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Facilities Services-Business Analytics		
 Facilities Services		
Equipment_Notes_Instruction Training		
Reference Guide		

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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

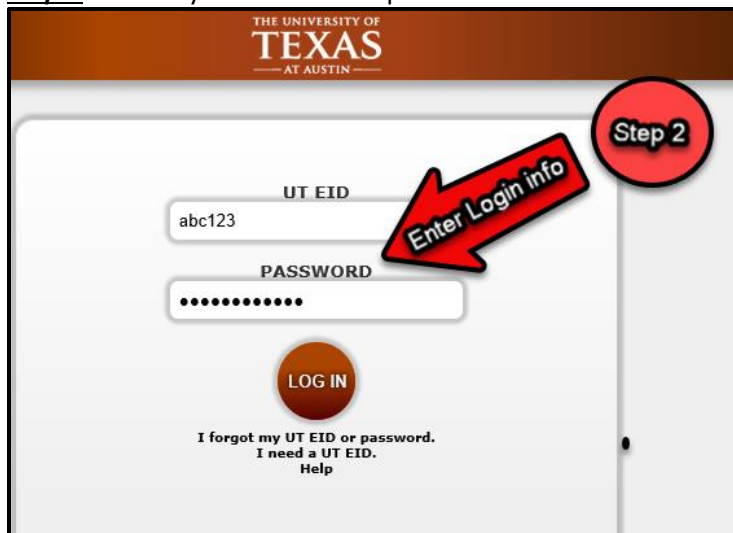
2. FAMIS Navigation Overview

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:



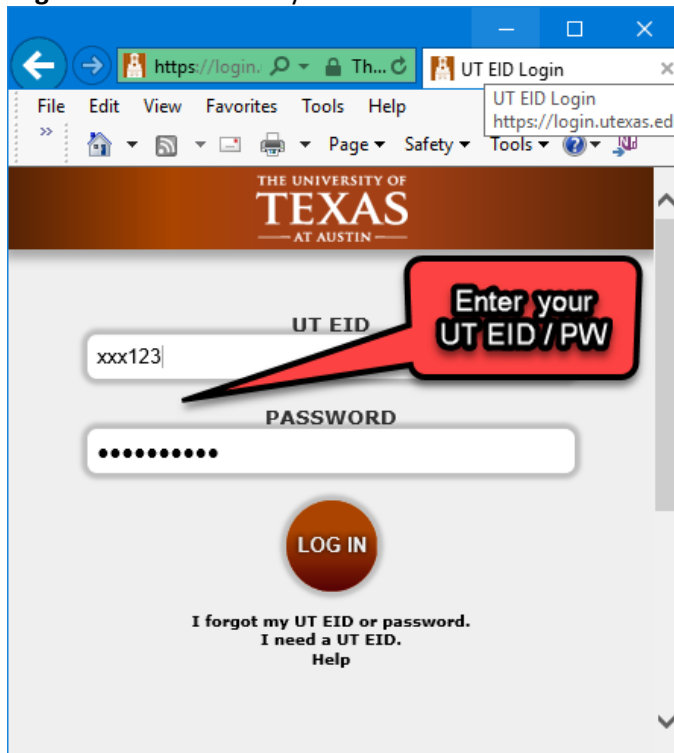
3) **Step 2** -Single-Click the **FAMIS** icon

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 includes 'View', 'Edit', 'Revisions', 'Clone content', and 'Layout Editor'. The main content area features a large blue banner for 'TIMESHEET DEADLINES' with an illustration of a hand holding a calendar and a clock. A red circle with 'Step 3' and a red arrow labeled 'Single-Click FAMIS icon' points 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 note that the website was built with employees in mind.

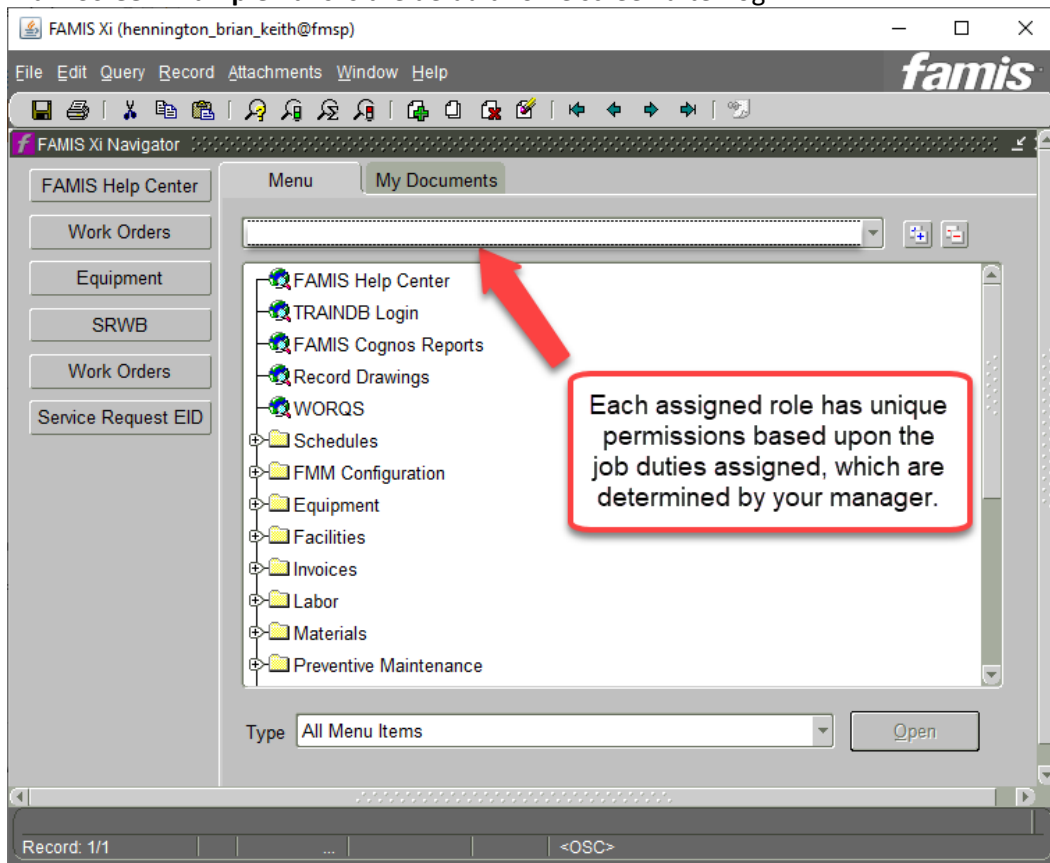
- 4) **Step 3** - Now Single-Click the **FAMIS** icon, upon landing on the WORQS wiki site:
<https://wikis.utexas.edu/display/WORQS/FAMIS>

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. The main content area features the 'WORQS' logo, a description of the system, contact information for the Facilities Service Center, and sections for 'About WORQS', 'New Improved Features starting 7/10/2017', and 'Helpful tips'. On the right side, there are sections for 'Application Support' and 'Quick Links'. A red circle with the text 'Step 3' is placed over the 'FAMIS' link in the 'Quick Links' section. A red arrow points from this circle to the 'FAMIS' link, with the text 'Single-Click FAMIS link' written along the arrow.

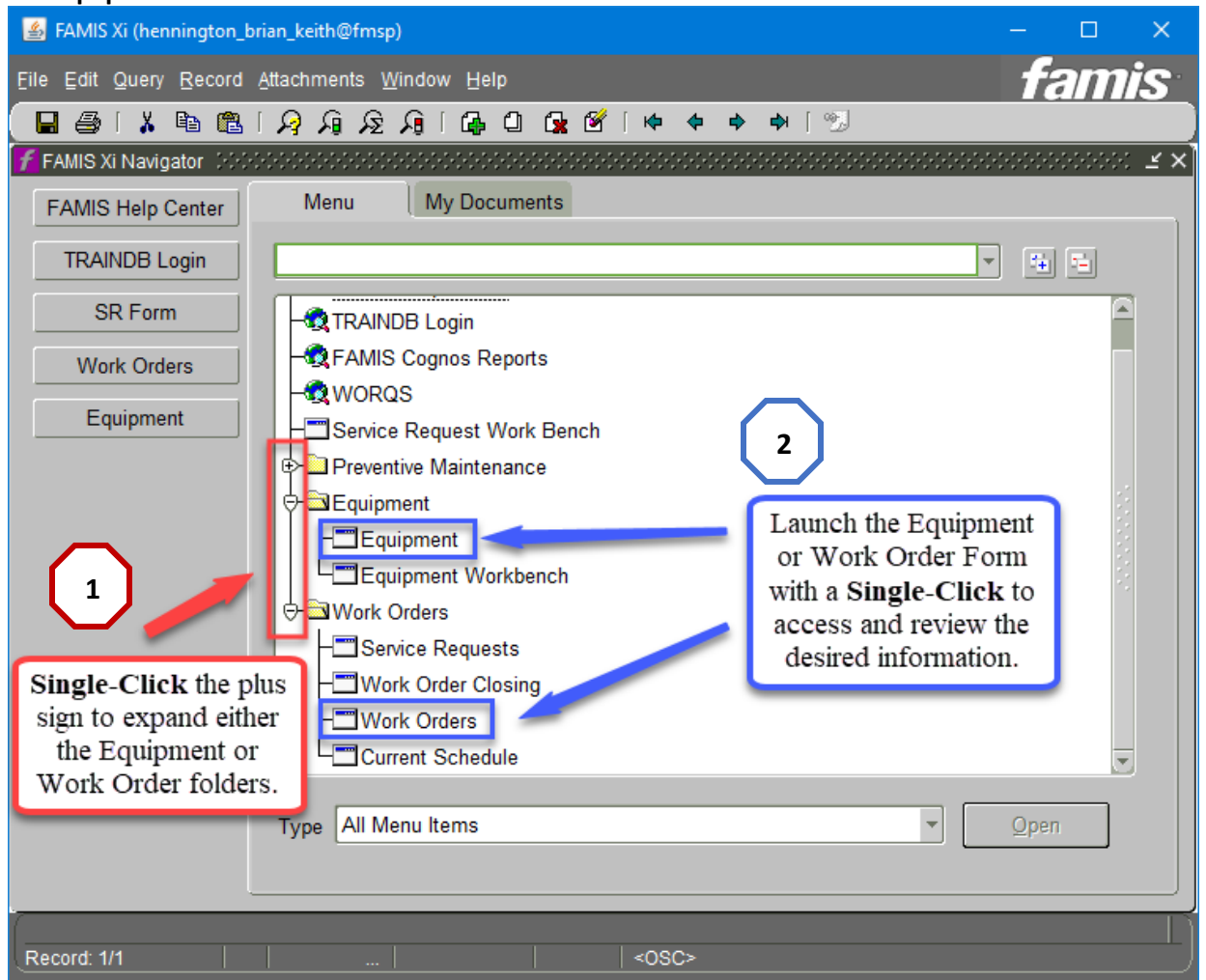
B. Log into FAMIS – Enter your UT EID and Password



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

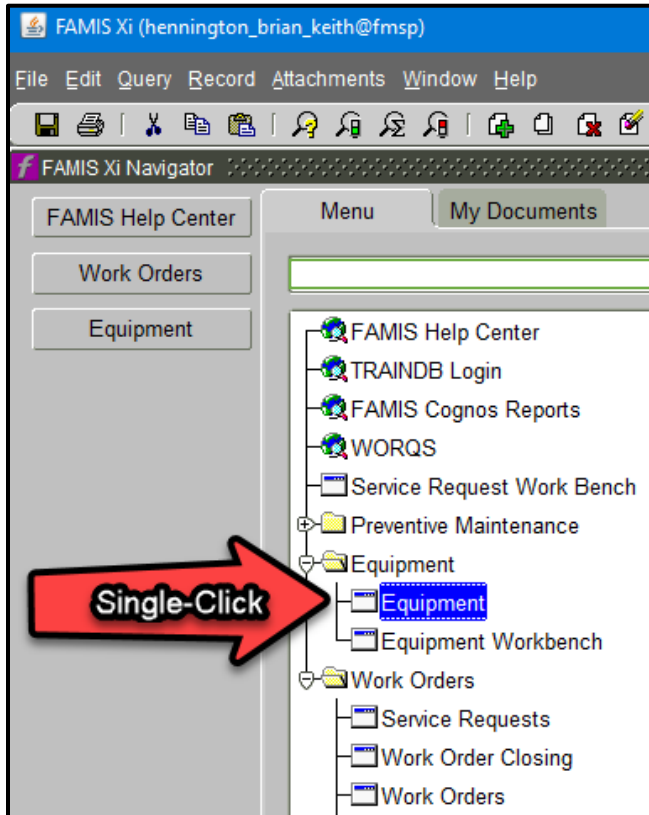


D. **Equipment and Work Order Forms in FAMIS** - are used to review the desired information.




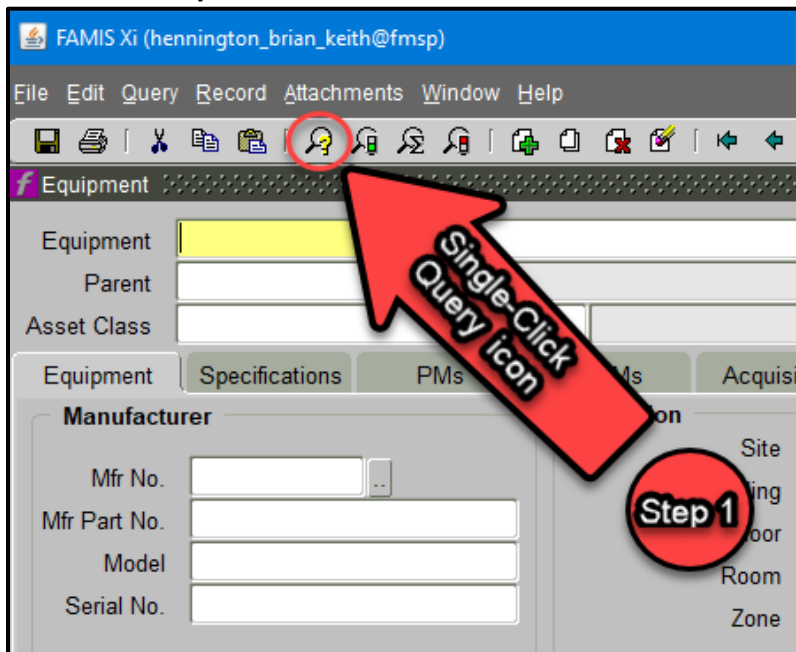
3. Equipment Form

A. Launch the Equipment Form



B. Enter Query Mode

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




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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.

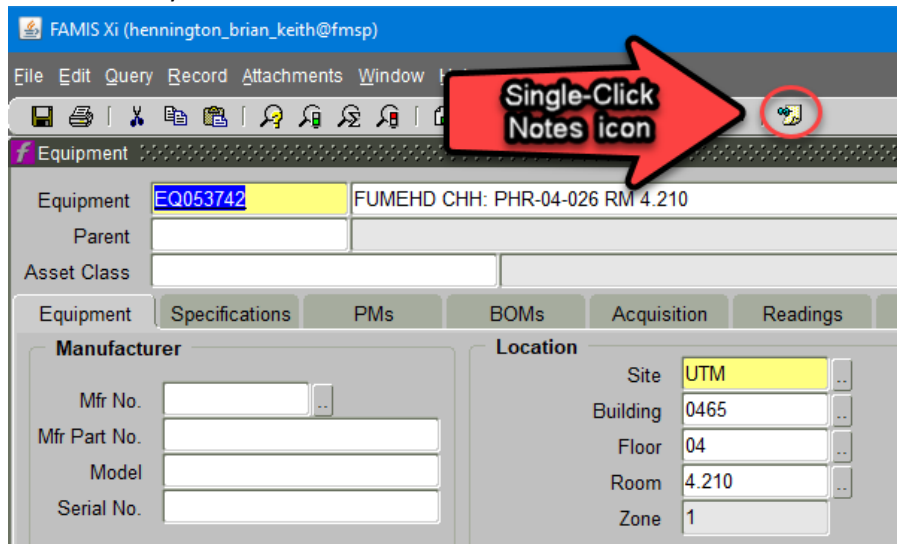
The screenshot shows the FAMIS Xi interface with the 'Equipment' query entry screen. The 'Equipment' field contains the query 'EQ053742'. The 'Execute Query' button is highlighted with a red circle and labeled 'Step 3'. The 'Equipment' field is highlighted with a red circle and labeled 'Step 2'. The interface includes a menu bar (File, Edit, Query, Record, Attachments, Window) and a toolbar with various icons. The main area is divided into several sections: 'Manufacturer' (Mfr No., Mfr Part No., Model, Serial No.), 'Location' (Site, Building, Floor, Room, Zone), 'Description' (Keyword, Type, Asset No., Equip Group, PM Group, Criticality), and 'General Information' (Assessment Date, Service Guide, Status / Condition, Rental Type, Rental / Mileage Rate, Replacement Cost, Overall Rating). The status bar at the bottom indicates 'Record: 1/1' and 'Enter-Qu...'. A prompt at the bottom reads 'Enter a query, press Ctrl+F11 to execute, F4 to cancel.'

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

The screenshot shows the FAMIS Xi interface with the data results for the 'EQ053742' query. The 'Equipment' field contains 'EQ053742' and the 'FUMEHD CHH: PHR-04-026 RM 4.210'. The 'Location' field shows 'UTM', '0465', '04', '4.210', and '1'. The 'Description' field shows 'FUMEHDCHH', 'EQUIP INST', 'EQUIPMENT', and '1'. The 'General Information' field shows 'ON-LINE'. The interface includes a menu bar (File, Edit, Query, Record, Attachments, Window, Help) and a toolbar with various icons. The main area is divided into several sections: 'Manufacturer' (Mfr No., Mfr Part No., Model, Serial No.), 'Location' (Site, Building, Floor, Room, Zone), 'Description' (Keyword, Type, Asset No., Equip Group, PM Group, Criticality), and 'General Information' (Assessment Date, Service Guide, Status / Condition, Rental Type, Rental / Mileage Rate, Replacement Cost, Overall Rating). The status bar at the bottom indicates 'Record: 1/1' and '<OSC>'. A prompt at the bottom reads 'Enter a unique number to identify this equipment.'

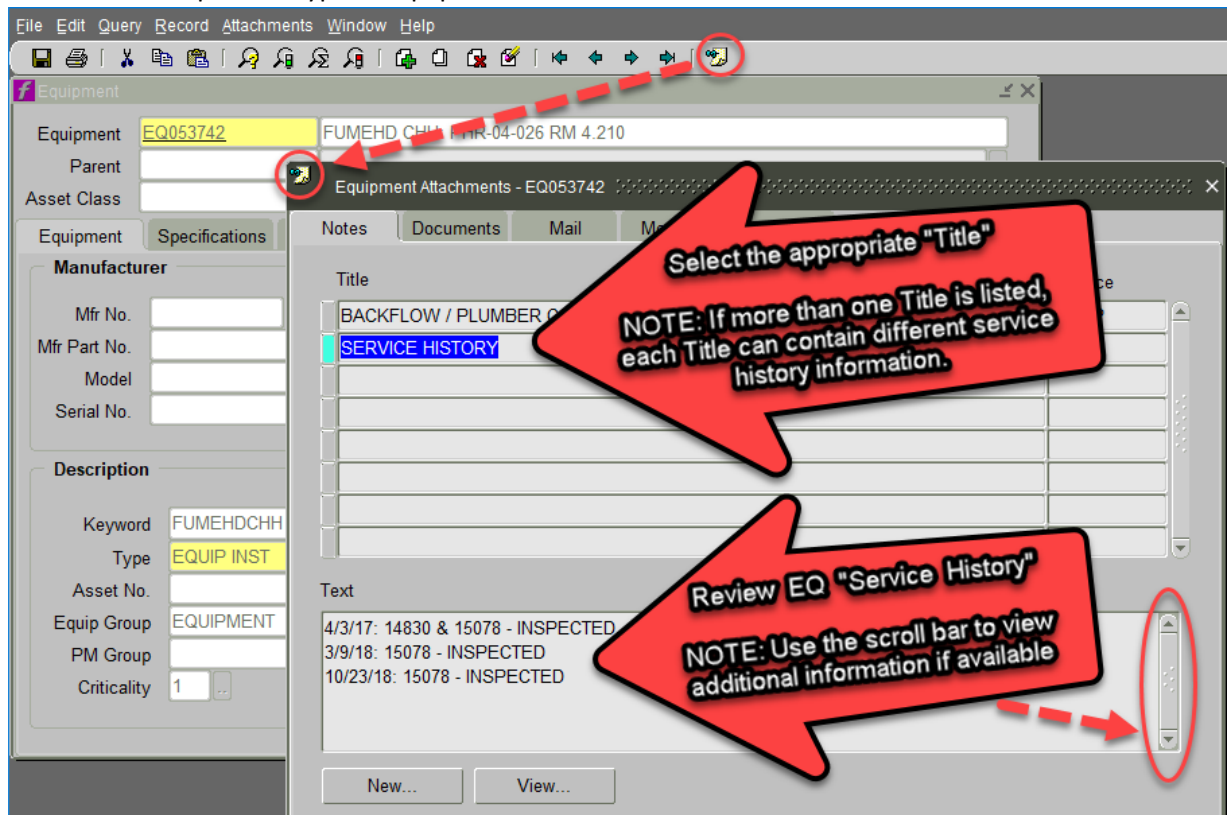
D. Launch EQ# Notes and Review Service History

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

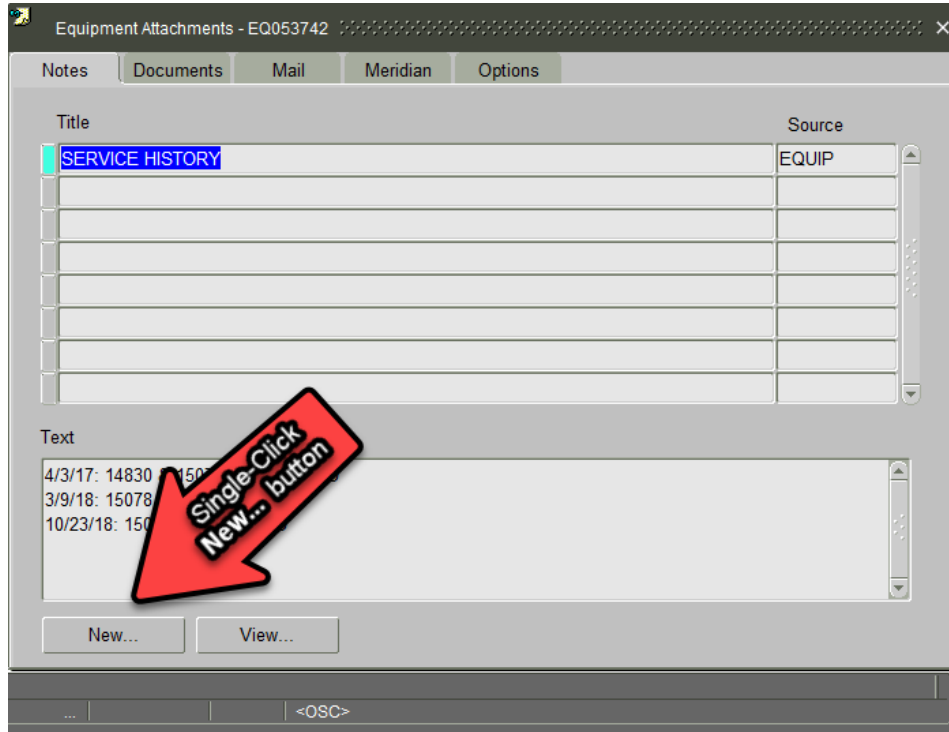


2. The **Equipment Attachments Form** displays the service history records of the EQ#. Within the Text comment box, the "Service History" notes are displayed for review.

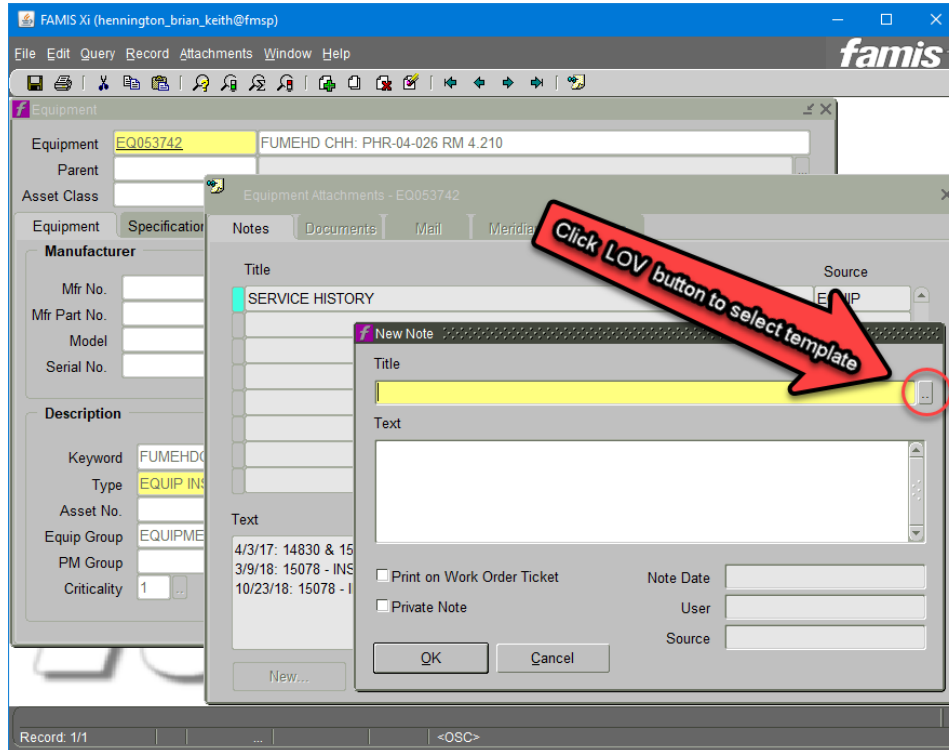
NOTE: Multiple "Titles" may be listed and each could contain a variety of information based upon the type of equipment.



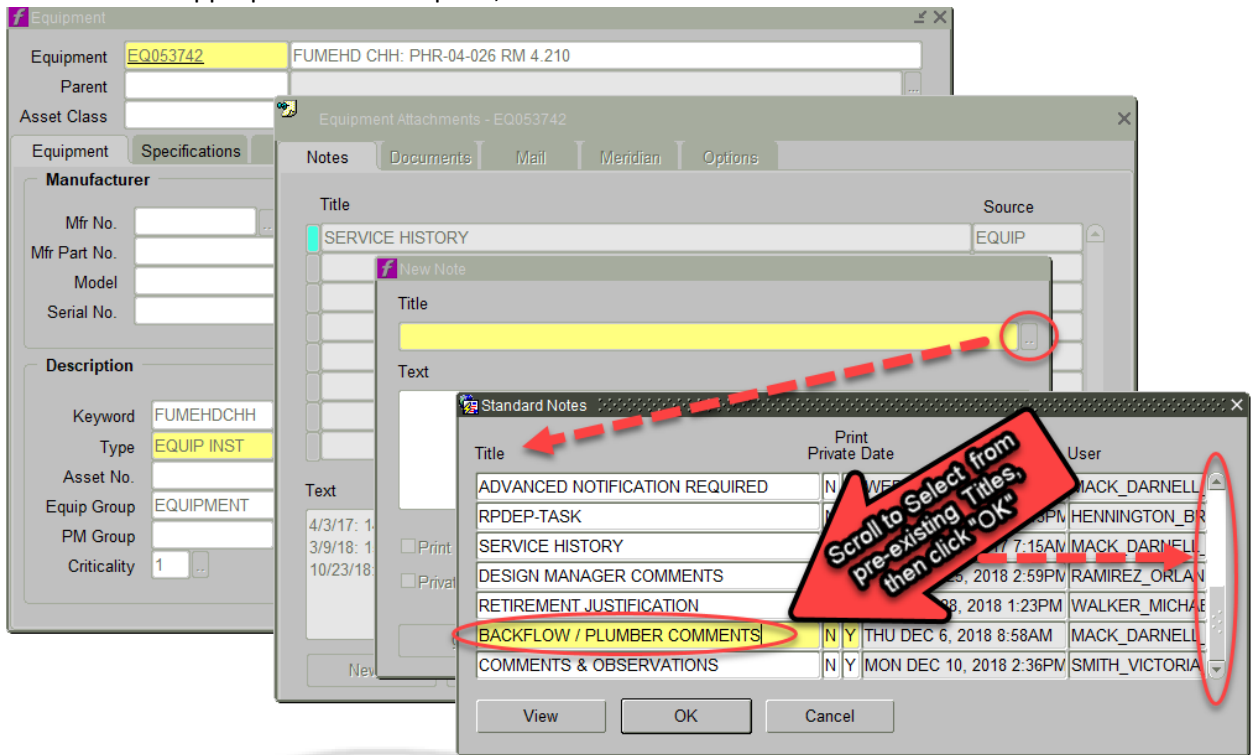
- E. Enter New Service History Notes for EQ# Record
 1. Click the **New...** button to enter a new Note



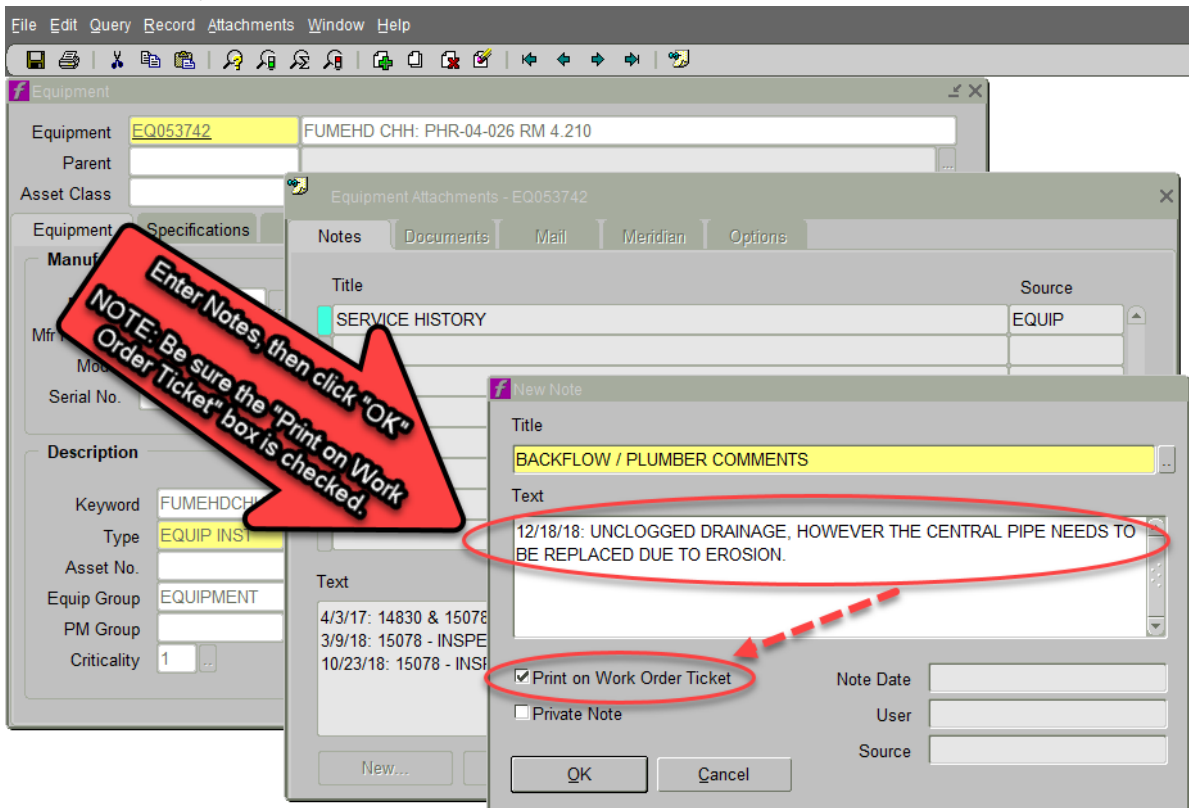
2. Click the **LOV (List Of Values)** button



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 shows the 'Equipment Attachments - EQ053742' window. The 'Notes' tab is active, displaying a table with the following data:

Title	Source
BACKFLOW / PLUMBER COMMENTS	EQUIP
SERVICE HISTORY	EQUIP

The 'Text' field below the table contains the following note:

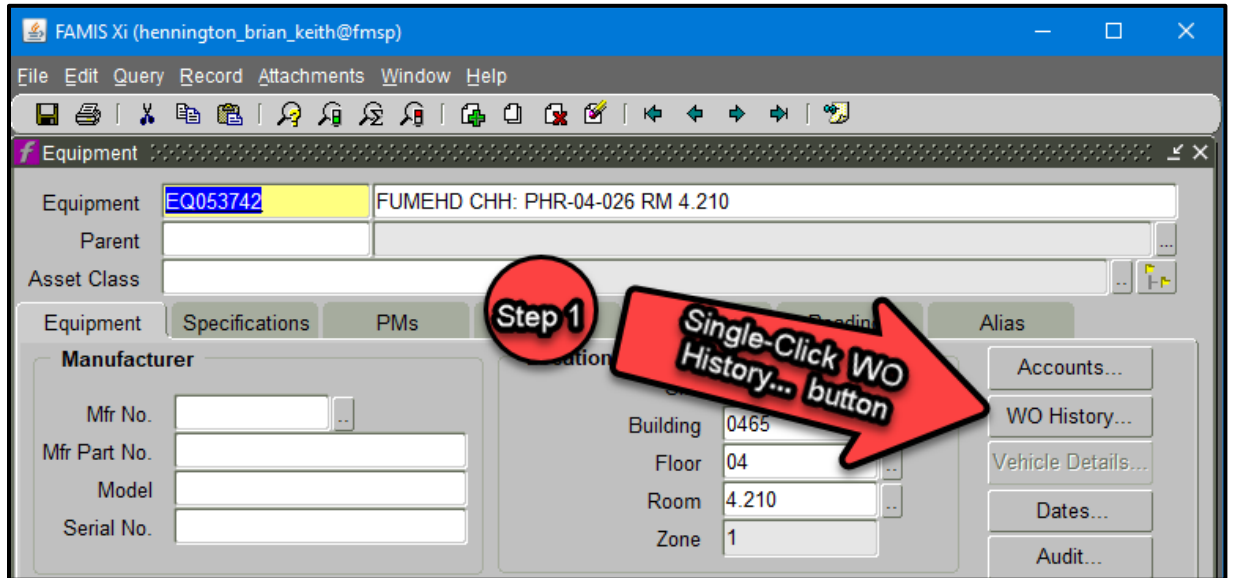
12/18/18: UNCLOGGED DRAINAGE, HOWEVER THE CENTRAL PIPE NEEDS TO BE REPLACED DUE TO EROSION.

Red annotations include:

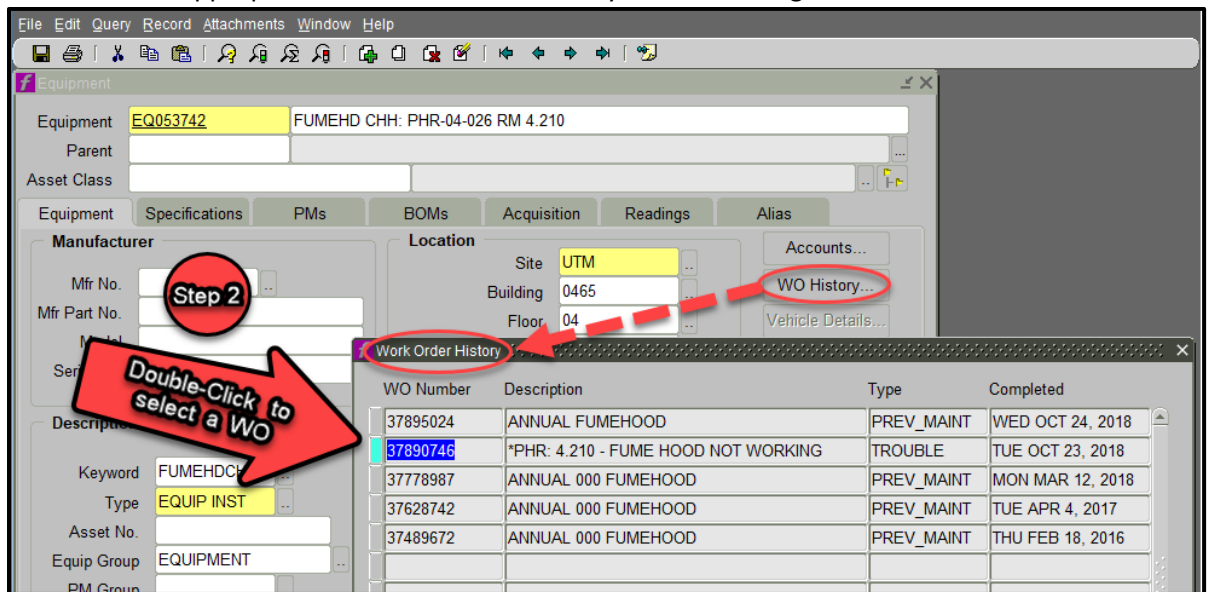
- A red arrow pointing to the 'BACKFLOW / PLUMBER COMMENTS' title with the text 'Single-Click "Backflow/Plumber Comments" Title'.
- A red arrow pointing to the text field with the text 'Review the New Note'.
- A red oval around the selected title.
- A red oval around the text content.

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



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

The screenshot shows a software window titled 'Equipment' with a menu bar (File, Edit, Query, Record, Attachments, Window, Help) and a toolbar. The main area contains fields for 'Equipment' (EQ053742), 'Parent', 'Asset Class', 'Manufacturer', 'Location' (Site: UTM, Building: 0465, Floor: 04), and 'Description' (Keyword: FUMEHDCHH, Type: EQUIP INST, Asset No., Equip Group: EQUIPMENT, PM Group, Criticality: 1). A 'Work Order History' window is overlaid, displaying a table of work orders. A context menu is open over the work order with ID 37890746, with 'View/Edit...' selected. A red arrow points from the 'View/Edit...' option to a red circle containing the text 'Step 3'.

WO Number	Description	Type	Completed
37895024	ANNUAL FUMEHOOD	PREV_MAINT	WED OCT 24, 2018
37890746	*PHR: 4.210 - FUME HOOD NOT WORKING	TROUBLE	TUE OCT 23, 2018
37778987	FUMEHOOD	PREV_MAINT	MON MAR 12, 2018
37628742	FUMEHOOD	PREV_MAINT	TUE APR 4, 2017
37489672	FUMEHOOD	PREV_MAINT	FRI FEB 18, 2016

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 field contains the value 'EQ001366' and a dropdown menu showing 'FLTR BANK 008 FOR AHU-1'. Other fields include 'WO Number' (37768155), 'Parent WO' (37768151), 'Status' (CLOSED), 'Start Date' (MON JAN 29, 2018), and 'Due Date' (FRI FEB 2, 2018).

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.

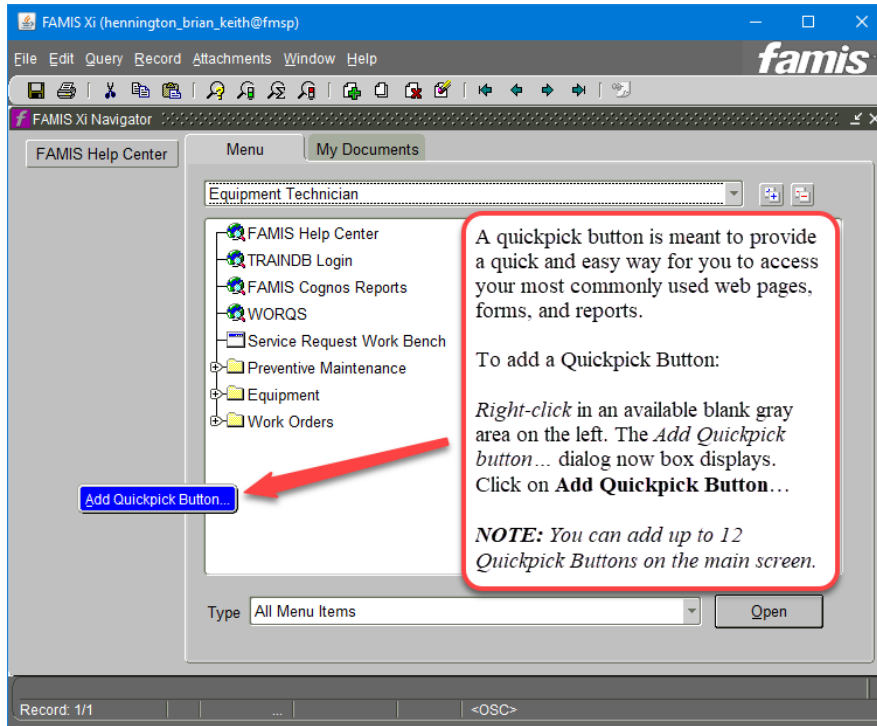
The screenshot shows the 'Tasks' tab of the same Work Order. A red arrow points to the 'Tasks' tab with the text 'Review Tasks TAB'. The main content area displays a list of 14 numbered tasks:

- 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.

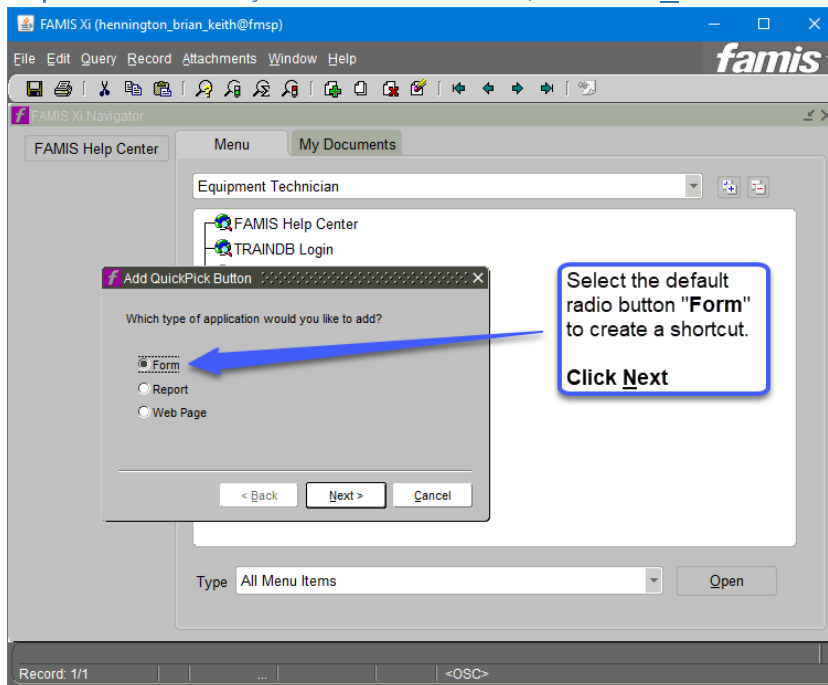
5. Appendix

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 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.