Division/Dept: FOM	
Applies To: Zone Maintenance	
Author: Darnell Mack	
Title: Add Work Order to CP	

The University of Texas at Austin
Facilities Services

PURPOSE

To capture the entire story of labor, material, multiple events and responses by connecting all related work orders and project related work.

PROCEDURES

1. Open up FAMIS.

2. Query the existing work order to track the entire history from service request to project completion. (This tells the whole story)

   - We need this to be the original work order, demonstrating the story over time with multiple call.

3. Get the work order used by the crew to do work:

   a. If yes EQ number: document the EQ as soon as you figure out it was a piece of equipment. If a water heater or a VAV, put the EQ number on the work order. Or a pipe that is connected to a system, document the EQ number listed on the system.

   b. If no EQ number: just go on, the process is exactly the same. Just work from the original trouble ticket. It is important to properly document the story.

      i. If there is a trouble call, there is first response to contain the issue. We know we track the priority 1's to closure very quickly. Once this becomes much larger) (like calling in Blackmon Mooring, or engineering support, etc.

      ii. Then create a child work order (1) by clicking the "Create WO" button and (2) change to MAINT type. Closing the trouble ticket after initial response is complete.
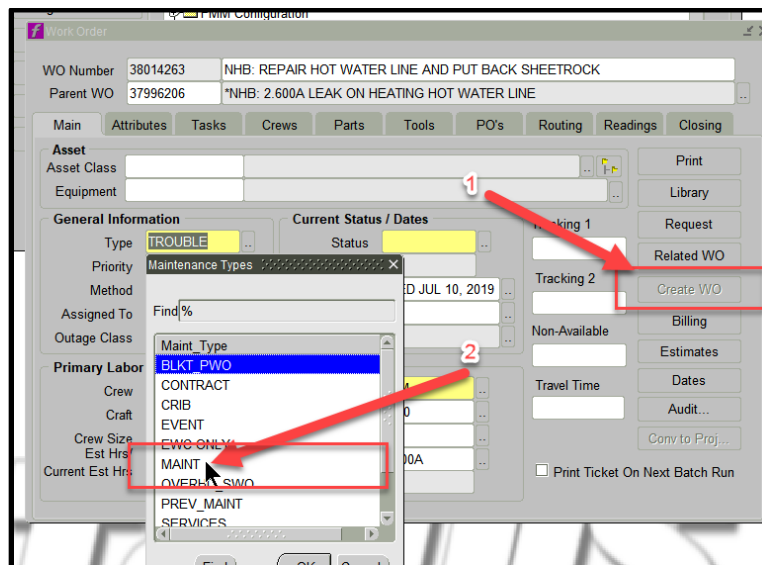
iii. In this way, we are able to keep up with the story of what has occurred – start to finish. By doing this work order directly the in CP, we lose the relationship (and time, money, contractor work, labor by multiple shops, etc.) We need this justification to increase the budget for repairs.

c. Now, you treat this as any other work order, write your notes about who did what, and charge time, what details were discovered about the issues.

d. Once determined that this is a serious issue and needs to be turned into a CP.   (Exceeds $5000 total material and labor)

   i. If you know the CP number, then you can fill this out. Get the account number from whoever is giving you the CP number. Either Zach or one of the ETS engineers, like Dave Cooper or whoever. Just depends on who has the CP. You can always call Mysti for some direction.

   ii. If you do not have the CP, then find it.

      ➢ Call Zach or Darnell to help make that determination. Most likely Zach will tell you to turn it over to a CP, he will determine if it issued from his Emergency CP

      ➢ Or, the engineers will get an emergency CP thru the R&R process.

   iii. Make note of this CP and account number.
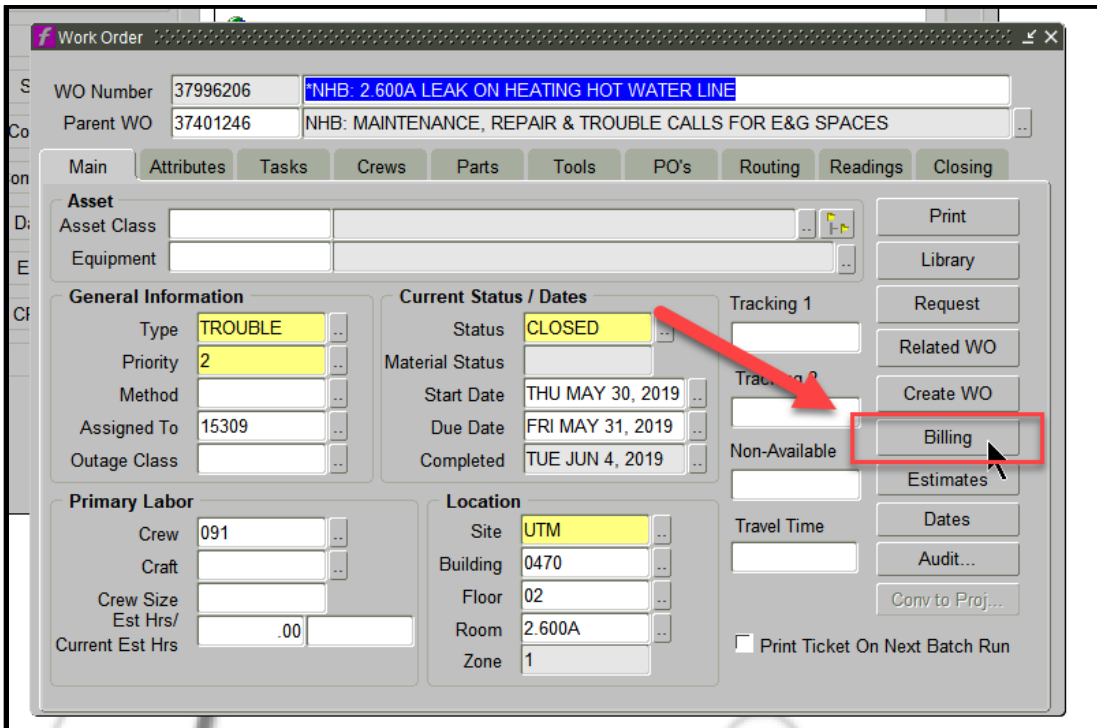
e. In FAMIS at the work order, click on REQUEST.
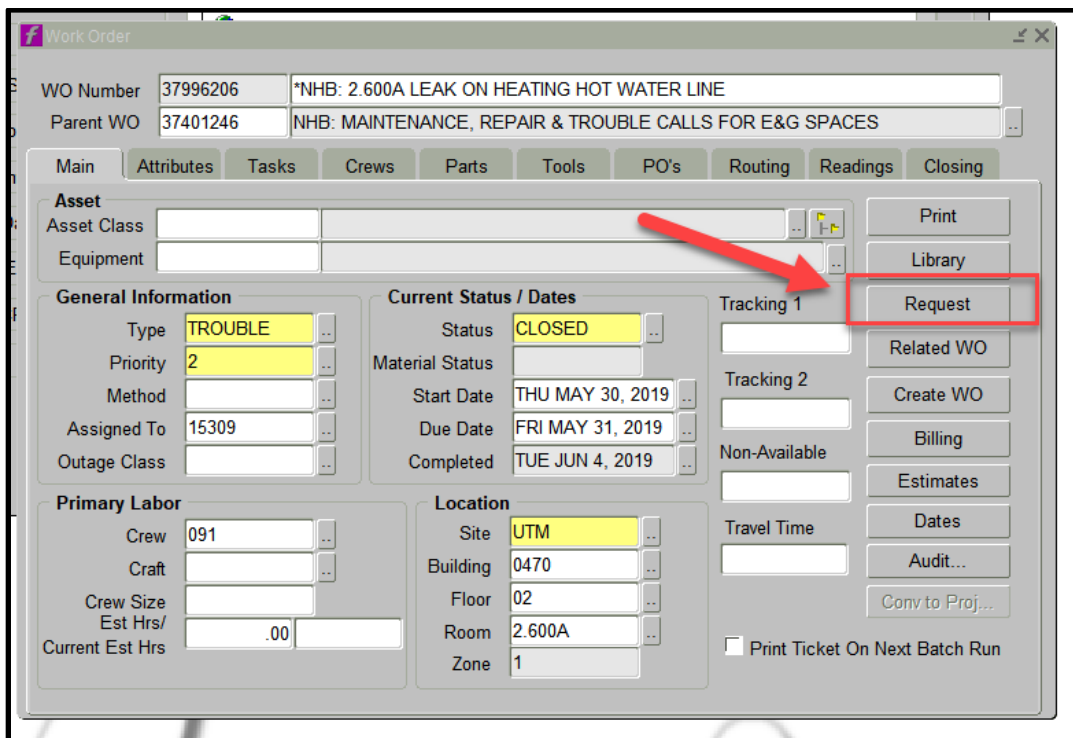
f. Enter CP and tab to next field

g. In the yellow fields that shows up in the BUDGET CODE.   This is a required field.

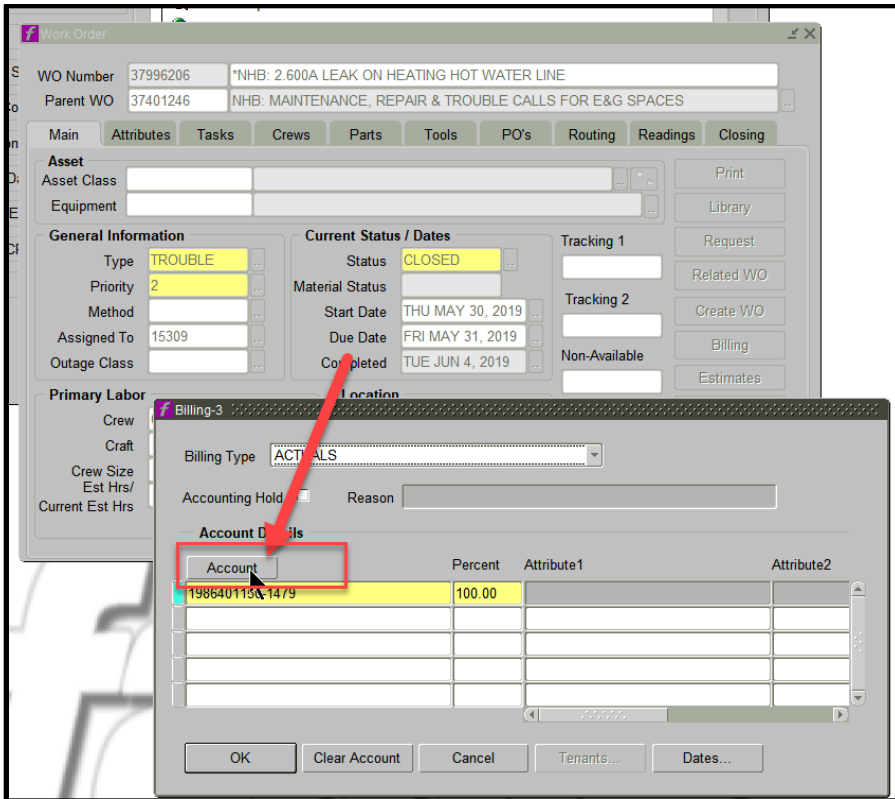h. Click on snake eyes and scroll down the list and find 2.3
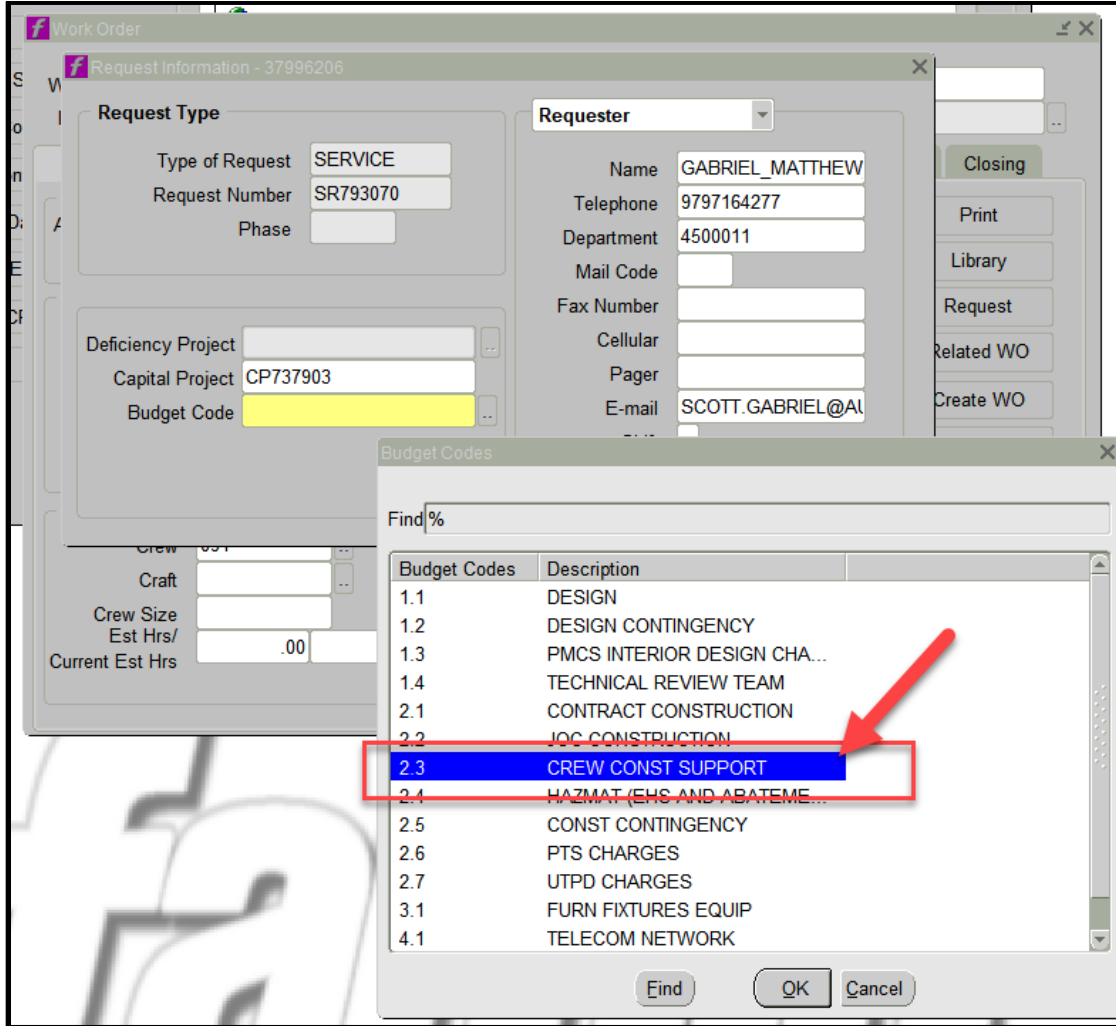
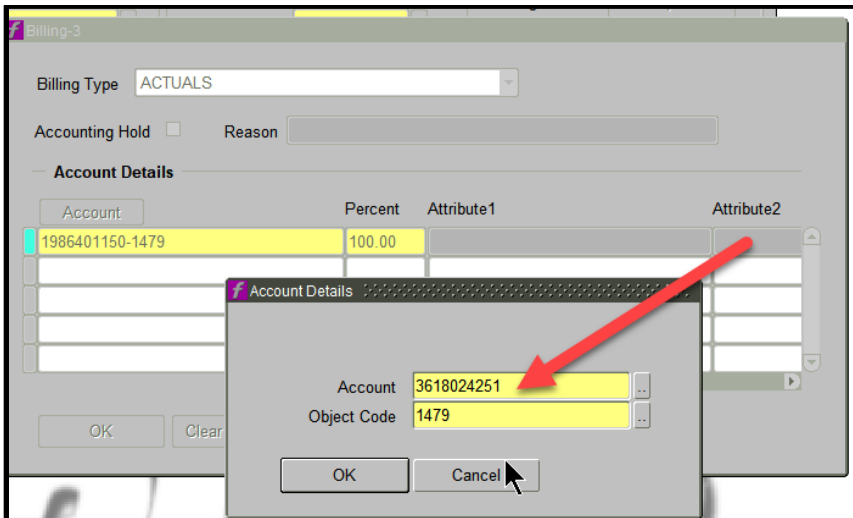i. Click ok. It goes back to the work order screen. Close out of this screen by clicking the X.
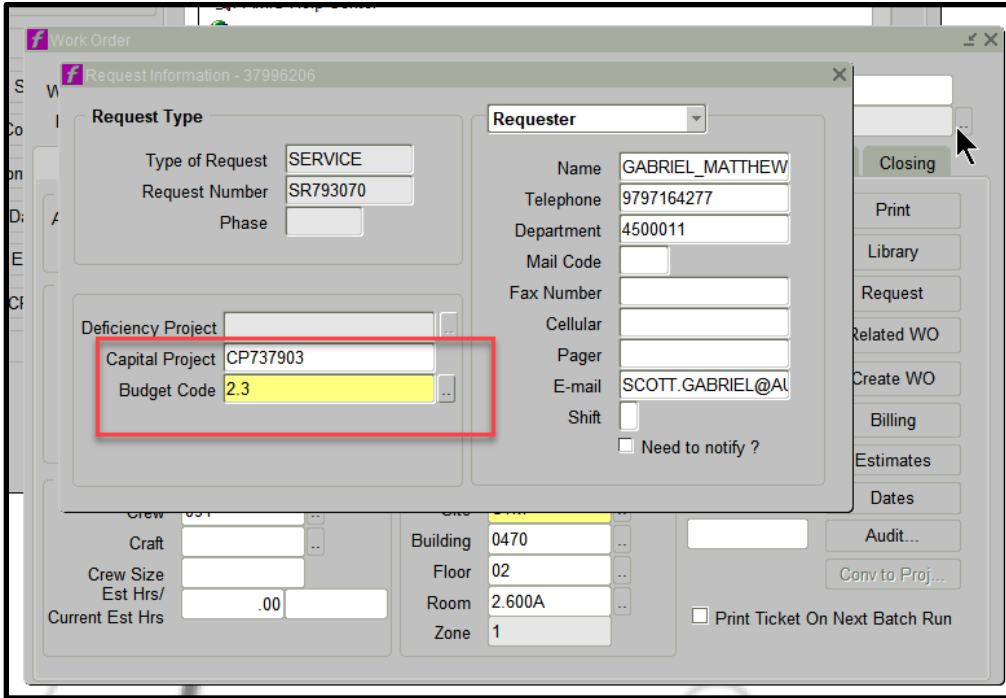
j. Click on Billing

k. Click on Account

l. Click on ACOUNT and type in the account number that you were provided. The Object code will remain the same. 1479 is always maintenance.

m. Click ok twice to get back to the work order screen.

n. Click on SAVE/COMMIT.

This completes the process of adding a work order to a CP.

ADDITIONAL INFORMATION

Supporting Documentation	

DOCUMENT HISTORY

Title	Revision Date	Document Owner(s)	Summary of Changes	Status
Add Work Order to CP	07/15/2019	Darnell Mack, Brian Hennington	Original	Published 7/15/2019