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Equipment_Notes_Instructions	02/13/2020	
Facilities Services-Business Analytics		

Equipment_Notes_Instruction Training

Reference Guide

Table of Contents

1. Objective

This document is designed to guide users through equipment notes into FAMIS. This training is not comprehensive, but focused on the basic equipment note entry 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
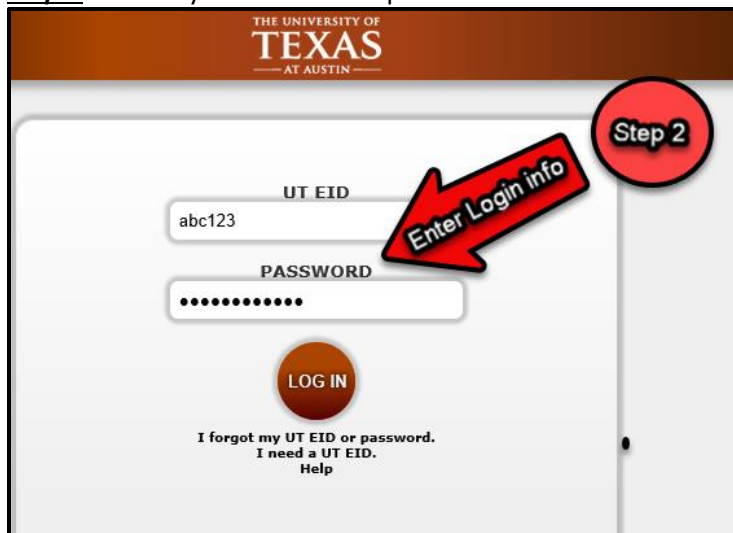- Distinguish between Equipment notes and Work Order notes

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:

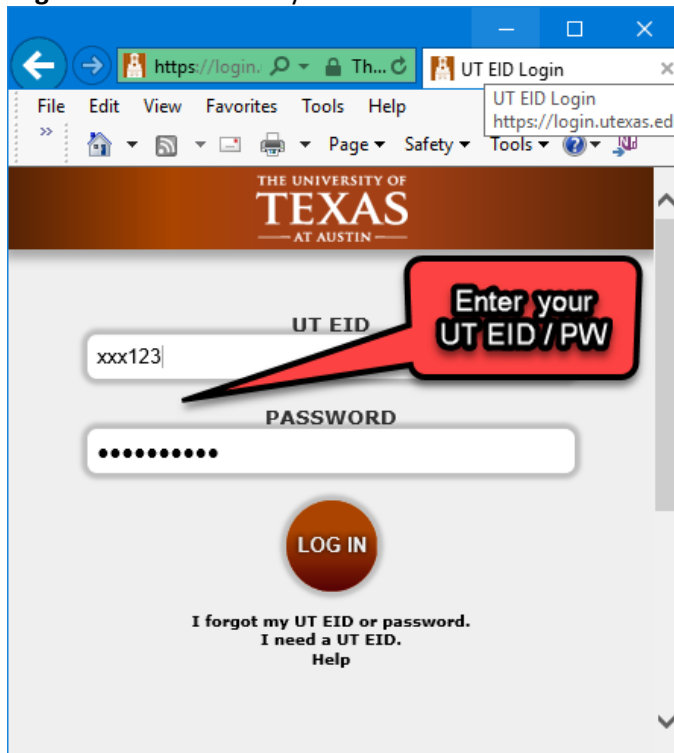2) ***Step 2*** – Enter your UT EID and password:

3) *__Step 2__* -Single-Click the **FAMIS** icon

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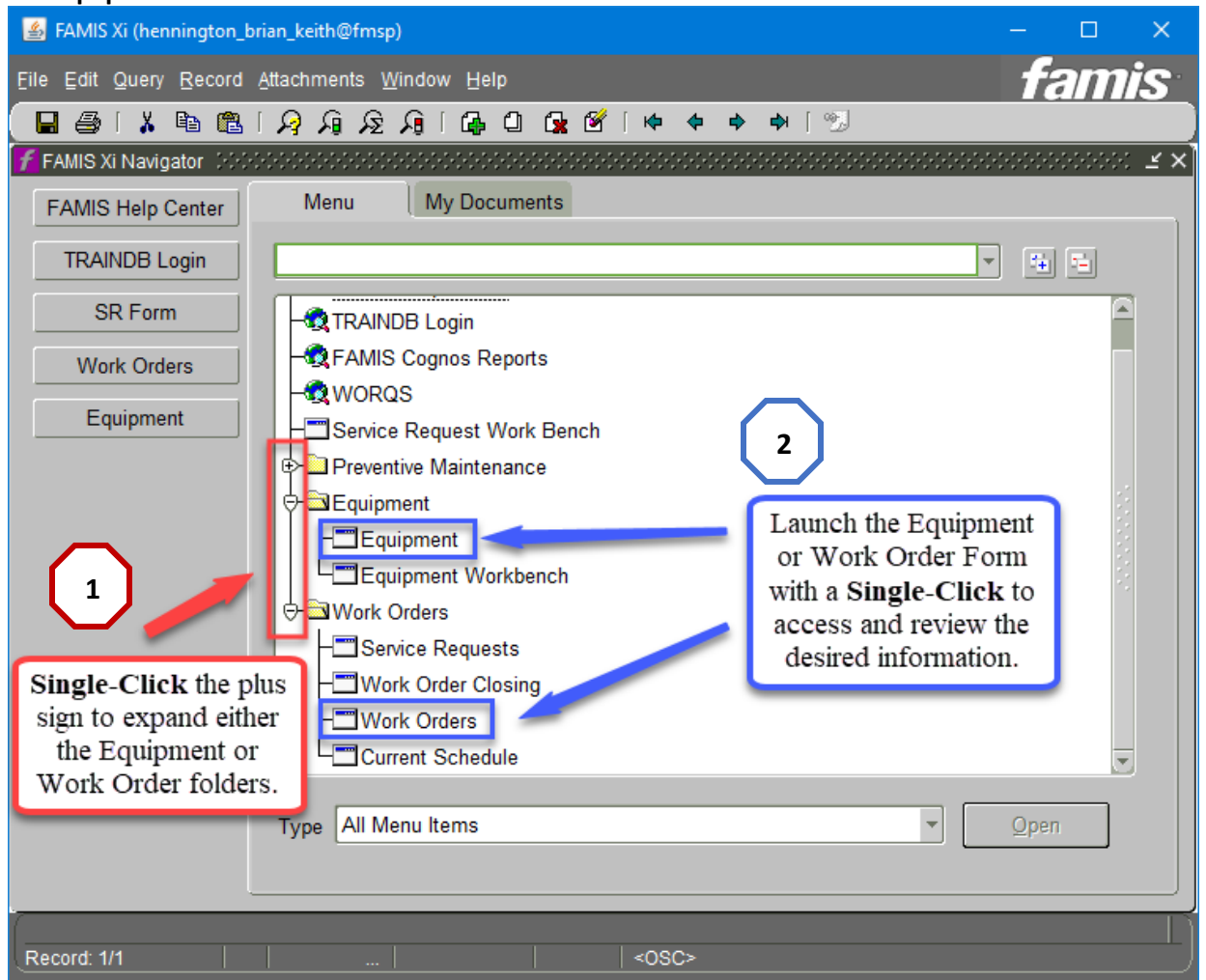https://wikis.utexas.edu/display/WORQS/FAMIS

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

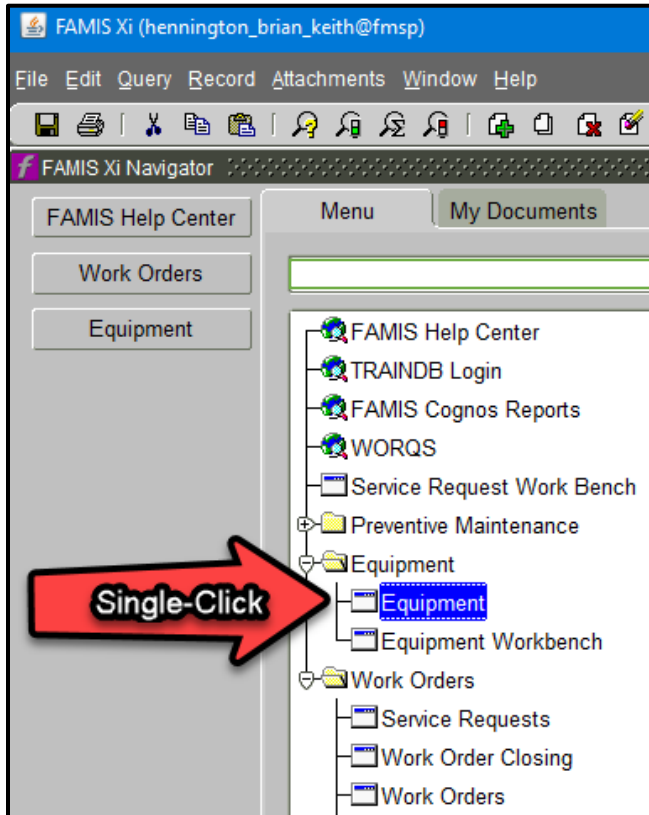C. **Main Screen Example** - this is the default home screen after log in.
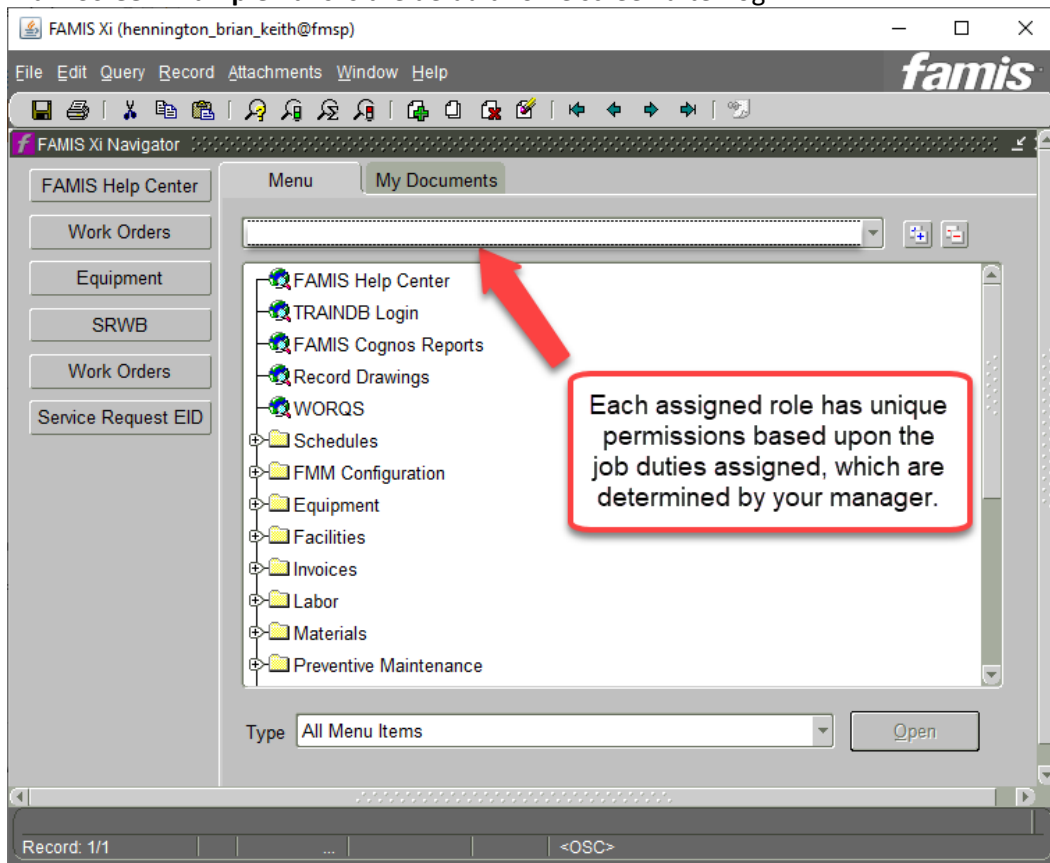
D. **Equipment and Work Order Forms in FAMIS** - are used to review the desired information.
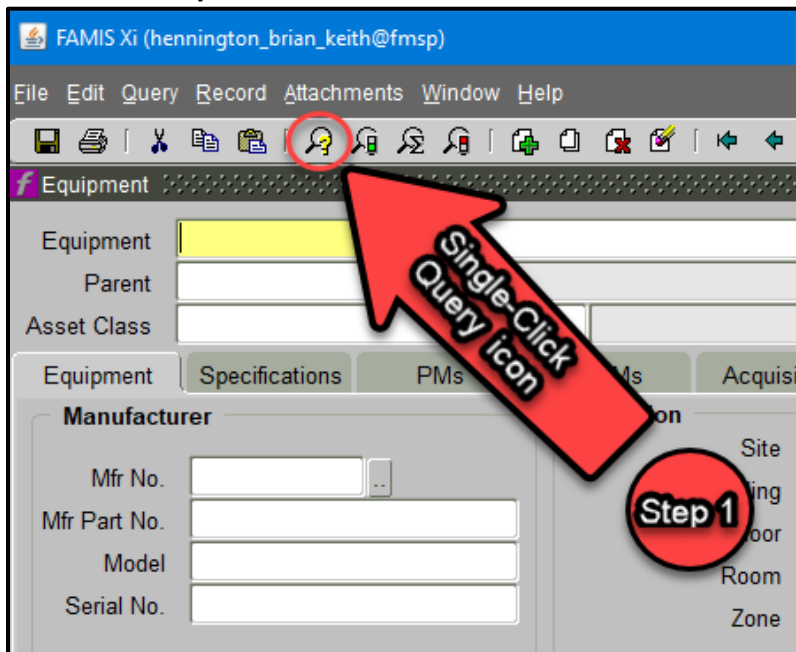
3. Equipment Form

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.

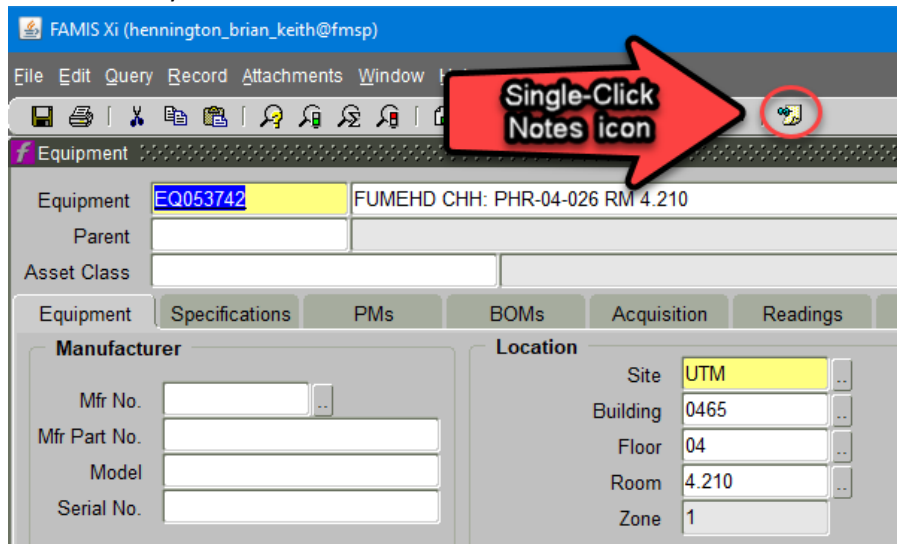1. 🔍 - Enter the **EQ053742**, then click **Execute Query** to return data results.

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.
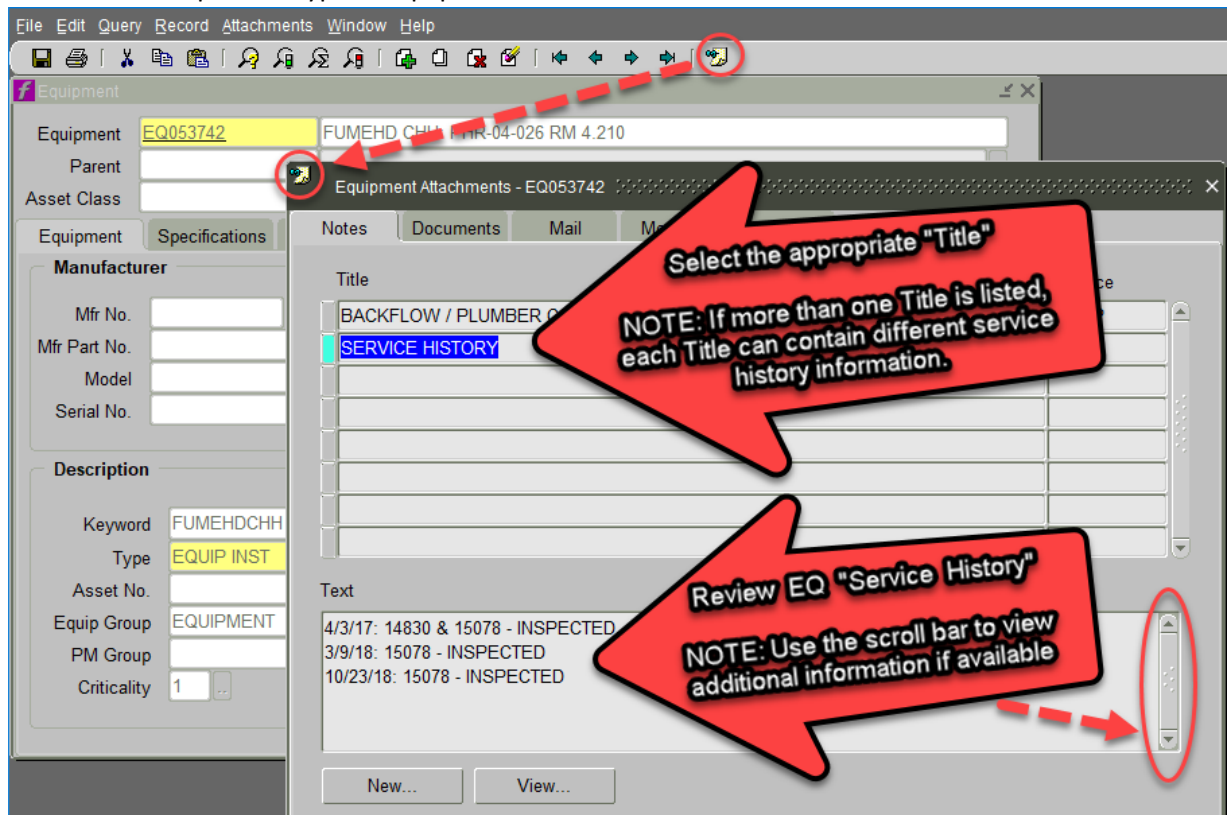
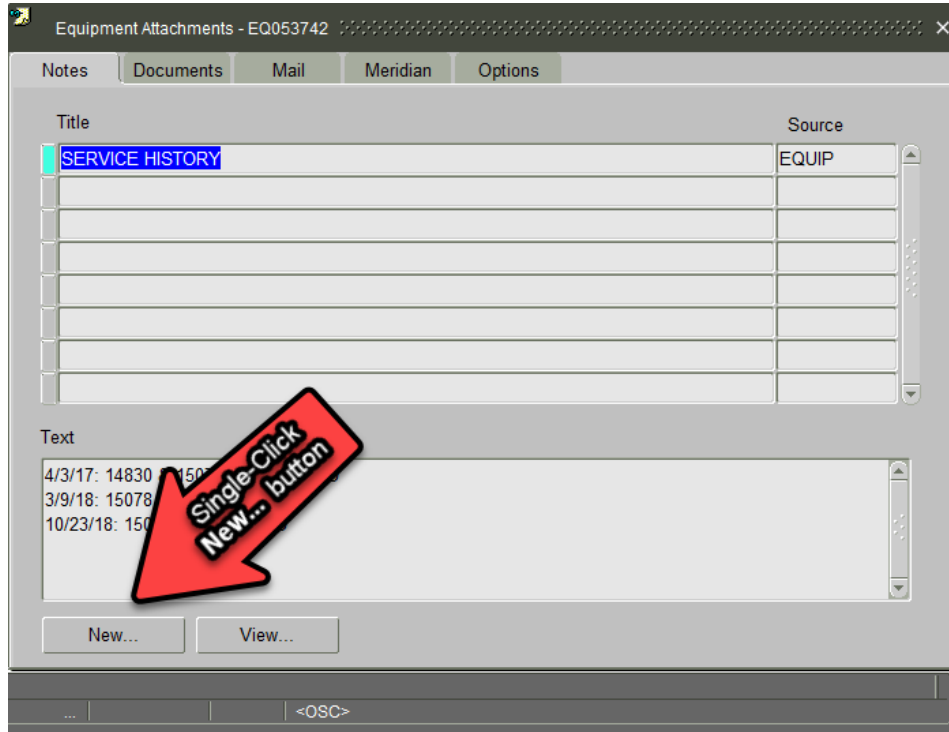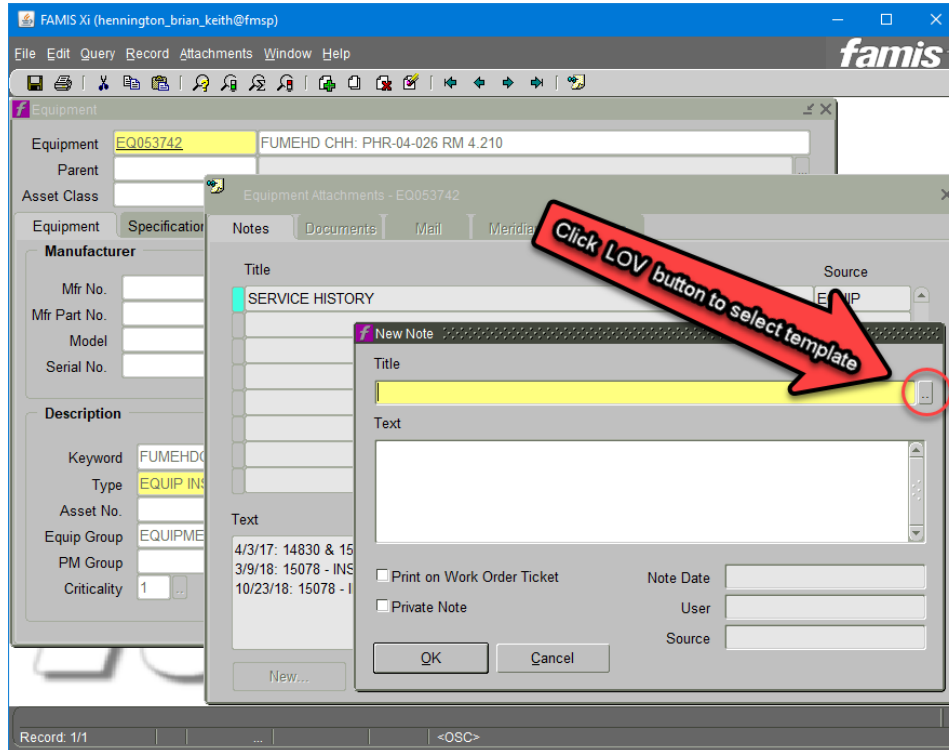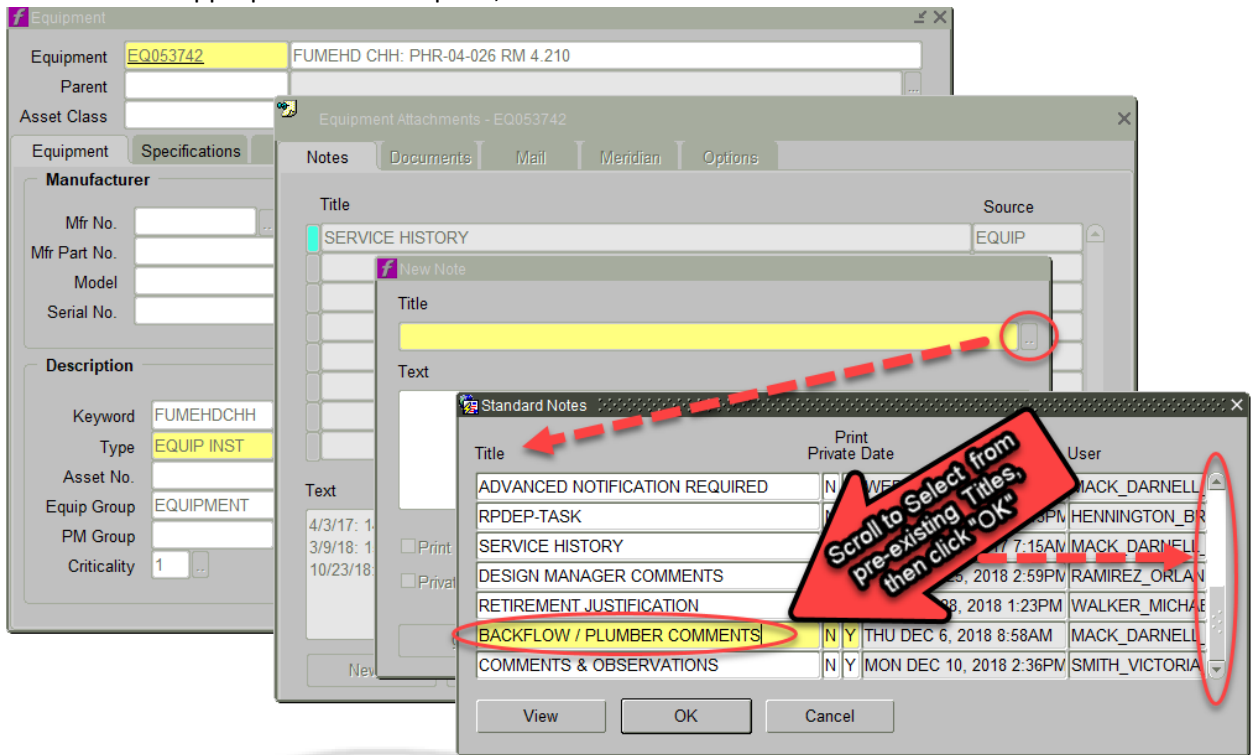## E. Enter New Service History Notes for EQ# Record
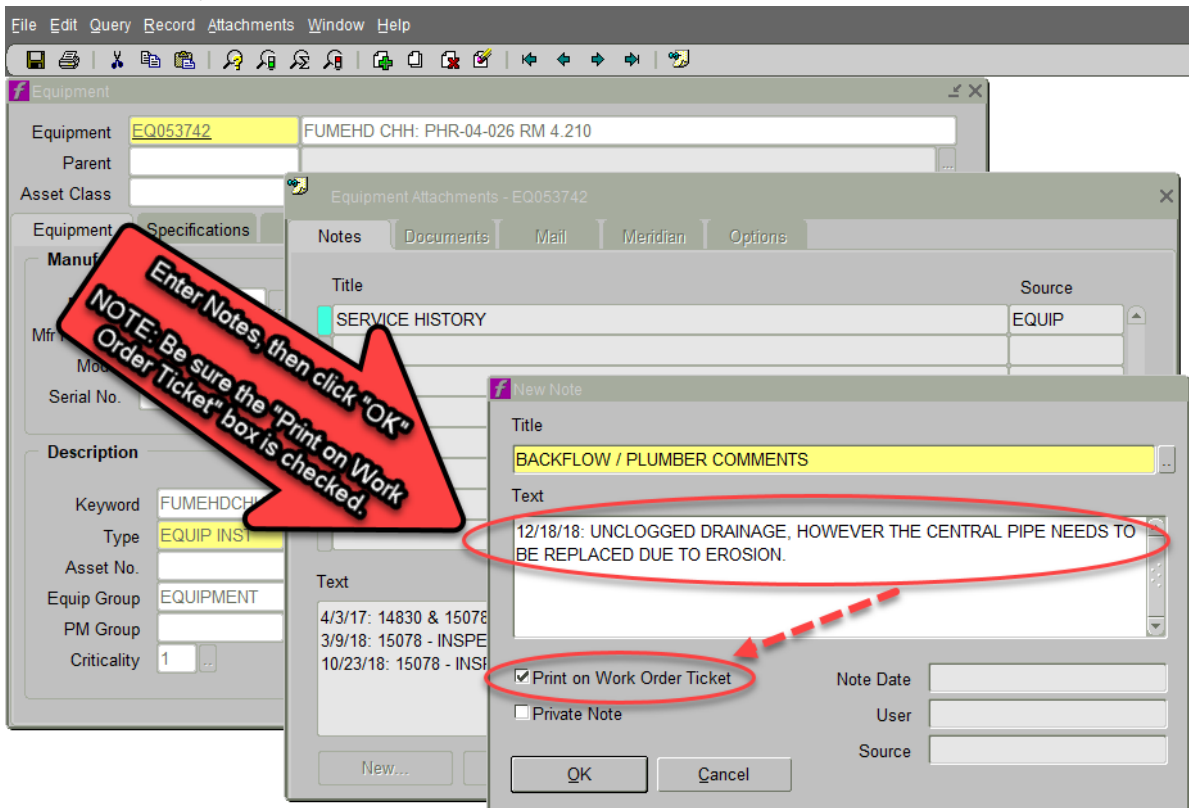
1. Click the **New…** button to enter a new Note

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.

F. Launch EQ# Work Order History

    1. Click the WO History button to enter a new Note
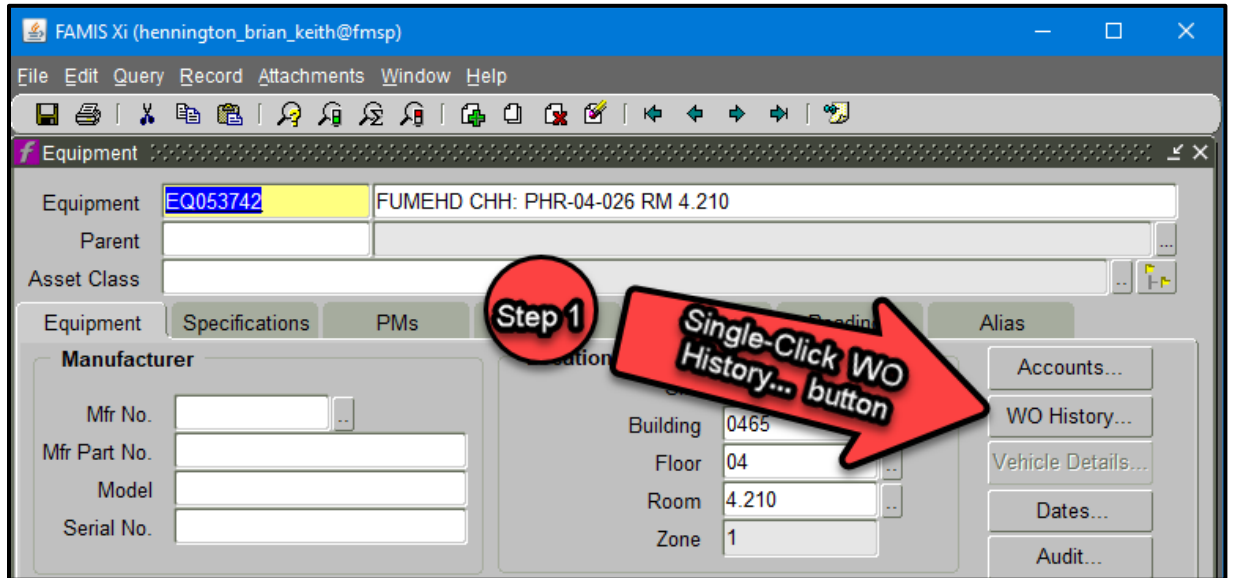
    2. Select the appropriate Work Order of choice by double clicking the Work Order
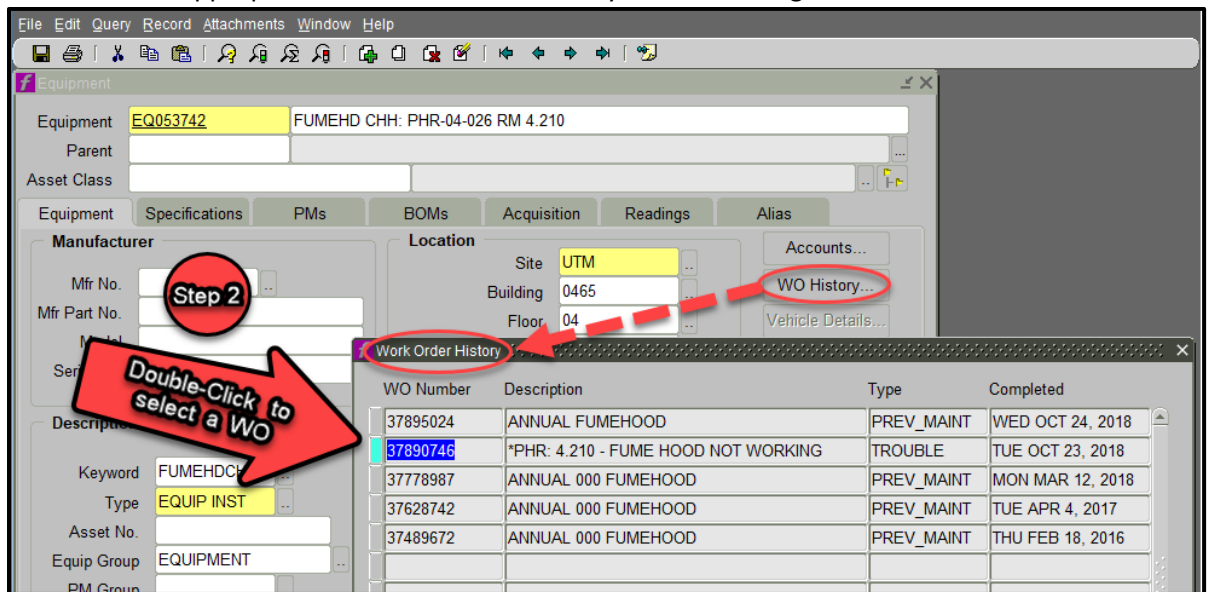
3. Right click the work order, then select View/Edit to review the work order. Close all windows when finished.

4. Work Orders

A. Main TAB

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

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.
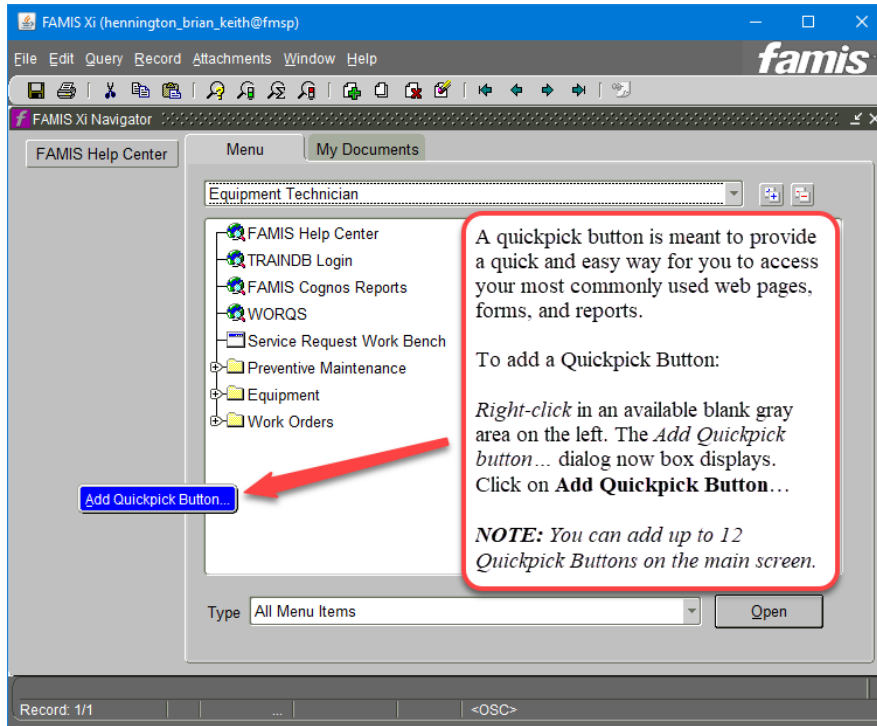
5. Appendix

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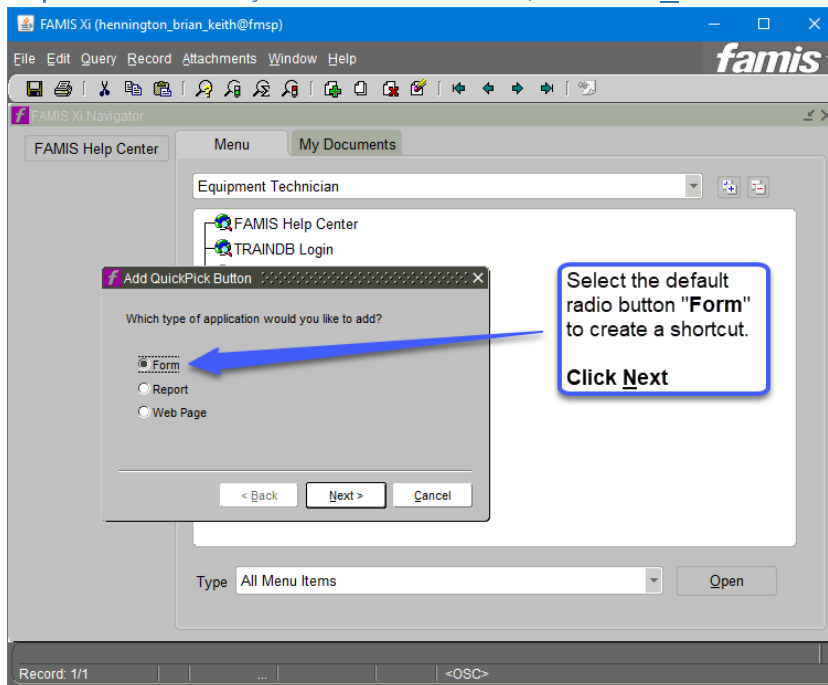
*Step 3 – Select desired **Application**, type desired name for **Button Label**, then click **Finish**.*

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

6. Questions

1. For questions, please contact:

   Patti Soskins, Manager, Facilities Services Business Analytics
   512-471-0927
   FS-Business-Analytics@austin.utexas.edu

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

   Mysti Burgess, Program Coordinator, Facilities Services
   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.