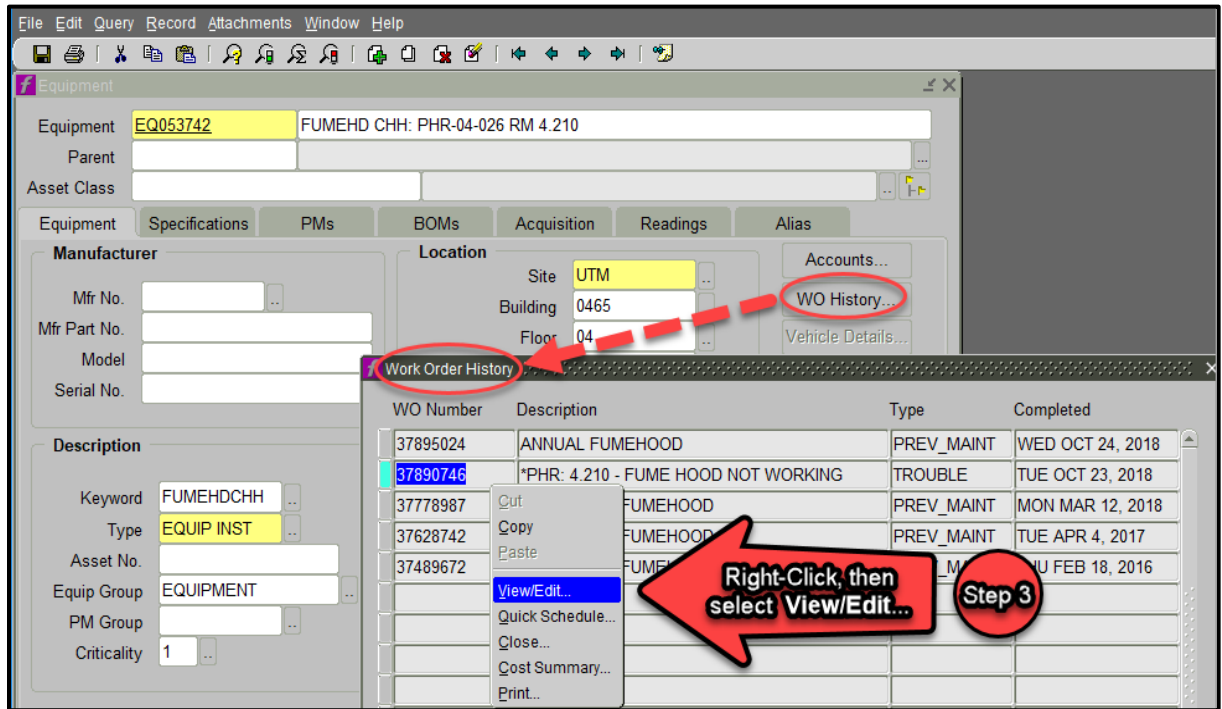
1. Click the WO History button to enter a new Note



2. Select the appropriate Work Order of choice by double clicking the Work Order



3. Right click the work order, then select View/Edit to review the work order. Close all windows when finished.



4. Work Orders

A. Main TAB

Review EQ# relationship – All PM work orders should have an Equipment number referenced when maintenance work is performed.

The screenshot shows the 'Main' tab of a Work Order in the FAMIS system. The 'Equipment' field is highlighted with a red arrow and the text 'Review EQ#'. The 'Equipment' field contains the value 'EQ001366' and a description 'FLTR BANK 008 FOR AHU-1'. Other visible fields include 'WO Number' (37768155), 'Parent WO' (37768151), 'Asset Class', 'Type' (PREV_MAINT), 'Priority' (3), 'Method' (IN HOUSE), 'Assigned To' (01235), 'Status' (CLOSED), 'Start Date' (MON JAN 29, 2018), 'Due Date' (FRI FEB 2, 2018), 'Completed' (TUE JAN 30, 2018), 'Crew' (091), 'Craft' (MAINT_WRKR), 'Crew Size' (1), 'Est Hrs' (.25), 'Site' (UTM), 'Building' (0089), 'Floor' (001), 'Room' (1), and 'Zone' (1). The interface also includes buttons for 'Print', 'Library', 'Request', 'Related WO', 'Create WO', 'Billing', 'Estimates', 'Dates', 'Audit...', and 'Conv to Proj...'. A status bar at the bottom indicates 'Record: 1/1'.

B. Tasks TAB

The Tasks TAB provide details of work to be performed for PM work orders or details of the reported problem on TROUBLE related work orders. Close all windows when finished.

The screenshot shows the 'Tasks' tab of the same Work Order. A red arrow points to the 'Tasks' tab. The main area displays a list of 14 numbered tasks for filter bank maintenance:

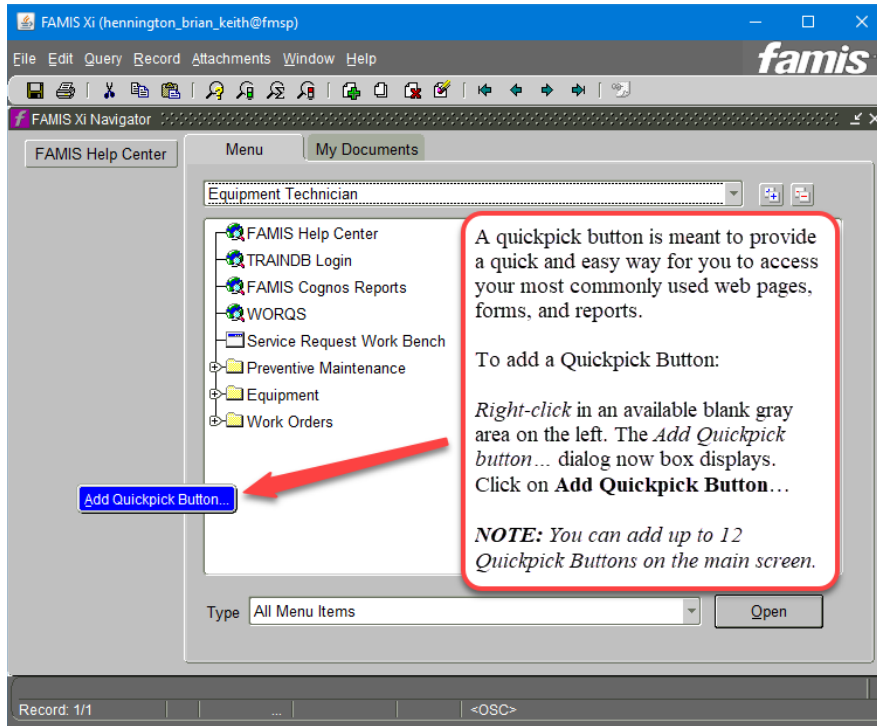
- 1 AS APPLICABLE, NOTIFY CLIENT AND / OR SHOP ADMIN ASSISTANT THAT THE UNIT IS GOING OUT OF SERVICE.
- 2 NOTIFY FCMS GROUP, OPERATIONS, AND ZONE MAINTENANCE JUST PRIOR TO UNIT SHUT DOWN.
- 3 BEFORE SERVICE, WITH EQUIPMENT RUNNING, RECORD STATIC PRESSURE DROP ACROSS ALL FILTERS.
- 4 VISUALLY CHECK CONDITION OF FILTERS WITH FLASHLIGHT.
- 5 CHECK FILTERS, PLENUMS AND DUCTS FOR EVIDENCE OF MOLD OR MILDEW.
- 6 COMPARE VISUAL INSPECTION WITH MANOMETER READING.
- 7 REPLACE FILTERS AS REQUIRED
- 8 AS APPLICABLE, START UP UNIT AND CHECK FOR PROPER OPERATION.
- 9 AFTER SERVICE, MEASURE AND RECORD STATIC PRESSURE DROP ACROSS ALL FILTER SECTIONS.
- 10 AS APPLICABLE, NOTIFY CLIENT AND / OR SHOP ADMINISTRATIVE ASSISTANT THAT THE UNIT IS OPERATIONAL.
- 11 CLEAN THE AREA AND PROPERLY DISPOSE OF ALL TRASH MATERIALS.
- 12 RECORD ALL REQUIRED UNIT SPECIFICATIONS.
- 13 DESCRIBE ANY ABNORMAL UNIT OPERATING CONDITIONS.
- 14 RECORD DEFECTS OF ANY UNIT COMPONENT, PART OR ASSEMBLY REQUIRING REPAIR.

The status bar at the bottom indicates 'Record: 1/1'.

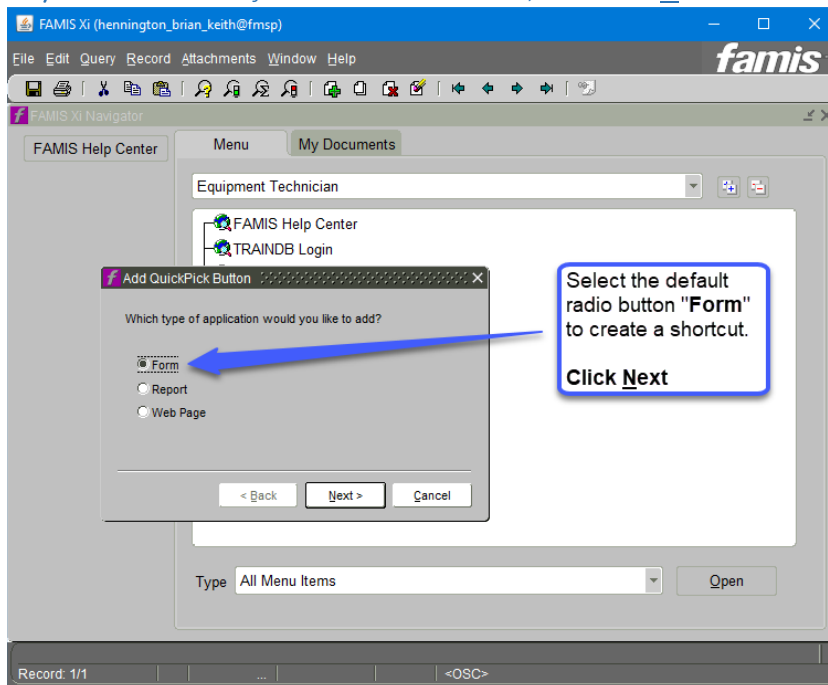
5. Appendix

Quickpick Buttons are great shortcuts to access your frequently used FAMIS forms. Follow these four simple steps to create a custom Quickpick Button.

Step 1 – Right-click in the gray area on the left, and then click on Add Quickpick Button...



Step 2 – Select the default radio button Form, then click Next.



Step 3 – Select desired Application, type desired name for Button Label, then click Finish.

In the **Application** drop-down list, select the type of shortcut you want to link to the main page.

In the **Button Label** field, type a name for the **Quickpick Button** you created.

NOTE: This is the name you will see on the **Quickpick** button, so create a 'meaningful' name or use the appropriate naming convention for your crew.

Click **Finish**.

Step 4 – The new "Active Work Orders" quickpick button now displays.

Your new "Equipment" Quickpick button now displays.

6. Questions

1. For any equipment related questions, please contact Engineering Tech Support Contact (ETS):

Mysti Burgess, Program Coordinator, FS

512-471-3739

mysti.burgess@austin.utexas.edu

- If equipment needs an EQ ID, then it should be reported to ETS fmeu@austin.utexas.edu or hand delivered to ETS using the “[Add/Edit/Retire \(White Sheet\)](#)”.
 - To determine which pieces of equipment need an EQ ID, please review the [EQ-ID-List.pdf](#) document located on the [Facilities Services](#) website.
2. For general questions, please contact Facilities Services Business Analytics:
FS-Business-Analytics@austin.utexas.edu