

Creating a Parent Work Order

1) PURPOSE

- a) To provide a standard procedure for creating FAMIS Parent Work Orders.

2) SCOPE

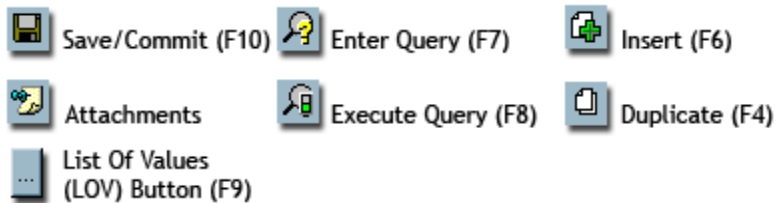
- a) This SOP applies to only those users assigned the responsibility of creating Parent Work Orders in FAMIS.

3) RESPONSIBILITY

- a) Only designated FAMIS users, as defined by the scope, should be performing this task.

4) COMMENTS

- a) This SOP references the following FAMIS shortcut icons:



- b) **Parent Work Orders...**

- i) Provide a way to easily and accurately enter Work Order billing information. Note that changing the PWO on the *Service Request* form will modify any existing billing information; changing the PWO on the *Work Order* form will **not** update the billing information.
- ii) Have an inactive status (BLKT_ORDER). Note that a PWO should **never** be used for posting labor or materials; charges are to be recorded against the Child Work Order.
- iii) Should include information in the Task List about where they are to be used, for what purpose and by whom. The requesters should also be listed here. If information changes, document in the Task List.

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5) PROCEDURE

- a) Open the **Service Request** form in FAMIS.
- b) Follow the standard **Creating Service Requests SOP** with the following modifications:

Service Request Form – Main Tab – General Information Section

The screenshot shows the 'Service Request' form in FAMIS. The 'General Information' section is highlighted with a red box. The form includes the following fields and sections:

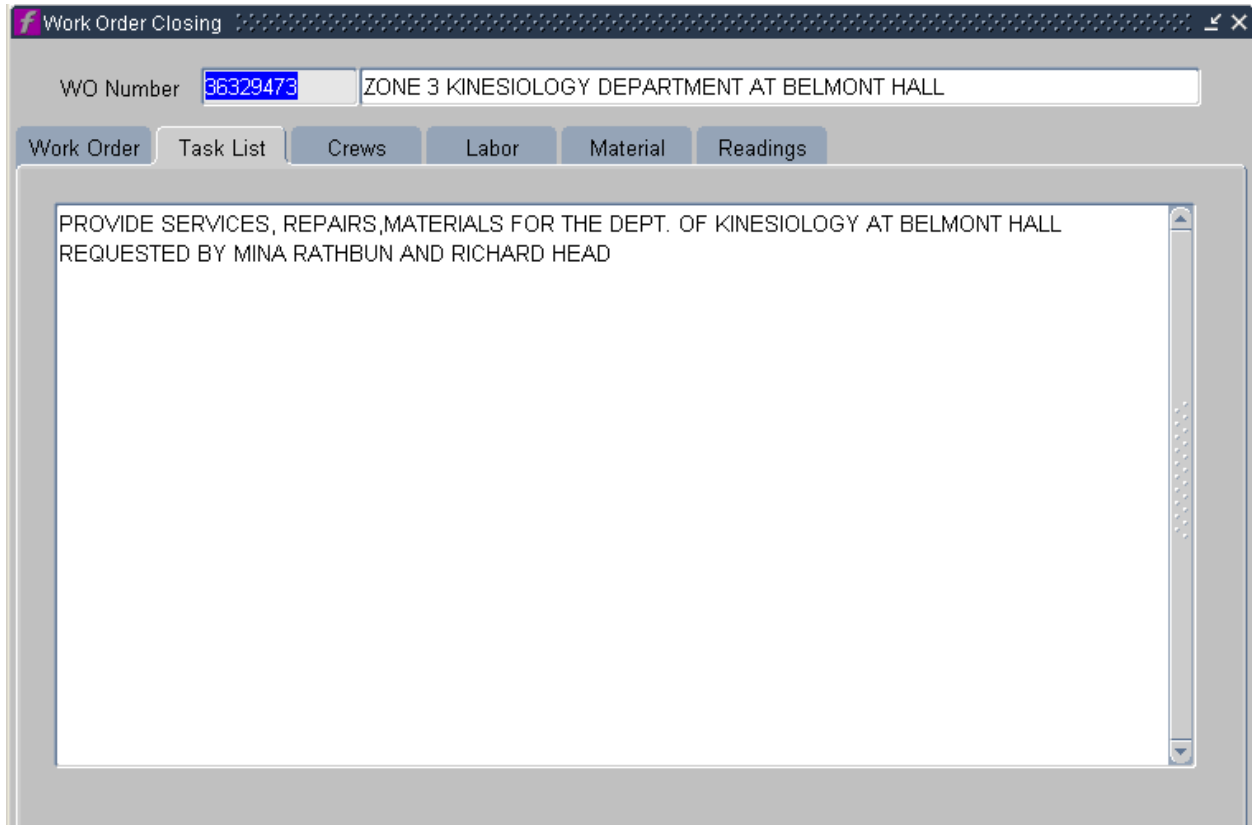
- SR Number**: [Text Field]
- Parent WO**: [Text Field]
- Capital Project**: [Text Field]
- Deficiency Project**: [Text Field]
- Requestor Information**:
 - Requestor**: [Text Field]
 - Telephone**: [Text Field]
 - Alternate Req**: [Text Field]
 - Alt Telephone**: [Text Field]
 - Request Date**: FRI JAN 12, 2007 10:13AM
- Location**:
 - Site**: UTM
 - Building**: [Text Field]
 - Floor**: [Text Field]
 - Room**: [Text Field]
 - Zone**: [Text Field]
- General Information** (highlighted):
 - Non-Avail Time**: [Text Field]
 - Type**: [Dropdown Menu]
 - Priority**: [Dropdown Menu]
 - Status**: [Dropdown Menu]
 - Equipment**: [Text Field]
 - Crew**: [Text Field]
 - Assigned To**: [Text Field]
 - Print Work Order Ticket**

Buttons on the right side of the form include: Billing..., Work Plan..., Print..., Check Dups..., Conv to Proj..., Create WO, Dates..., and Audit...

- c) In the General Information Section, complete the following:
 - i) **Type** - (required) Select **BLKT_PWO**
 - ii) **Priority** - (required) Set to **5**
 - iii) **Status** - (required) Select **SCHEDULED**
 - iv) **Crew** – (required) Type the 3-digit code of the Primary Crew or select from the Crew LOV.
- d) In the Location Section, complete the following:
 - i) **Site** - (required) Select appropriate site
 - ii) **Building, Floor, Room** - (optional) Enter values in these fields if the PWO is exclusively for use in a specific Building/Floor/Room.

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Work Plan Form – Main Tab – Task List Section



The screenshot shows a software window titled "Work Order Closing". At the top, there are two input fields: "WO Number" with the value "36329473" and a text field containing "ZONE 3 KINESIOLOGY DEPARTMENT AT BELMONT HALL". Below these fields is a tabbed interface with five tabs: "Work Order", "Task List", "Crews", "Labor", and "Material", and "Readings". The "Task List" tab is currently selected. The main content area of the "Task List" tab contains a text box with the following text: "PROVIDE SERVICES, REPAIRS, MATERIALS FOR THE DEPT. OF KINESIOLOGY AT BELMONT HALL REQUESTED BY MINA RATHBUN AND RICHARD HEAD".

- e) **Task List** – In the Task List, enter the PWO purpose, location, requestor, authorized users, and other relevant information.

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Service Request Form – Other Tab

The screenshot displays a web application window titled "Service Request". The main content area is divided into several sections. At the top, there are four input fields: "SR Number" (containing "SR340859"), "Parent WO", "Capital Project", and "Deficiency Project". Below these is a tabbed interface with four tabs: "Main", "Other" (which is selected), "Related Work", and "Routing". Under the "Other" tab, there are two columns of input fields. The left column contains "Contact Date", "Tracking 1", and "Tracking 2". The right column contains "WO Number" (containing "36692181") and "WO Status" (containing "OPEN").

- f) On the **Other** tab, click in the WO Number field. Right click to open pop-up menu and select "Close..." to launch the Work Order Closing form.

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Work Order Closing Form

g) Change the status to **BLKT_ORDER**

Work Order Closing

WO Number: 36692181 FC6: MAKE SIGNS AS REQUESTED FOR PTS

Work Order | Task List | Crews | Labor | Material | Readings

Equipment: ..

Close Dates

Audit...

Work Data

Status: BLKT_ORDER ..

Type: BLKT_PWO ..

Start Date: FRI OCT 2, 2009 ..

Due Date: WED OCT 7, 2009 ..

Arrived: ..

Completed: TUE AUG 10, 2010 4:45PM ..

Equipment Data

Down Time

Down:

Up:

Hours:

Usage:

Employee Data

Assigned To: ..

Authorized By: ..

Inspected By: ..

Performance Codes

Condition: ..

Cause: ..

Action: ..

i) **Note** – BLKT_ORDER is an Inactive status. Parent Work Orders should be CANCELED when the arrangement with the department has been dissolved.