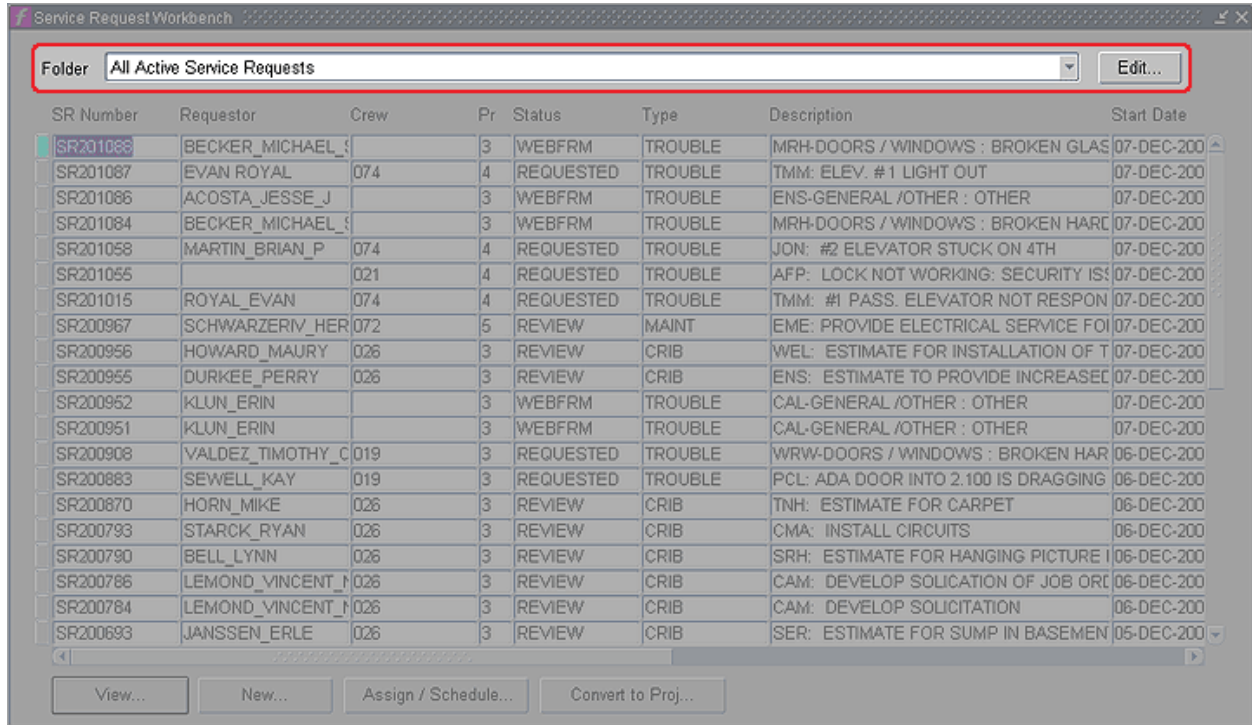


PROCEDURE

1. Open one of the FAMIS workbench forms. Make sure that it says 'All Active Service Requests' or 'All Active Work Orders' or 'All Active Capital Projects'.

Service Request Workbench Form – Header Section



The screenshot shows the 'Service Request Workbench' application window. At the top, there is a 'Folder' dropdown menu set to 'All Active Service Requests' with an 'Edit...' button next to it. Below this is a table with the following columns: SR Number, Requestor, Crew, Pr, Status, Type, Description, and Start Date. The table contains 20 rows of data. At the bottom of the window, there are four buttons: 'View...', 'New...', 'Assign / Schedule...', and 'Convert to Proj...'.

SR Number	Requestor	Crew	Pr	Status	Type	Description	Start Date
SR201083	BECKER_MICHAEL_		3	WEBFRM	TROUBLE	MRH-DOORS / WINDOWS : BROKEN GLAS	07-DEC-200
SR201087	EVAN ROYAL	074	4	REQUESTED	TROUBLE	TMM: ELEV. #1 LIGHT OUT	07-DEC-200
SR201086	ACOSTA_JESSE_J		3	WEBFRM	TROUBLE	ENS-GENERAL /OTHER : OTHER	07-DEC-200
SR201084	BECKER_MICHAEL_		3	WEBFRM	TROUBLE	MRH-DOORS / WINDOWS : BROKEN HARC	07-DEC-200
SR201058	MARTIN BRIAN_P	074	4	REQUESTED	TROUBLE	JON: #2 ELEVATOR STUCK ON 4TH	07-DEC-200
SR201055		021	4	REQUESTED	TROUBLE	AFP: LOCK NOT WORKING: SECURITY IS	07-DEC-200
SR201015	ROYAL_EVAN	074	4	REQUESTED	TROUBLE	TMM: #1 PASS. ELEVATOR NOT RESPON	07-DEC-200
SR200967	SCHWARZERIV_HER	072	5	REVIEW	MAINT	EME: PROVIDE ELECTRICAL SERVICE FOI	07-DEC-200
SR200956	HOWARD_MAURY	026	3	REVIEW	CRIB	WEL: ESTIMATE FOR INSTALLATION OF T	07-DEC-200
SR200955	DURKEE_PERRY	026	3	REVIEW	CRIB	ENS: ESTIMATE TO PROVIDE INCREASEC	07-DEC-200
SR200952	KLUN_ERIN		3	WEBFRM	TROUBLE	CAL-GENERAL /OTHER : OTHER	07-DEC-200
SR200951	KLUN_ERIN		3	WEBFRM	TROUBLE	CAL-GENERAL /OTHER : OTHER	07-DEC-200
SR200908	VALDEZ_TIMOTHY_C	019	3	REQUESTED	TROUBLE	WRW-DOORS / WINDOWS : BROKEN HAR	06-DEC-200
SR200883	SEWELL_KAY	019	3	REQUESTED	TROUBLE	PCL: ADA DOOR INTO 2.100 IS DRAGGING	06-DEC-200
SR200870	HORN_MIKE	026	3	REVIEW	CRIB	TNH: ESTIMATE FOR CARPET	06-DEC-200
SR200793	STARCK_RYAN	026	3	REVIEW	CRIB	CMA: INSTALL CIRCUITS	06-DEC-200
SR200790	BELL_LYNN	026	3	REVIEW	CRIB	SRH: ESTIMATE FOR HANGING PICTURE I	06-DEC-200
SR200786	LEMOND_VINCENT_	026	3	REVIEW	CRIB	CAM: DEVELOP SOLICITATION OF JOB ORC	06-DEC-200
SR200784	LEMOND_VINCENT_	026	3	REVIEW	CRIB	CAM: DEVELOP SOLICITATION	06-DEC-200
SR200693	JANSSEN_ERLE	026	3	REVIEW	CRIB	SER: ESTIMATE FOR SUMP IN BASEMEN	05-DEC-200

2. Click on the **Edit...** button next to the Folder/View window.

Edit Folder Form – Display Tab

The screenshot shows the 'Edit Folder' dialog box with the 'Display' tab selected. On the left, there are dropdown menus for 'Primary Sort' (set to 'Crew'), 'Secondary Sort' (set to 'WO Number'), and 'Sort Order' (set to 'Ascending'). Below these are checkboxes for 'Private' and 'Save Changes', and buttons for 'Duplicate...' (highlighted with a red box) and 'Delete...'. On the right, the 'Display Order of Columns' section has a list of fields: Crew, WO Number, Description, Building, Start Date, Status, Priority, Maint Type, Assigned To, Phase, Sec. Labor, Craft, and Equipment. 'Crew' is selected in the list. Above the list is a 'Move Field Up' button and below is a 'Move Field Down' button. At the bottom of the dialog are 'OK' and 'Cancel' buttons.

3. Click on the **Duplicate** button to create a custom view.

Edit Folder Form – Folder Name

The screenshot shows the 'Folder Name' dialog box. It has a title bar with a close button. Inside, there is a label 'New Folder Name' above a text input field. Below the input field are 'OK' and 'Cancel' buttons.

4. Name the Custom view/folder you are creating and click OK.

Edit Folder Form – Display Tab – Sort Section

The screenshot shows the 'Edit Folder' dialog box with the 'Display' tab selected. The 'Sort' section is highlighted with a red box. It contains three dropdown menus: 'Primary Sort' (set to 'Crew'), 'Secondary Sort' (set to 'WO Number'), and 'Sort Order' (set to 'Ascending'). Below these are two checked checkboxes: 'Private' and 'Save Changes'. There are also buttons for 'Duplicate...', 'Delete...', 'Move Field Up', and 'Move Field Down'. The 'Display Order of Columns' list on the right includes: Crew, WO Number, Description, Building, Start Date, Status, Priority, Maint Type, Assigned To, Phase, Sec. Labor, Craft, and Equipment.

5. Display tab

- a. The **Private** checkbox will now be checked. This checkbox indicates when the view is private (checked). Only the person currently logged in can see it, or public (unchecked), every FAMIS user can see it.
 - i. Do not uncheck this checkbox.
- b. The **Save Changes** checkbox will now be checked. This checkbox indicates that changes will be saved if the user clicks the OK button.
 - i. If you start with a private view this checkbox will be editable by default.
 1. **Ex.** When you click on the **Edit** button on your workbench and the view selected is 'Work Orders for Fred Flintstone in MAI'. This is one of Fred's custom views, no one else can see it, so by default he can save or not save the changes he makes.
 - ii. Unchecking this checkbox will keep your workbench view changes from being saved.
- c. **Primary Sort** – Select the sort options from the dropdown list.
- d. **Secondary Sort** – Select the sort options from the dropdown list.
- e. **Sort Order** – Select Ascending or Descending

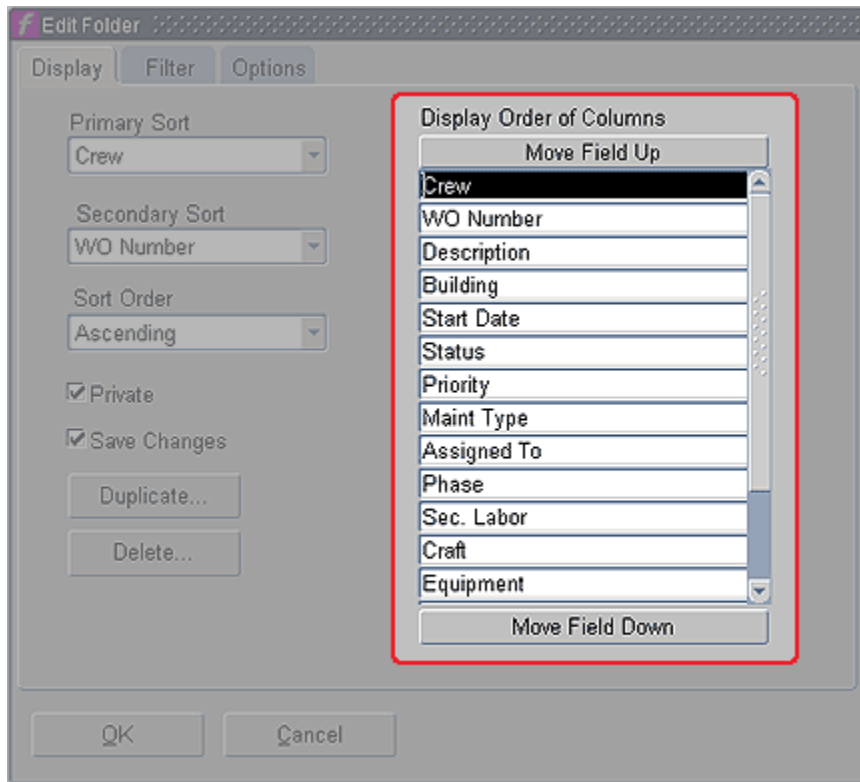
Creating Custom Workbench Views

Edit Folder Form – Display Tab – Checkboxes and Buttons

The screenshot shows the 'Edit Folder' dialog box with the 'Display' tab selected. On the left, there are dropdown menus for 'Primary Sort' (set to 'Crew'), 'Secondary Sort' (set to 'WO Number'), and 'Sort Order' (set to 'Ascending'). Below these are checkboxes for 'Private' and 'Save Changes', both of which are checked. At the bottom left, two buttons, 'Duplicate...' and 'Delete...', are highlighted with a red rectangular box. On the right side, there is a 'Display Order of Columns' list with 'Crew' selected at the top. Above the list is a 'Move Field Up' button and below it is a 'Move Field Down' button. The list contains the following fields: Crew, WO Number, Description, Building, Start Date, Status, Priority, Maint Type, Assigned To, Phase, Sec. Labor, Craft, and Equipment. At the bottom of the dialog are 'OK' and 'Cancel' buttons.

6. **Duplicate** – Click on this button to make a copy of your current view to modify into a custom view.
7. **Delete** – Click on this button to delete the selected custom view.

Edit Folder Form – Display Tab – Display Order of Columns Section



8. Display Order of Columns Section

- a. **Move Field Up** – Allows you to change the display order of the listed columns by choosing a column name and moving it up the list.
 - i. The column at the top of the list is the column farthest to the left on the Workbench form.
- b. **Move Field Down** – Allows you to change the display order of the listed columns by choosing a column name and moving it down the list.
 - i. The column at the bottom of the list is the column farthest to the right on the Workbench form.

Edit Folder Form – Filter Tab

The screenshot shows the 'Edit Folder' dialog box with the 'Filter' tab selected. The dialog has three tabs: 'Display', 'Filter', and 'Options'. The 'Filter' tab contains the following fields:

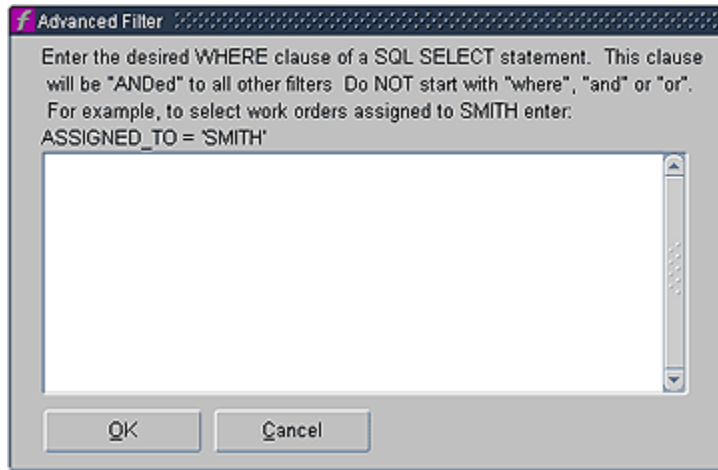
- Crew: ALL
- Craft: ALL
- Labor: Both
- Maintenance Type: ALL
- Request Type: ALL
- Maximum Priority: ALL
- Status: All Active Statuses
- Assigned To: ALL
- Site: ALL
- Building: ALL
- Include Child Route WOs?: No

At the bottom of the filter section, there is an 'Advanced Filter...' button and a checked checkbox labeled 'Advanced Filter In Use'. The dialog also features 'OK' and 'Cancel' buttons at the very bottom.

9. Filter Tab

- a. **Crew** – Allows you to choose a crew to filter on.
- b. **Craft** – Allows you to choose a craft to filter on.
- c. **Labor** – Allows you to choose Primary, Secondary or both to filter on.
- d. **Maintenance Type** – Allows you to choose a maintenance type or ALL to filter on.
- e. **Request Type** – Allows you to choose a request type or ALL to filter on.
- f. **Maximum Priority** – Allows you to choose a maximum priority or ALL to filter on.
- g. **Status** – Allows you to choose a status, All Active Statuses, All Inactive Statuses, or ALL to filter on.
- h. **Assigned To** – Allows you to choose an Assigned To user number or ALL to filter on.
- i. **Site** - Allows you to choose a Site or ALL to filter on.
- j. **Building** - Allows you to choose a Building or ALL to filter on.
- k. **Include Child Route WOs?** – Allows you to include child work orders or not.
- l. **Advanced Filter button** - Allows you to create custom views with more detail than available in the dropdown lists.
- m. **Advanced Filter In Use** – Indicates whether (checked) or not (unchecked) an Advanced Filter currently exists in this view.
- n. Click on the Advanced Filter button.

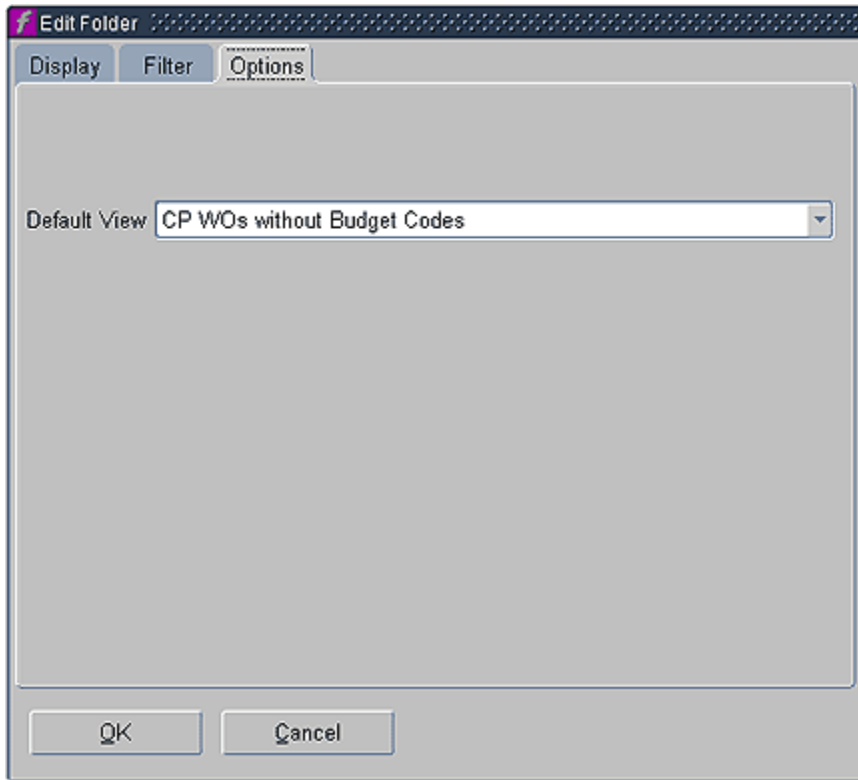
Workbench View Advanced Filter Form



- i. **Text box** – This text box is where the advanced filter is entered.
 1. If you need an advanced filter, call 232-5020 or email worqs@austin.utexas.edu with the details of the workbench information you need. Once you receive a reply, you will paste the appropriate filter sent you into this field.
- ii. Click on OK.

10. Click on the Options Tab.

Edit Folder Form – Options Tab



The screenshot shows a dialog box titled "Edit Folder" with three tabs: "Display", "Filter", and "Options". The "Options" tab is selected. Inside the dialog, there is a "Default View" label followed by a dropdown menu. The dropdown menu is currently set to "CP WOs without Budget Codes". At the bottom of the dialog, there are two buttons: "OK" and "Cancel".

- a. **Default View** – This allows you to choose your Default Workbench View. This view will open every time you open your associated workbench.
- b. Click OK to close the Folder form and return to the Workbench form. Your new custom view will be selected.