

Creating a Standing Work Order (SWOs)

PROCEDURE

Standing Work Order Form – Header Section

The screenshot shows the 'Standing Work Order' form. The top section, 'General Information', is highlighted with a red border. It includes fields for SWO Number, CP Number, Deficiency, and Project. Below this is another 'General Information' section with fields for Status, Type, Assigned To, Method, Paycode, Budget Code, Department, Crew, Est. Hours, Craft, Tracking 1, and Tracking 2. To the right of these sections are buttons for Billing, Budget, Dates, Location Allocation, and Audit. At the bottom left is a 'Location' section with fields for Site (set to PRC), Building, Floor, Room, and Zone. At the bottom right is a 'Task List' section with a scrollable area.

1. In the top General Information section of the Standing Work Order form, complete the following:
 - a. **SWO Number** – (required) The number is automatically created after mandatory yellow fields are completed, billing information added, and the record is saved.
 - b. **SWO Description** – (required/unmarked) Tab to the description field and enter a brief description for the SWO. (Just to the right of the SWO Number field.)
 - c. **CP Number** – Enter the capital project to be associated with the SWO if required or click the LOV button to the right of the CP Number's description.
 - d. **CP Number Description** – (read-only/unmarked) Automatically loads CPs description.
 - e. **Deficiency Project** – Not used.
 - f. **Deficiency Project Description** – Not used.

Creating a Standing Work Order (SWOs)

Standing Work Order Form – General Information Section

Standing Work Order Form – General Information Section

General Information

SWO Number

CP Number

Deficiency

Project

Billing...

Budget...

Dates...

Location Allocatio...

Audit...

General Information

Status

Type

Assigned To

Method

Paycode

Budget Code

Department

Crew

Est. Hours

Craft

Tracking 1

Tracking 2

Location

Site

Building

Floor

Room

Zone

Task List

2. In the lower General Information section of the Standing Work Order form, complete the following:
 - a. **Status** – (required) Type or select OPEN, CANCELED, or CLOSED from the LOV.
 - a. Make the status OPEN for a new SWO.
 - b. Change the status to CANCELED for a SWO that has no charges and will never be used.
 - c. Change the status to CLOSED to close a SWO to future charges. NOTE: Unlike regular WOs, there is not a separate form for closing SWOs.
 - b. **Type** – (required) Enter the appropriate maintenance type.
 - i. MAINT – Used for maintenance related services. i.e. repetitive maintenance tasks such as lawn mowing or trash pick-up.
 - ii. SERVICES – Used for tracking internal services, i.e. supplies.
 - iii. CONTRACT – Used for tracking contract services.
 - iv. OVERHD_SWO – Used *only* for crew time management SWOs. See [Time Management](#) for more information.
 - c. **Assigned To** – Not used.
 - d. **Method** – Tab to or click in the Method field and enter the appropriate method.
 - e. **Paycode** – Not used.
 - f. **Budget Code** – Required when the SWO is associated with a Capital Project or when entering Custodial SWOs. Enter the capital project budget code by either typing directly into the site field or clicking on the LOV button to bring up the Budget Codes LOV, if applicable.
 - g. **Department** – Not used.
 - h. **Crew** – Enter the appropriate crew. Only one crew is permitted for each SWO.

Creating a Standing Work Order (SWOs)

- i. **Est. Hours** – Not used.
- j. **Craft** – If appropriate, enter the work performance craft by either typing directly into the craft field or clicking on the LOV button to bring up the Crafts form.
- k. **Tracking 1** – This field is used by Accounting and should not be populated when SWO is created. (LEAVE BLANK)
- l. **Tracking 2** – (not used)

Standing Work Order Form – Location Section

- 3. In the Location section of the Standing Work Order form, complete the following:
 - a. **Site** – (required) The Site field will default automatically to the site associated with the person entering the SWO. Change the site if necessary by clicking the ellipsis button and choosing the appropriate site or type the site abbreviation directly into the Site field.
 - b. **Building** – Enter the appropriate building information to be associated with the SWO if applicable.
 - c. **Floor** - Enter the Floor information if applicable.
 - d. **Room** – Enter the Room number if applicable.
 - e. **Zone** – The Zone field will populate automatically based on the building's associated zone.
- 4. **Task List** – The Task List field is a free text field. Enter the details needed to ensure that the proper SWO is used for future charges. This field may also be used to track fiscal year renewals.

Creating a Standing Work Order (SWOs)

Standing Work Order Form – Buttons Section

The screenshot shows the 'Standing Work Order' form with several sections. The 'Buttons Section' on the right side contains five buttons: 'Billing...', 'Budget...', 'Dates...', 'Location Allocatio...', and 'Audit...'. These buttons are enclosed in a red rectangular box. The main form area includes 'General Information' fields for SWO Number, CP Number, Deficiency, and Project; another 'General Information' section for Status, Type, Assigned To, Method, Paycode, Budget Code, Department, Crew, Est. Hours, Craft, Tracking 1, and Tracking 2; a 'Location' section for Site (set to PRC), Building, Floor, Room, and Zone; and a 'Task List' section with a scrollable list area.

5. In the buttons section of the Standing Work Order form, complete the following:
 - a. **Billing button** – Click here to enter Billing/Account information.

Billing Form – Header Section

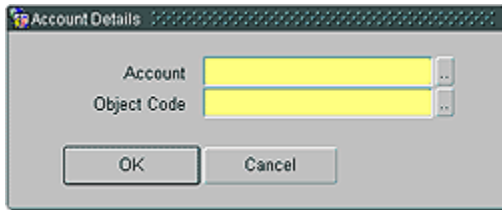
The screenshot shows the 'Billing' form. At the top, 'Billing Type' is a dropdown menu set to 'ACTUALS'. Below it is an 'Accounting Hold' checkbox (unchecked) and a 'Reason' text field. A section titled 'Account Details' contains a table with four columns: 'Account', 'Percent', 'Tracking Code', and 'Attribute2'. The table is currently empty. At the bottom of the form are several buttons: 'OK', 'Clear Account', 'Cancel', 'Tenants...', and 'Dates...'.

- i) In the Billing Form, complete the following:
 - ii) **Billing Type** - Remains ACTUALS.

Creating a Standing Work Order (SWOs)

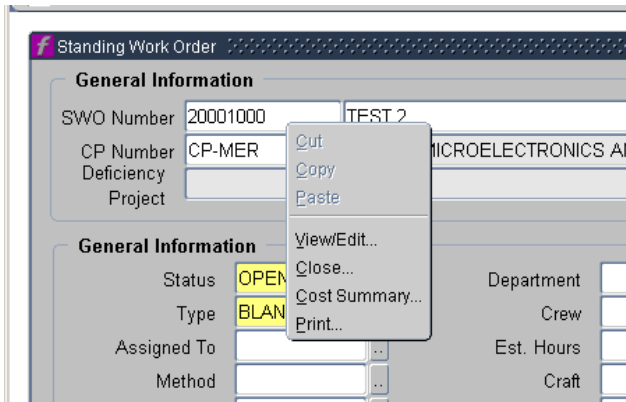
- (1) Click on the Account button to access the Account Details form where the account number is entered.

Billing Screen – Account Details



- iii) In the Account Details form, complete the following:
 - iv) **Account Number** – (required) Enter the appropriate account number or click on the LOV button to select it. NOTE: If the account number required is not found in the LOV, contact Accounting to have it added to the FAMIS general ledger.
 - v) **Object Code** - (required) Enter the appropriate object code.
- b. Click OK to return to the Billing screen.
 - c. **Percent field** - If only one account number is to be expensed, set to 100%. Percentages must always total 100%.
 - (1) Click the OK button to return to the SWO screen.
 - d. **Budget button** – (Not used) Click to view budget information.
 - e. **Dates button** – Opens Record Dates form which shows SWO entered modified and closed dates if applicable, and closed dates associated with appropriate charge types.
 - f. **Location Allocations button** - (Not used)
 - g. **Audit button** – Click to see a history of changes made to the SWO. May be blank.

Standing Work Order Form – Header Section



- h. The SWO screen will now show the assigned SWO number.
- i. To print the SWO, right click in the SWO Number field and choose Print.
- j. To print a cost summary, right click in the SWO Number field and choose Cost Summary.