Using FAMIS for Event Management

Last Updated: January 14, 2019

Contents

Overview of FAMIS

FAMIS is a web-based system used by Facilities Management (FMAS) Building Services to manage campus events hosted by McGill University and by clients external to McGill. FAMIS is used in conjunction with Kronos, a web-based system, used to manage custodial staff.

FAMIS is used to:

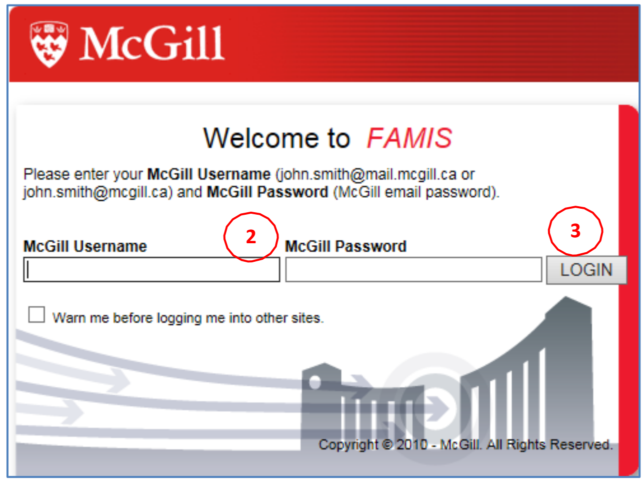
- Create a Service Request
- Create a Work Order from the Service Request for Campus Events Management – capturing details of the event (who, where, when, what, etc)
- Coordinate resources to provide the required materials (chairs, tables, etc.)
- Enter into the Work Order the detailed instructions determined from Kronos for:
  - Equitable distribution of overtime among full-time employees
  - Temporary (casual work) assignments
- Bill internal and external clients for services rendered
  - Import data from Banner & verify that data entered is accurate (e.g. FOAPAL)
  - Export and upload internal and billing data into the Univeristy's financial system (Banner)
- Print Work Order sheet, that includes the tasks an employee is required to perform
- Produce required reports

Getting Started:

1. Ensure that the certificate for FAMIS is installed on your computer.	If the certificate is not installed, contact your Administrator or IT Support.
2. Ensure that you are granted the access to use FAMIS.	If you cannot log in to FAMIS, contact your Administrator or IT Support.
3. Ensure that you are using the **Internet Explorer** as the browser.	FAMIS only works with Internet Explorer.
4. If you have any other issue with FAMIS.	Refer to the Troubleshooting FAMIS section first. If this still does not work, contact IT Support.

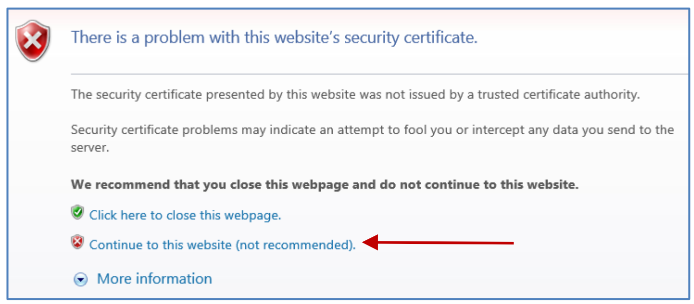
Log into FAMIS

1. Navigate using **Internet Explorer** to https://myfacilities.mcgill.ca/pfamis

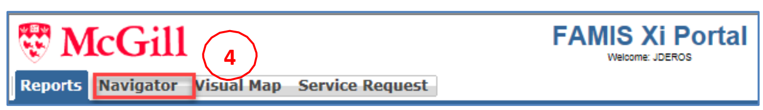


2. Log-in to **FAMIS** using your McGill Username and Password.
3. Click **LOGIN**.

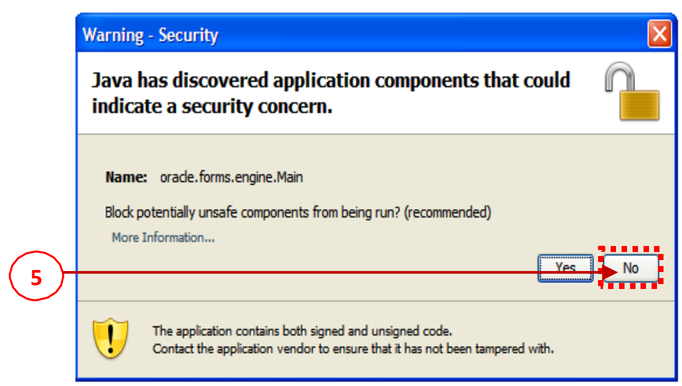
> **Note**
>
> If you get the security warning shown on the right, click the following warning message until it disappears:
>
> ***'Continue to this website** (not recommended)'*



4. Click the **Navigator** tab from the top.

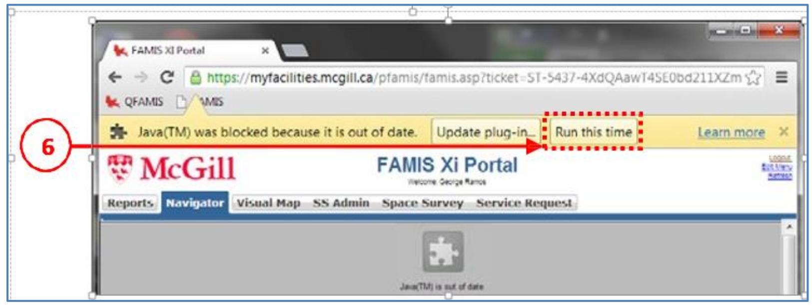


5. If you get the **Warning – Security** message, click '**No**'.

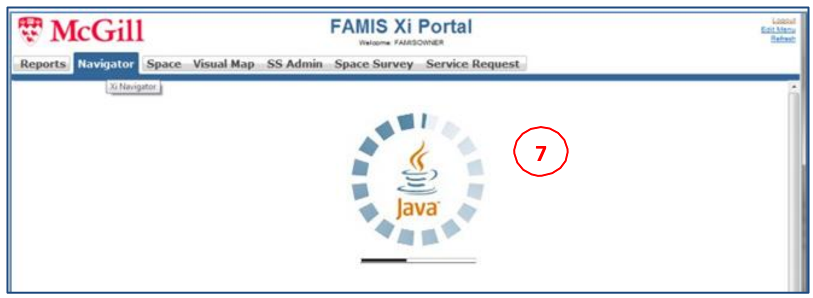


6. If you get the warning that Java is out of date, click '**Run this time**'.

   Do not click 'Update plug-in' – FAMIS may then not work on your computer.



7. You should see the **Java** logo while it loads.



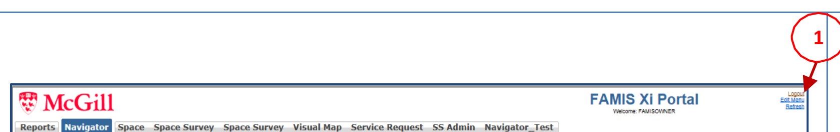
Note

If the FAMIS Navigator does not load, refer to the [Troubleshooting FAMIS](#) section.

If this does not work, contact your Administrator or [IT Support](#).

Log Out of FAMIS

1. Click **Logout** from the top-right corner of the FAMIS screen.



Note

You may have to sometimes log out and then log back in if FAMIS is not working properly.

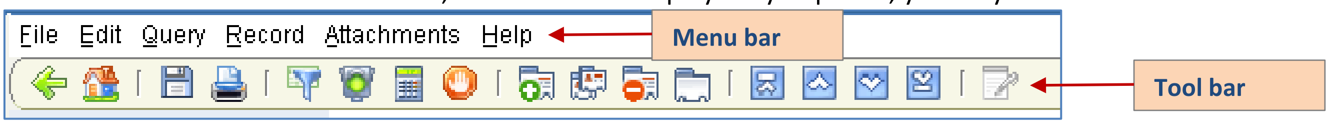
For more information, see the [Troubleshooting FAMIS](#) section.

FAMIS Navigator environment

Almost every screen in FAMIS Navigator (e.g. Service Request, Work Order) has the same set of icons on the menu and tool bars.

FAMIS tool bar and menu bar

When you hover over an icon on the tool bar, the icon name displays. If you prefer, you may use the menu bar.



Icon	Icon Name	Description
	Back	Go back to previous screen.
	Home	Go back to the FAMIS Home page. If you need to open another form, click the **Home** icon first.
	Save/Commit	Save your changes.
	Screen Print	Print your screen.
	Enter Query	Use to enter a query. Or you may use **F7**.
	Execute Query	Use to execute a query. Or you may use F8.
	Cancel	Use to cancel (stop) a query.
	Count Hits	Use to see how many records will be returned by the query you entered.
	Insert	Use to insert a record.
	Duplicate	Use to duplicate a record.
	Clear	Use to undo all the typing that you entered on a form.
	First, Previous, Next, Last	Use to scroll through records.

FAMIS field colors

FAMIS forms use three different colors to distinguish between fields: yellow, white, blue.

Color	Means…
YELLOW	Mandatory fields – these fields must be filled in.
WHITE	Data fields (that are not mandatory).
BLUE	Indicates that you are in query mode. See the Query mode section below on how to perform queries.

Query mode

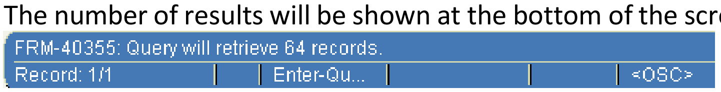
A query lets you find things (e.g. Service Request, Work Order, Building, Room, Requestor).

To perform a query:

1. On your keyboard, press **F7** or click on from the tool bar to enter query mode. The fields will turn <u>blue</u>.

2. Enter the query in a field (e.g. SR description field).
    a. For any query you run, use the **%** symbol as a "wildcard" to replace any text (e.g. %ARENA%)

3. To see how many records will be returned by the query you entered, press the "Count Hits" icon.
    a. The number of results will be shown at the bottom of the screen in the blue status bar.

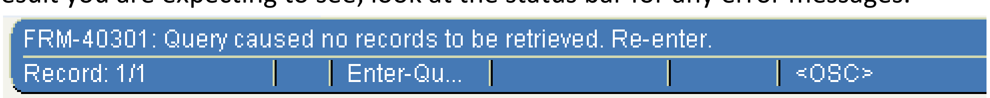


4. On your keyboard, press **F8** or click on from the tool bar to run the query.

5. If you ran a search that returned more than one record, use the up and down arrow keys from the tool bar to view each record, one at a time. You may also use the up and down arrows on your keyboard.

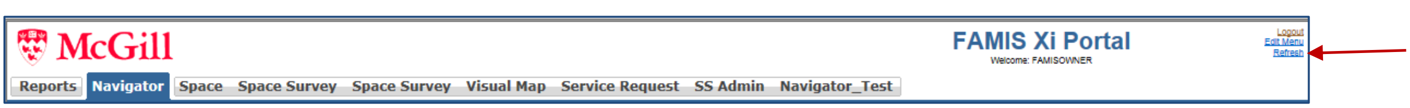
Status bar

The status bar (blue bar) is located at the bottom of the screen. If you are having problems with FAMIS or you do not see the result you are expecting to see, look at the status bar for any error messages.



Refresh

If you are having issues with FAMIS (e.g. buttons or icons do not work properly), click the "**Refresh**" link at the top-right corner of your screen.



Set up your favorites

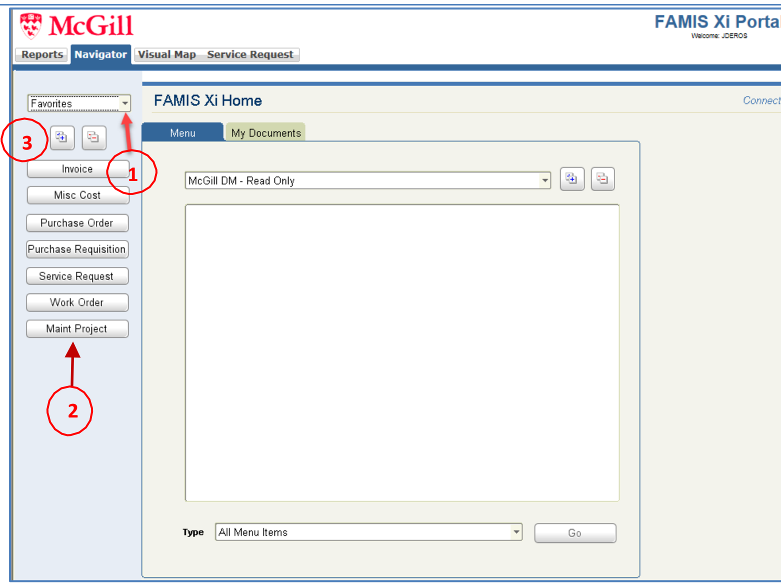
To add or remove favorites from your FAMIS menu.

Add favorite

1. From the left, click on the down-arrow and select **Favorites**.

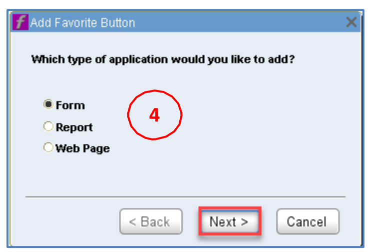
2. Your favorites that are already set up display (e.g. Service Request, Work Order).

3. Click the **Add Favorite** button 



> **Tip**
>
> Favorites that you may consider adding are:
>
> - Service Request
> - Work Order
> - Work Order Closing
> - Work Order Job Costing

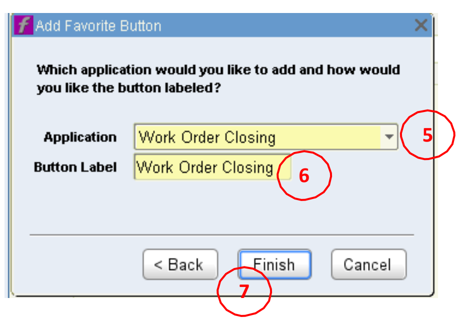
4. From the **Add Favorite Button** screen, select '**Form**' and click **Next**



5. Click on the down-arrow next to **Application** to select the favorite. (e.g. Work Order Closing)

6. Type an appropriate label in the **Button Label** field.

7. Click **Finish**. The new favorite will now be added to your list of favorites.

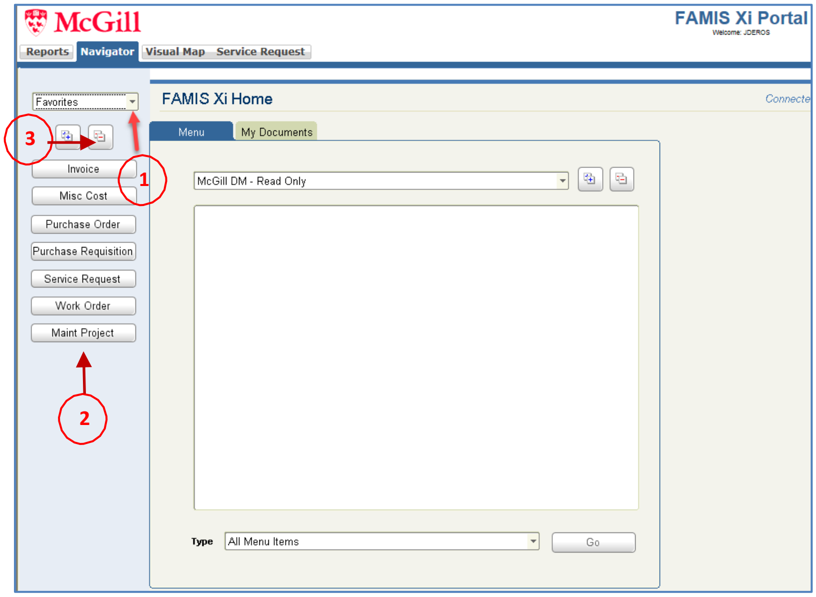


Delete favorite

1. From the left, click on the down-arrow and select **Favorites**.

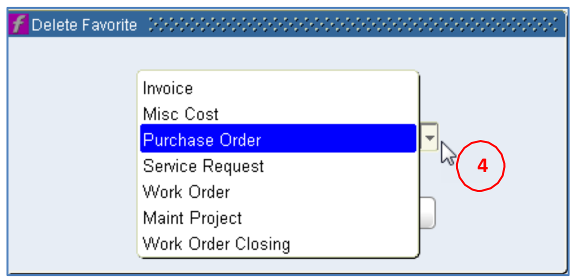
2. Your favorites that are already set up display (e.g. Service Request, Work Order).

3. Click the **Delete Favorite** button 



4. From the **Delete Favorite** screen, click the down-arrow to select the favorite you wish to delete.

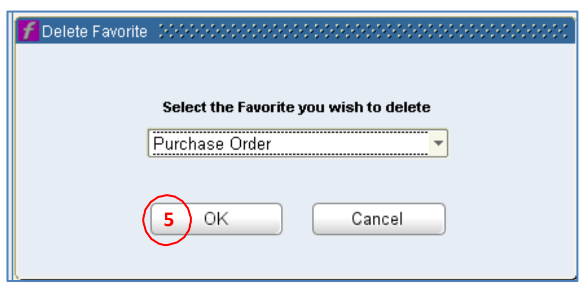
5. Click **OK**. The favorite will disappear from your list of favorites.



Tip

Favorites that you may consider deleting are:

- Invoice
- Purchase Order
- Main Project

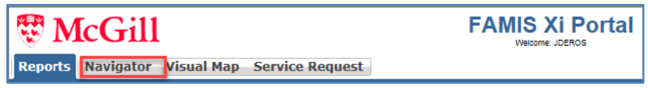


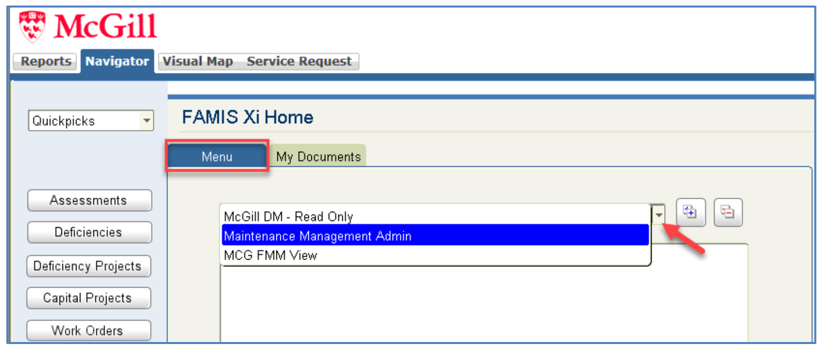
Ensure client exists

Before you create a Service Request, it is recommended that you first verify if the requestor is already set up in the client database.

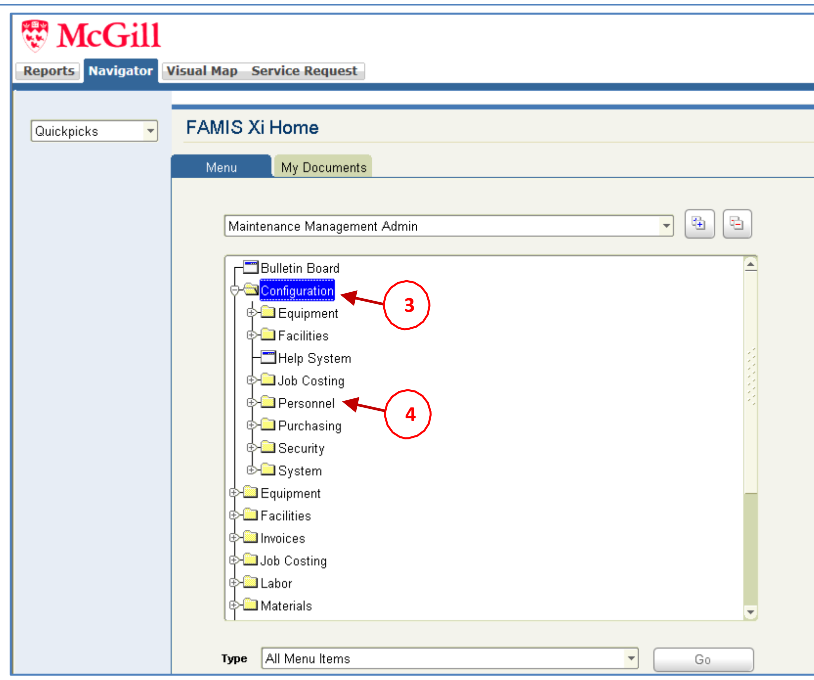
Access client database

1. Click the **Navigator** tab at the top
2. From the Menu tab, click on the down-arrow and select **Maintenance Management Admin**.

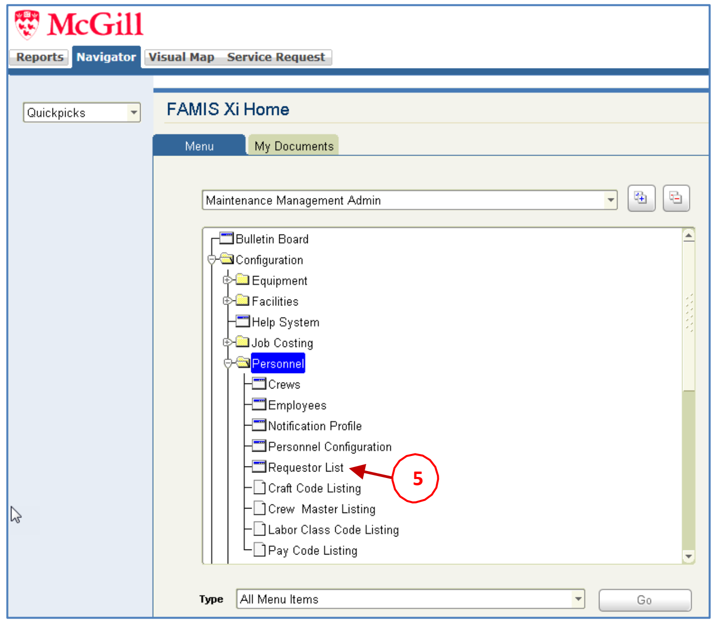




3. Double-click **Configuration**.
4. Double-click **Personnel**



5. Double-click **Requestor List**



6. The **Requestor Information** screen displays.

   a. Press F7 or click on icon from tool bar. *(fields will turn blue)*

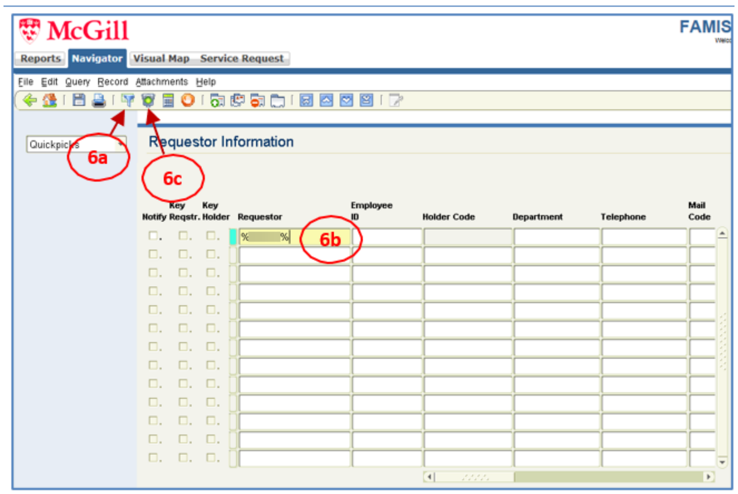
   

   b. Enter the client's last name, surrounded by %.

   c. Press F8 or click on icon from tool bar.

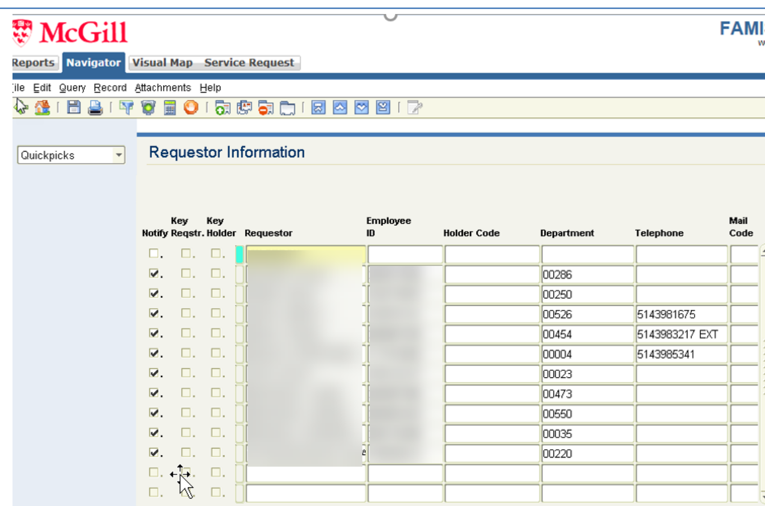
   

   d. Ensure that the client's name is in the list. If it is not, you will have to contact the Administrator to add the client.



7. Click the **Home** icon .

> **Tip**
>
> If you have already started creating your service request, you may also open a second navigator to verify if your client exists in the database.

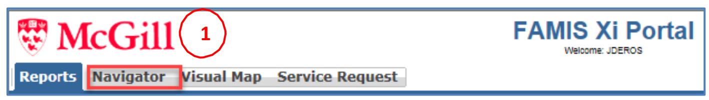
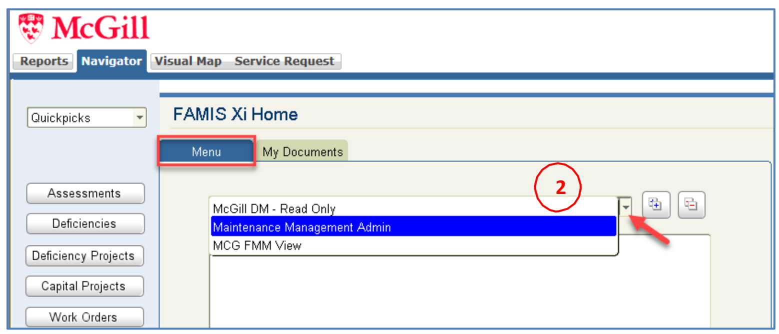
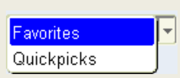
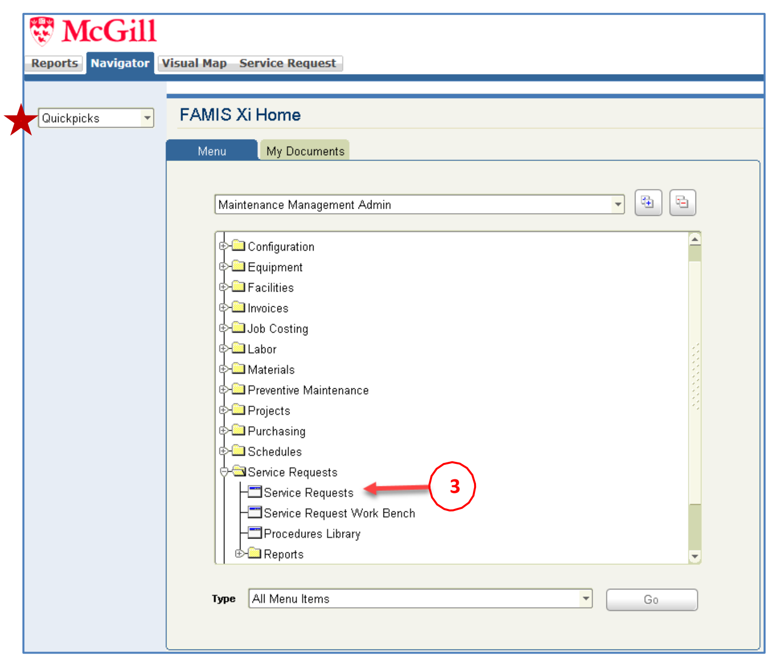


Create an Events Firm Price Bid (EVT FIRM PRICE BID) Request

When the Events Support team receive a service request via email, they must use FAMIS to create the Service Request and the Work Order. Before creating the service request, ensure that the client already exists in the system. See the section Ensure client exists for details on how to do this.

For work orders that involve different crews or units (e.g. custodial, event support, rental), you will have to create work orders with a parent-child relationship. Create the parent work order following the steps below. Then, create one or more child work orders (described in the Create a Child Work Order section).

Create a Service Request

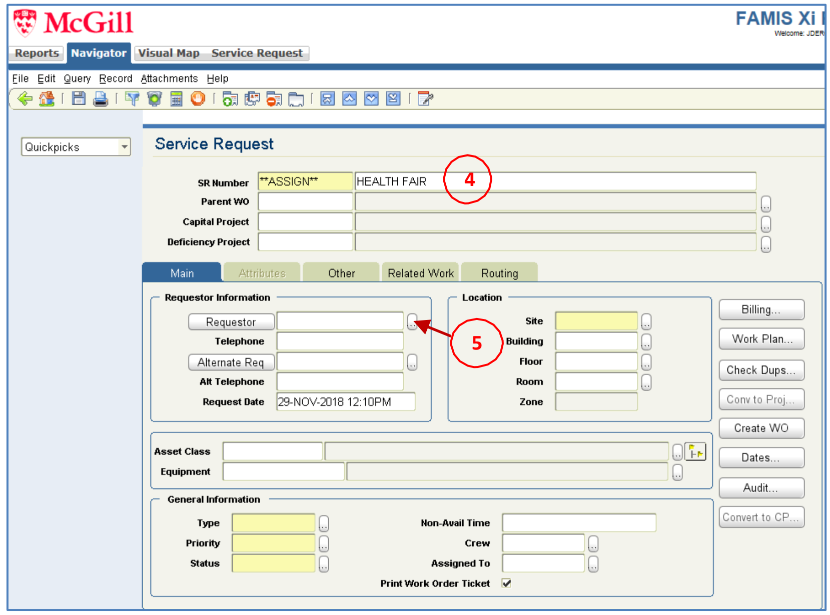
1. Click the **Navigator** tab at the top	
2. From the Menu tab, click on the down-arrow and select **Maintenance Management Admin**.	
3. Folders display. Click the **+** next to **Service Requests** (or double-click) and double-click **Service Requests**. **Tip** If you have set up Service Requests as a favorite: • Click on the down-arrow next to Quickpicks ★  • Select **Favorites** • The favorites that are already set up display • Select **Service Requests** Refer to Set up your favorites section for details on setting up favorites.	

4. The Service Request form displays. Click in the description field next to **SR Number** field. Type the event description.

   *The **SR Number** field (service request number) indicates* **ASSIGN** .

5. From the **Main** tab, click next to the **Requestor** field.

> **Note**
>
> It's a good idea to first ensure that the client exists before creating the service request. See Ensure client exists for details.
>
> New clients will have to be created by staff with administrative privileges. Contact your Administrator.



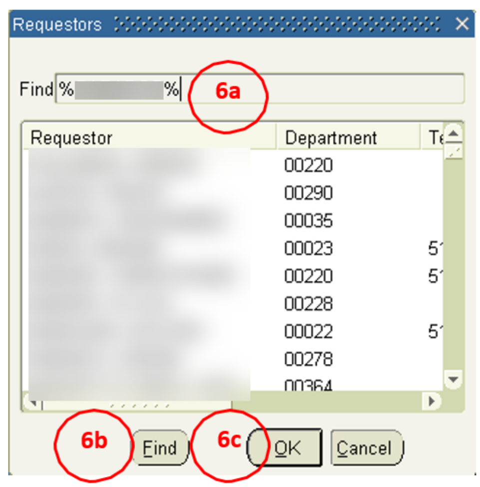
6. The **Requestors** window displays. In the **Find** field:

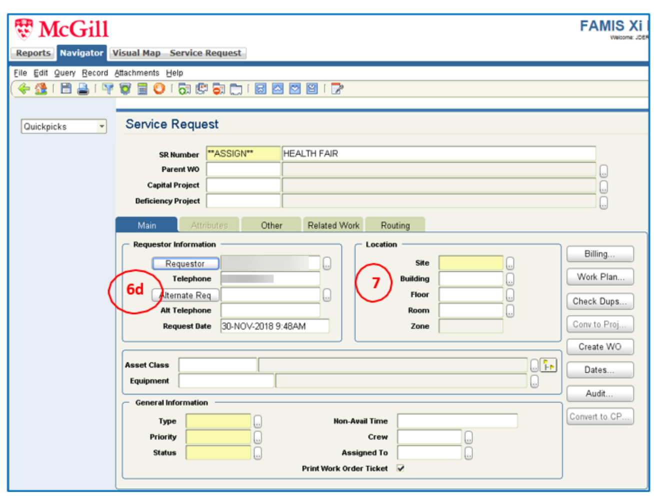
   a. Enter client's last name, surrounded by %.
   You can type the name in upper-case or lowercase characters (e.g. %NAME%).

   b. Click **Find**.

   c. If more than one person has the same name, select the client's name. Click **OK**.

   d. If only one person with that name exists, the person's name displays in **Requestor** field.
      - Client Telephone and Request Date display.
      - You may enter/update the telephone.





7. Enter the **Location** information. Enter the fields or click to search for the fields.
   a. **Site**: enter '1' for Downtown campus or
      '2' for Macdonald campus

   b. **Building**: enter building code or name. Press Tab. Or click on, find and select the building and click **OK**.

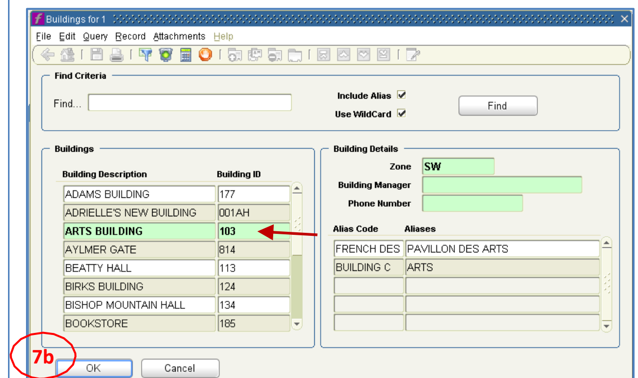
   c. **Floor**: enter the floor code or click on to select the floor and click **OK**.

   d. **Room**: enter the room code or click on to select the floor and click **OK**.

Note

Site is the only required field. If there are multiple buildings, floor or rooms, leave the field(s) blank.

The **Zone** field is automatically entered.



8. Enter the **General Information** section.
   For each field (**Type**, **Priority**, **Status**):

Type:

a. Click next to the Type field.
b. Select a value: **EVENTS** or **REN EVENTS**
   EVENTS – for one or multiple teams
   REN EVENTS – events that require rentals
c. Click **OK**

Priority: :

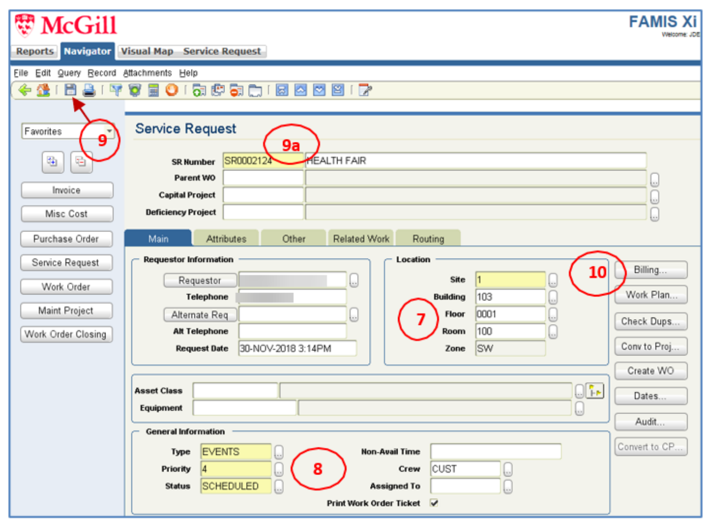
a. Click next to the Priority field.
b. Select a value *(see below for values)*:
   '**1**' for EMERGENCY
   '**4**' for REGULAR
c. Click **OK**

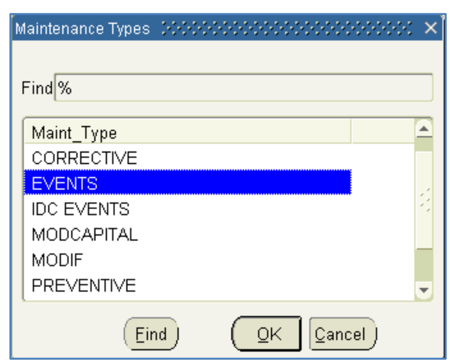
Status:

a. Click next to the Status field.
b. Select '**SCHEDULED**' *(this triggers a work order)*
c. Click **OK**

9. Click **Save** from the Navigator tool bar.
   a. **SR Number** for your request is now created.

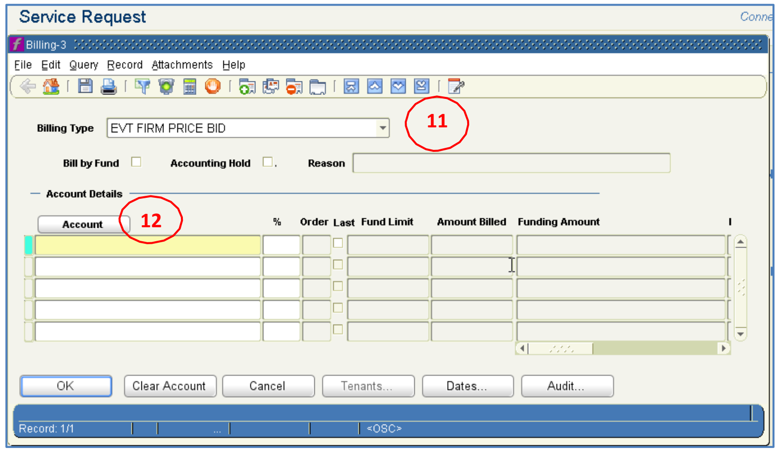
10. Click **Billing** from the right.





11. The **Billing-3** screen displays. Click the down-arrow to select the appropriate **Billing Type**. For a definition of each type, refer to the Glossary.
    a. **EVT FIRM PRICE BID** *(firm price bid)*
    b. **EVT NON-BILLABLE** *(not charged to client)*

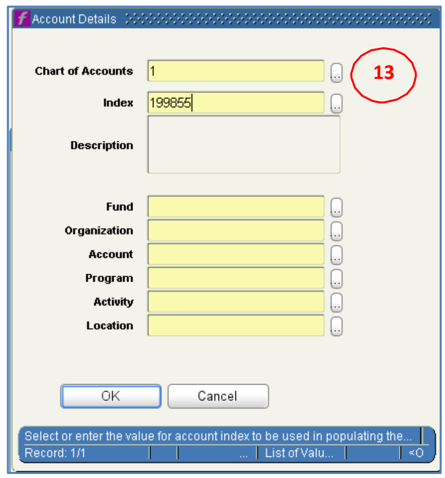
12. Click **Account**.



13. The **Account Details** screen displays. Enter the FOAPAL(s) to be charged for internal clients. Enter these fields or click to search:

    a. **Chart of Accounts**:
    '**1**' for internal clients
    '**EXT**' for external clients (e.g. student associations)

    b. **Index**:
    enter or select the fund



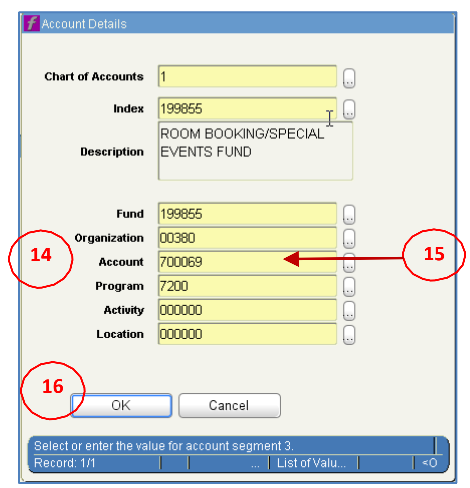
14. Press **Tab**. Most of the FOAPAL fields will be automatically filled. The Description field will enter a description for the fund.

15. Enter the appropriate **Account** for the service being requested. *Contact the Administrator if you do not know what account to enter.*

16. Click **OK**. *It will only be saved if FOAPAL exists.*

Note

Note: if your **F**und/**O**rganization/**P**rogram do not display, this means that either:
a. FOAPAL is invalid
b. FOAPAL was created today and you will need to wait until tomorrow to enter it. Take note of the **Work Order #**. If it is still not valid the next day, contact client to inform them that FOAPAL they provided is not in Banner and is not valid.

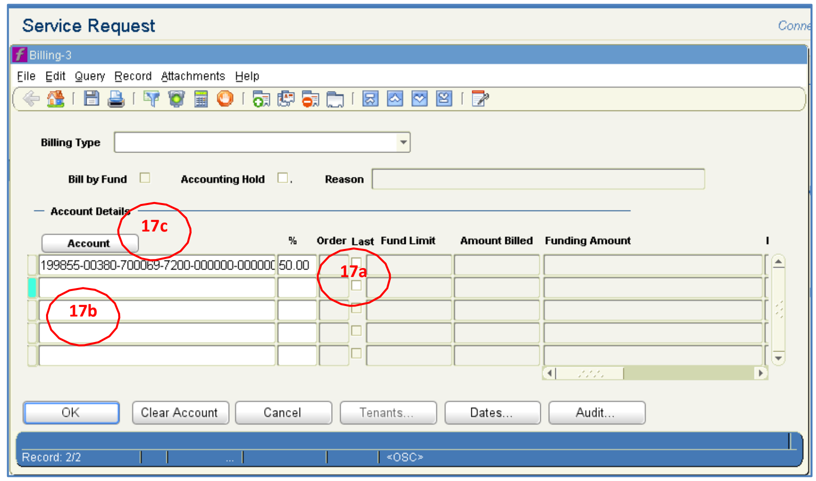


17. The **Billing-3** screen displays with the FOAPAL you entered. If there is more than one FOAPAL *(this occurs when clients are sharing costs)*:

    a. Enter % for the first FOAPAL entry
    b. Click on the next empty FOAPAL record *(displays as a green indicator)*
    c. Click **Account** to enter the second FOAPAL
    d. Follow steps 13 to 16 above.
    e. Enter % for the second FOAPAL entry.

Note

- Enter more than one FOAPAL when clients are sharing costs.
- Ensure that the % add up to 100%.
- If you only have 1 FOAPAL, you do not have to enter the % field.



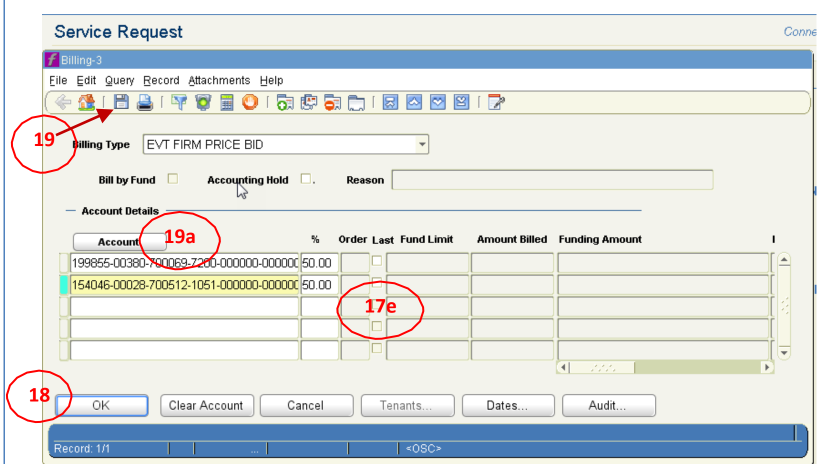
18. Click **OK**. This generates a Work Order number.

19. Click **Save** from the tool bar if the FOAPAL(s) are correct.

    a. If you make a mistake entering the FOAPAL(s), click **Account** to make the corrections and follow steps 13 to 16 above.

Tip

Use the **Clear Account** button Clear Account to clear a FOAPAL.



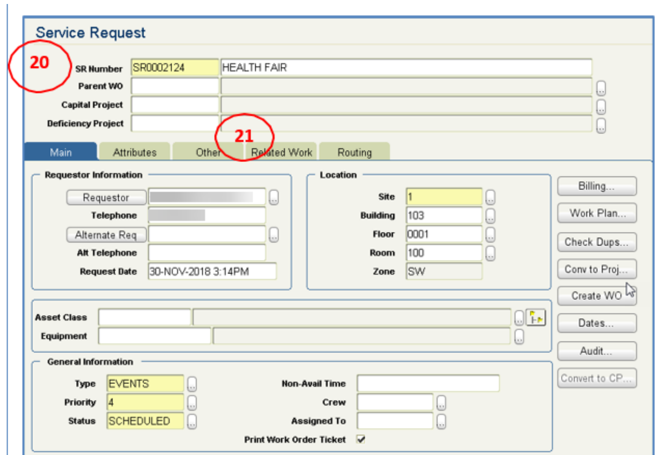
20. You are back at Service Request form where the **SR Number** for your request displays.

21. Click **Other** tab. This brings you to the screen where you can access your Work Order number.

Tip

Remember to occasionally save your service request and work request.

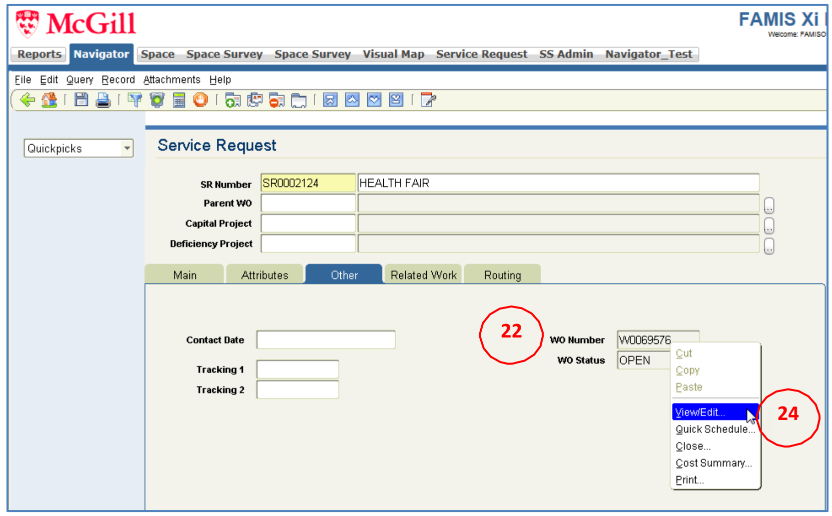
Take note of your Service Request number (**SR Number**) and Work Order number (**WO Number**).



Access Work Order from Service Request

22. From the Service Request screen, click in the **WO Number** field from the **Other** tab to select it.
23. Right-click on the **WO Number** field.
24. Click **View/Edit**

> **Note**
>
> Take note of your Work Order # (**WO#**).
>
> WO # is assigned because the **Status** of the Service Request = **Scheduled**



Work Order

25. The **Work Order** screen displays with the information entered in the service request.

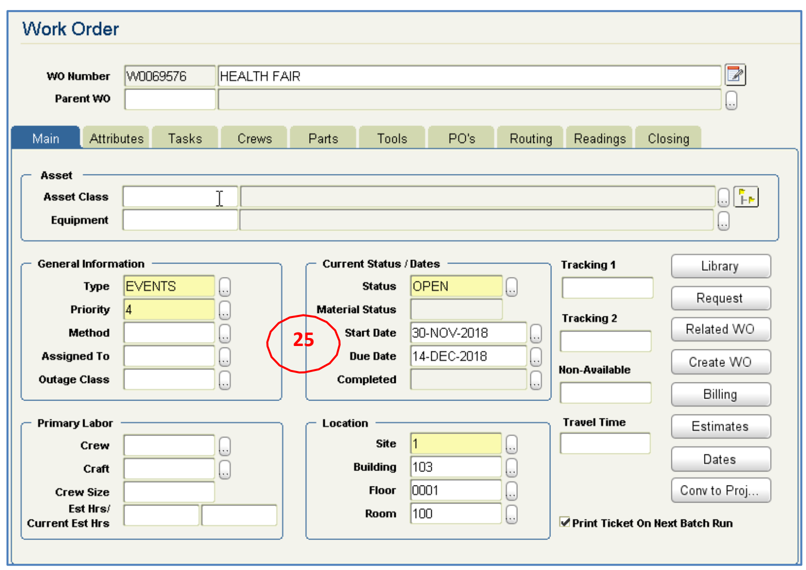
    From **Main** tab, in the **Current Status/Dates** section, enter:

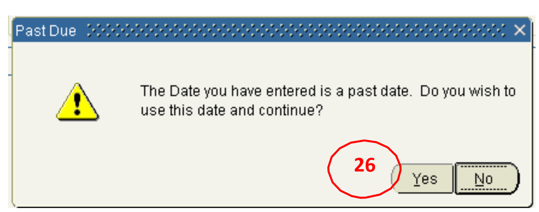
    a. **Start Date**

    b. **Due Date**

26. If the date entered is a past date, you will see a Past Due message.

    a. Click **Yes**.



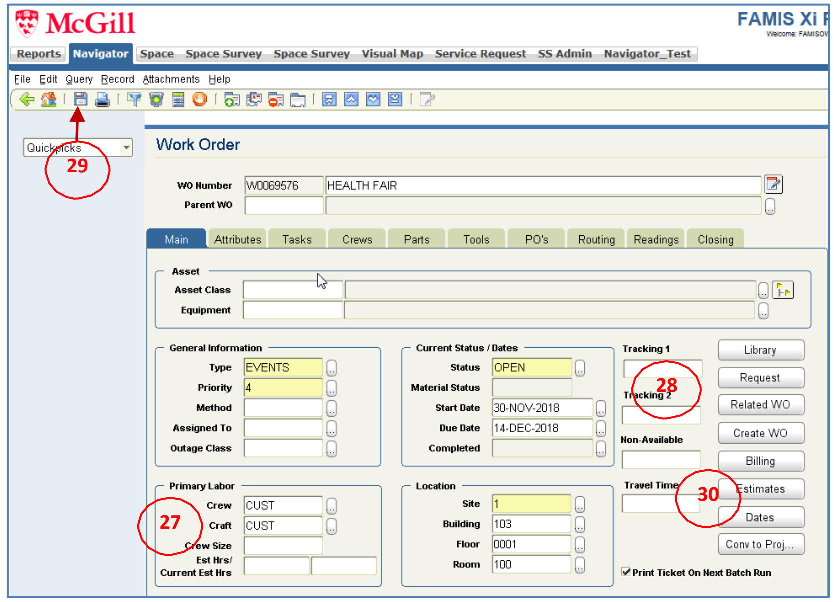


27. In the **Primary Labor** section, enter (or click) to enter the right value for **Crew** and **Craft** to ensure that it goes to the proper fund recovery fund:
   a. **Crew**
   b. **Craft**

The recovery fund for each value is as follows:

CUST	(custodial ops)	→ fund 163900
EVENT SUPP	(events support)	→ fund 163400
GROUNDS	(groundsmen)	→ fund 162000
BLDSER	(building services)	→ fund 163000

28. Use fields **Tracking 1** and **Tracking 2** to enter additional reference numbers.
   Note: there is a limit of 10 characters.
   (E.g. Banner booking conference #, Work Order # from Hospitality Services).



29. Click **Save** .

30. Click **Estimates**.

Note

If you have more than one crew, first create the parent work order with the first crew. Only enter the estimate for this crew.

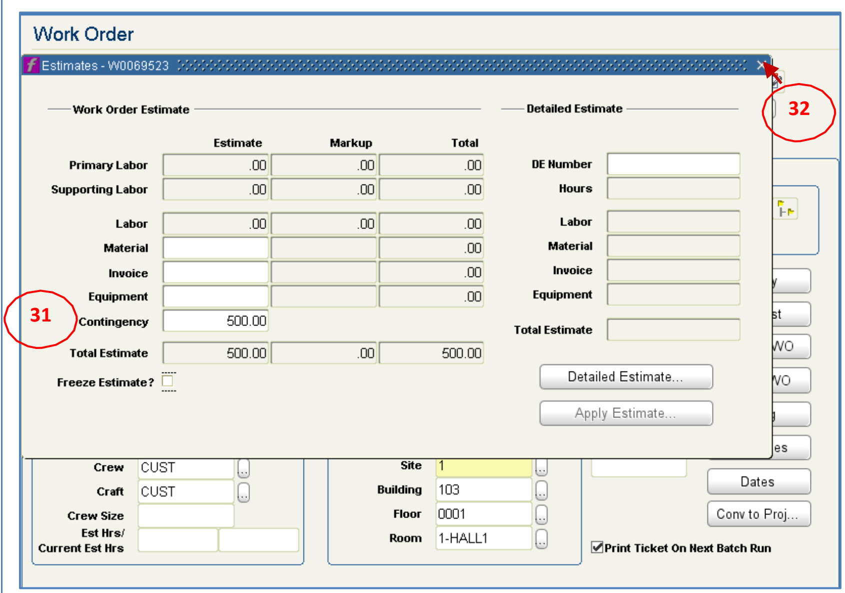
You will then have to create a child work order for the other crew(s).

31. In the **Contingency** field of the Estimates screen, enter the total estimate for this crew and press Tab. This will update the **Total Estimate** field.

32. Close the **Estimates** screen by clicking on the **X**.

Tip

Remember to occasionally **save** your work request by clicking on the **Save** icon from the toolbar. See step 29 above.



33. Click **Tasks** tab.

34. Copy and paste details from the email or request into the **Task List** field. This is free-form text (e.g. information as what to do during and after shifts; additional information)

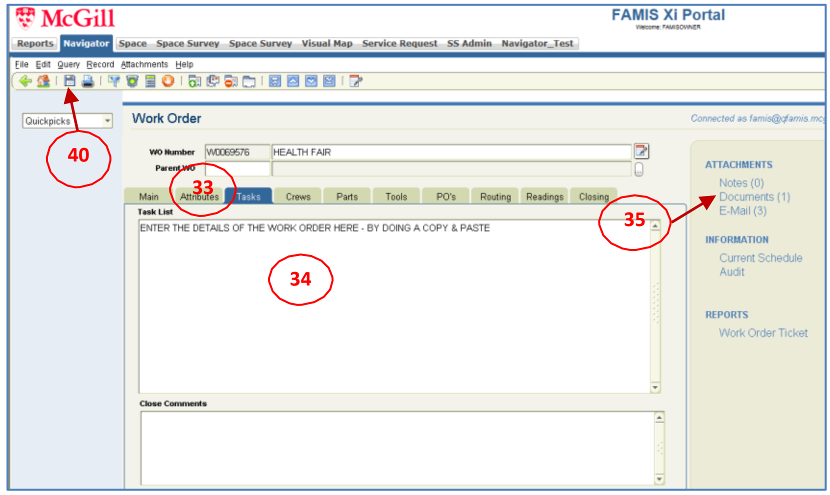
35. To attach a related document (e.g. email) to the work order, click **Documents** from the right.
Click OK if you get an error message.

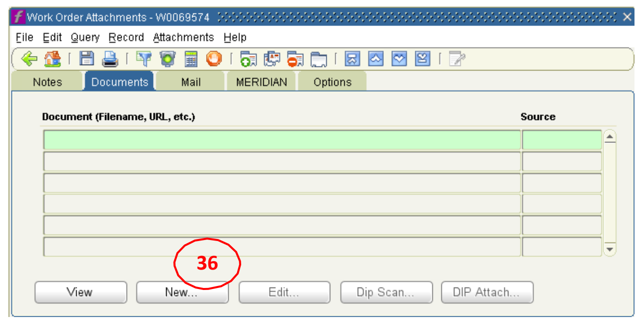
36. Click **New** from the **Work Order Attachments** screen.

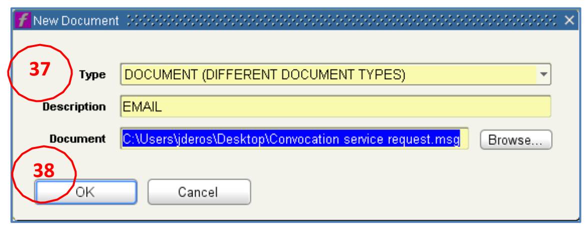
37. From the **New Document** screen, select:
    a. **Type** : DOCUMENT (DIFFERENT DOCUMENT TYPES)
    b. **Description**: enter a description (e.g. EMAIL)
    c. **Document** – click **Browse** to select the document (file)

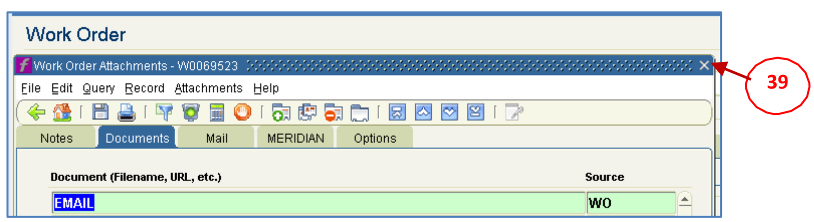
38. Click **OK**.

> **Note**
>
> Before you select the file, access it and save it as one of these allowed file types by using **File > Save As**:
> - pdf
> - doc (Word)
> - docx (Word)
> - xlxs (Word)
> - xls (Word)
> - txt
> - msg (email)
> - dwf (Autocad)
> - dwg (Autocad)
>
> Ensure that the file name is no longer than 30 characters, with no spaces.









39. You will return to the Work Order Attachments screen with the document you attached indicated. Close the **Work Order Attachments** screen by clicking on the **X**.

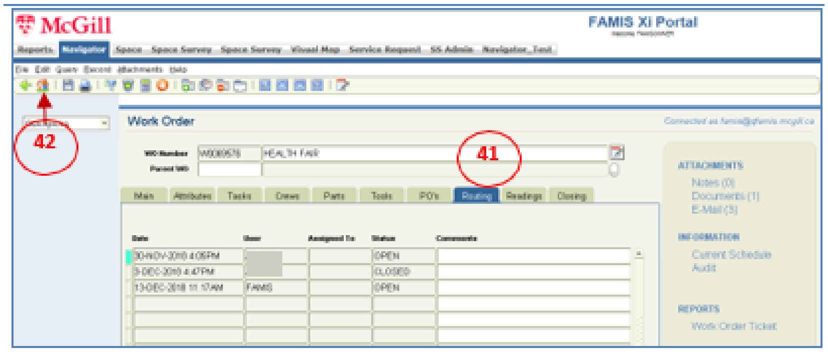
40. You will return to the Work Order screen. Click the **Save** icon from the toolbar.

> **Note**
>
> Take note of the Work Order number.

41. To see a summary of the actions performed in the Work Order, click on the **Routing** tab.

    This shows the user(s) that performed the action on the work order, and the date and time that this was performed.

42. If you are using additional crew(s), create a child work order for each crew. This is explained in the Create a Child Work Order section.
43. Click the **Home** icon .



Note

The next steps are performed in KRONOS:

- Create assignments
- Do the Overtime Payroll

Once you are done with the KRONOS steps, close the work order by following the steps below.

Close the Work Order

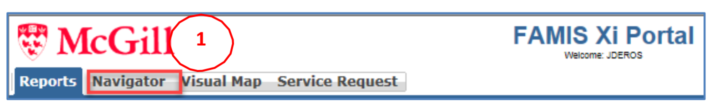
After the event is completed, the Work Order(s) have to be closed. If you have parent and child work orders, you will need to close each work order. This will allow the client to be billed.

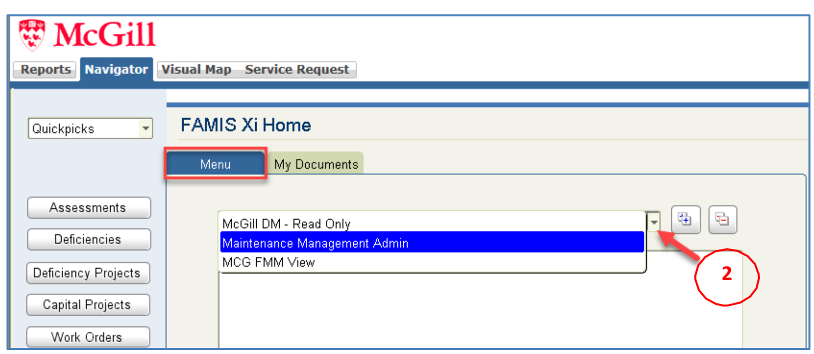
If you know your Work Order number, follow the next steps. If you do not know the number, go to the Find the Work Order section.

Note

If any changes are required to the estimate in the work order, return to the work order, make the change and save. Changes are allowed until the work order has been billed.

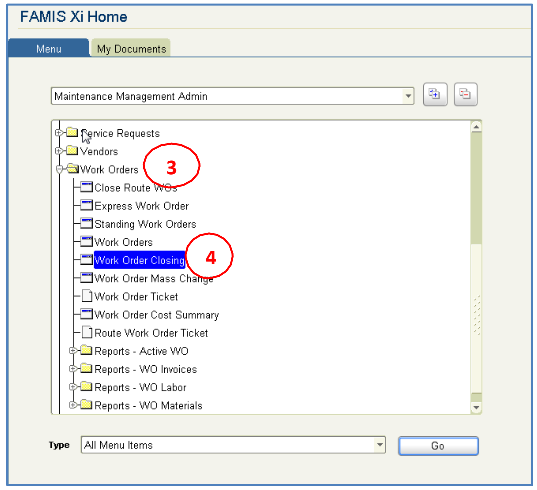
1. Click the **Navigator** tab at the top
2. From the Menu tab, click on the down-arrow and select **Maintenance Management Admin**.





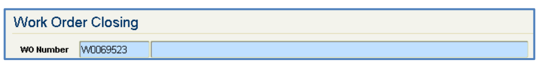
3. Folders display. Double-click **Work Orders**

4. Double-click **Work Order Closing**. The Work Order Closing screen displays.

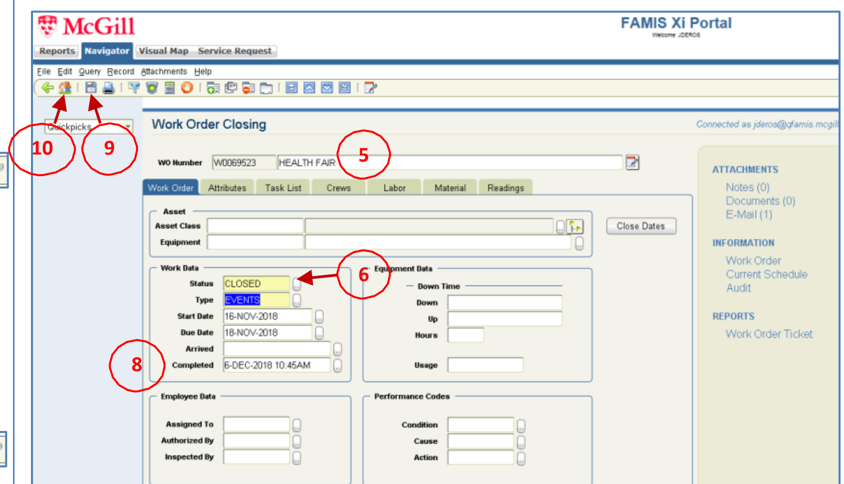


5. To enter the Work Order number in the **WO Number** field.
   a. Press **F7** or click on icon from toolbar. *(fields will turn blue)*

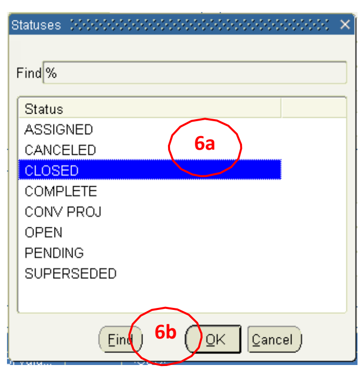
   b. Enter Work Order Number in the **WO Number** field.



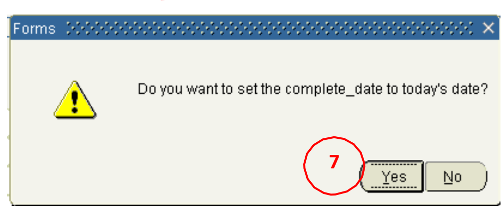
   c. Press **F8** or click on icon from toolbar.



6. The Work order displays. Change the **Status** from OPEN to CLOSED. To change the Status:
   a. Click to select **CLOSED**
   b. Click **OK**.



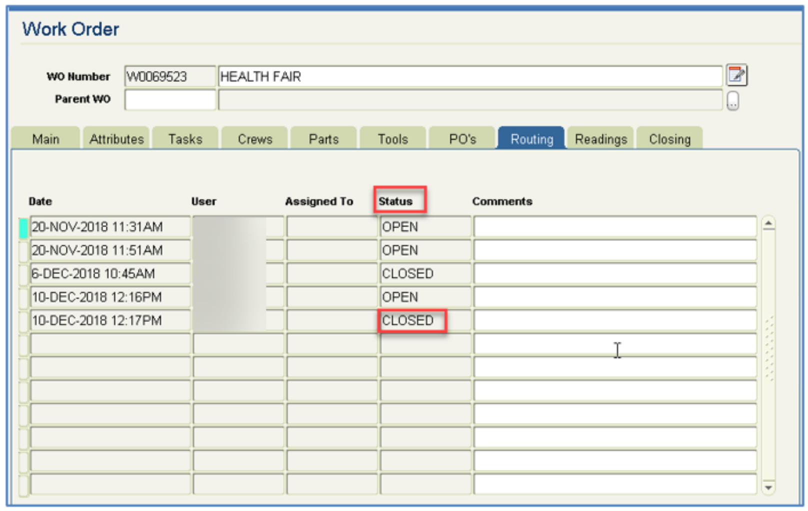
7. If the message displays to set the complete date to today's date, click '**Yes**'.



8. The **Completed** date displays.

9. Click the **Save** icon from the toolbar.

10. Click the **Home** icon from the toolbar.

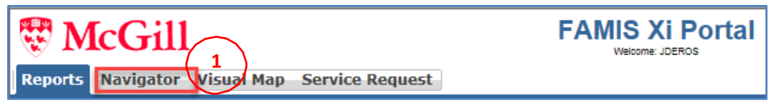
Note Once the work order is closed, the billing will automatically be run by Accounting. Go to the [Ensure that the work order is billed] section to ensure billing took place. You can modify the amount of the work order until it is billed.	
Note Once the Work Order is closed, the **Routing** tab of the Work Order will indicate that the Status of the Work Order is '**Closed**'.	

Create a IDC Request (EVT IDC FIRM PRICE)

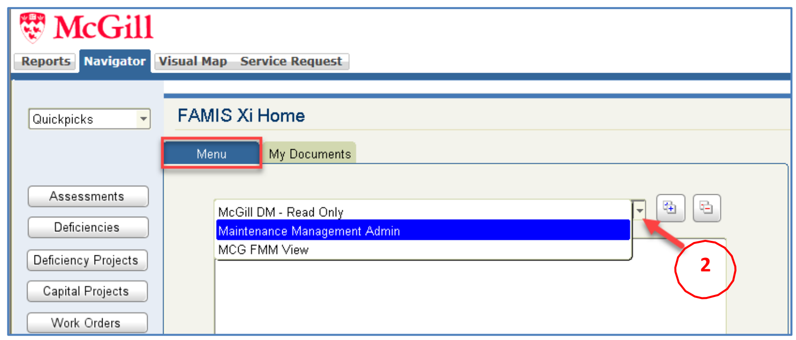
IDC's are inter-departmental charges to charge a department (internal client) for extra work that is performed. The Records clerk will create the work order after the work is completed.

Create a Service Request

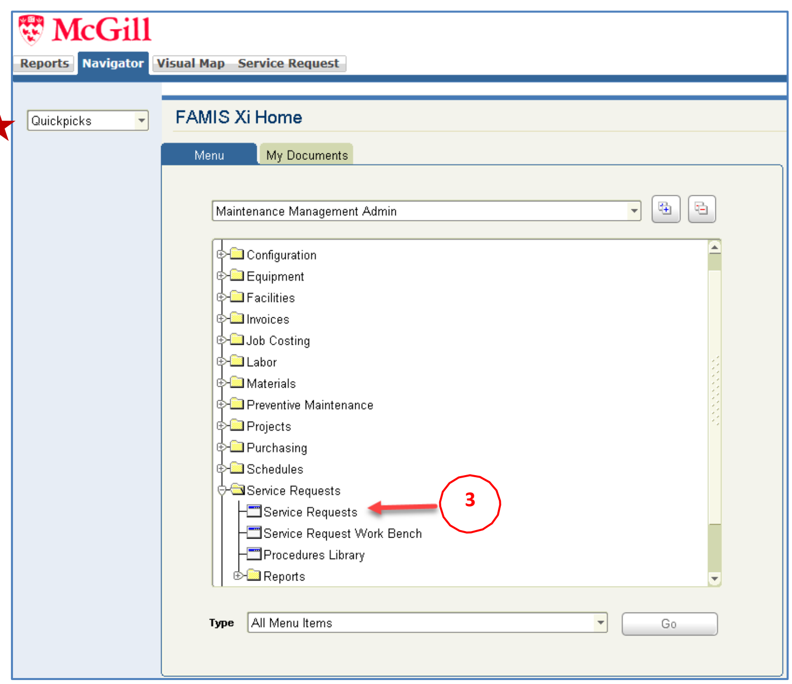
1. Click the **Navigator** tab at the top



2. From the Menu tab, click on the down-arrow and select **Maintenance Management Admin**.



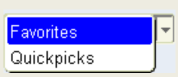
3. Folders display. Click the **+** next to **Service Requests** (or double-click) and double-click **Service Requests**.



Tip

If you have set up Service Requests as a favorite:

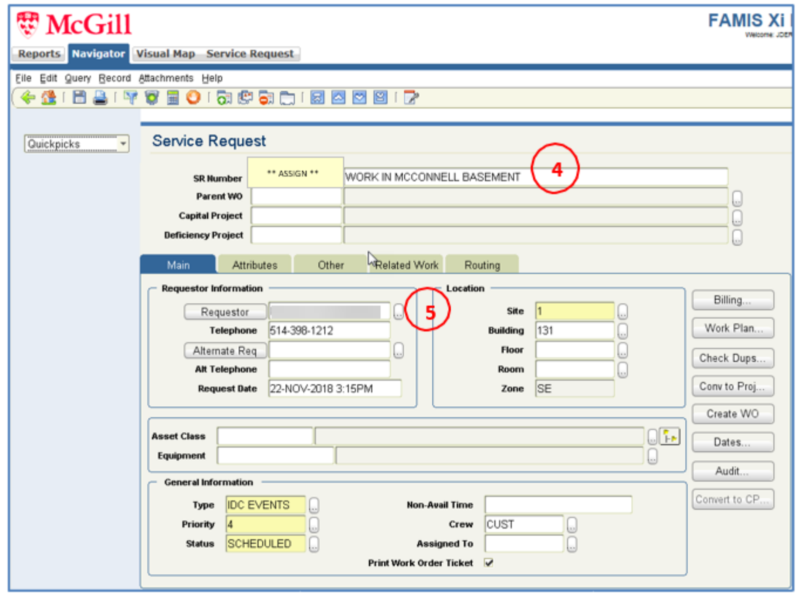
- Click on the down-arrow next to Quickpicks ★
- Select **Favorites**



- The favorites that are already set up display
- Select **Service Requests**

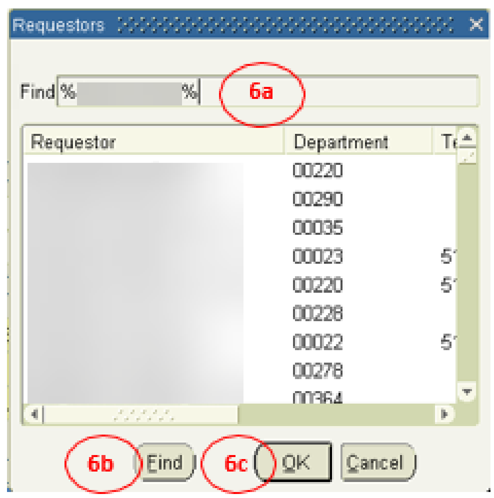
Refer to Set up your favorites section for details on setting up favorites.

4. The Service Request form displays. Click in the description field next to **SR Number** field. Type a description. The service request number field indicates **ASSIGN**



5. From the **Main** tab, click next to the **Requestor** field.

6. The **Requestors** window displays. In the **Find** field:

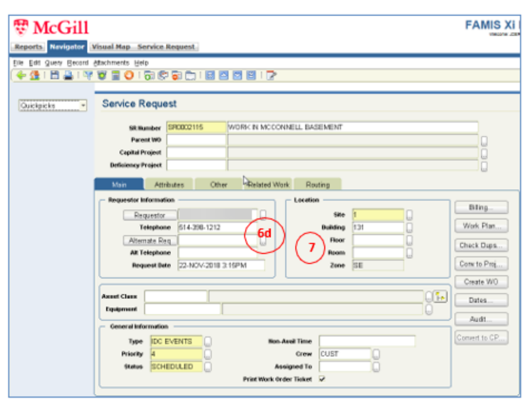


   a. Enter client's last name, surrounded by %.
   You can type the name in upper-case or lowercase characters.

   b. Click **Find**.

   c. If more than one person has the same name, select the client's name. Click **OK**.

   d. If only one person with that name exists, the person's name displays in Requestor field.
      - Client telephone and Request Date display.
      - You may enter/update the telephone.



Note

It's a good idea to first ensure that the client exists before creating the service request. See [Ensure client exists] for details.

New clients will have to be created by staff with administrative privileges. Contact your Administrator.

7. Enter the **Location** information. Enter the fields or click to search for the fields.
   a. **Site**: enter '1' for Downtown campus or
      '2' for Macdonald campus

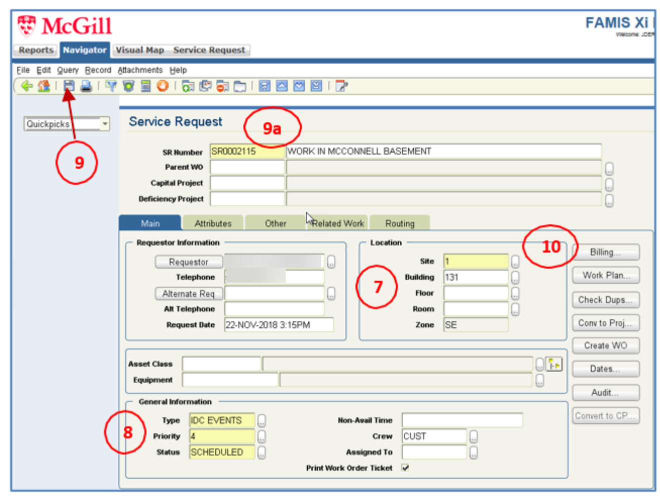
   b. **Building**: enter building code or name. Press Tab. If you click on, find and select the building and click **OK**.

   c. **Floor**: enter the floor code or click on to select the floor and click **OK**.

   d. **Room**: enter the room code or click on to select the floor and click **OK**.

> **Note**
>
> **Site** is the only required field. If there are multiple buildings, floor or rooms, leave the field(s) blank.
>
> The **Zone** field is automatically entered.

8. Enter the **General Information** section.
   For <u>each</u> field (**Type**, **Priority**, **Status**):



Type:

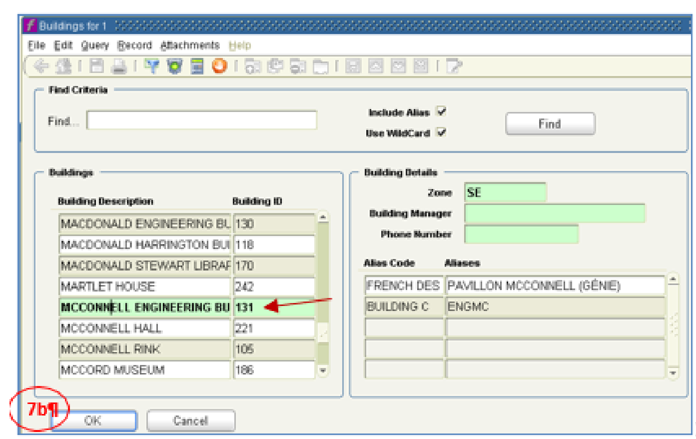
a. Click next to the Type field.
b. Select: **IDC EVENTS**
c. Click **OK**

Priority: :

a. Click next to the Priority field.
b. Select a value *(see below for values)*:
   '**1**' for EMERGENCY
   '**4**' for REGULAR
c. Click **OK**

Status:

a. Click next to the Status field.
b. Select '**SCHEDULED**' *(this triggers a work order)*
c. Click **OK**



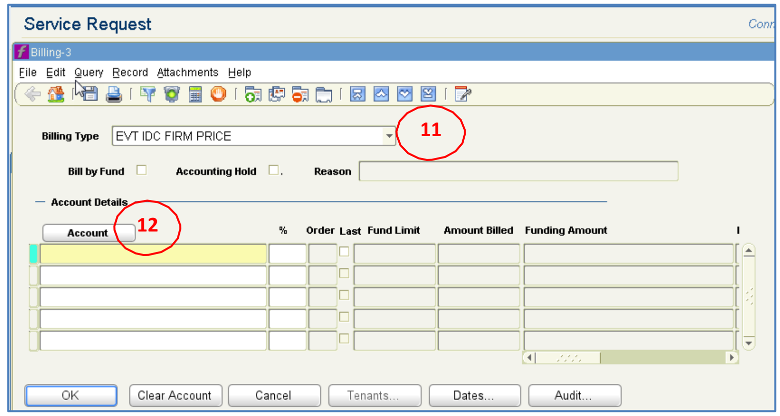
9. Click **Save** from the Navigator tool bar.
   a. **SR Number** for your request is now created.

10. Click **Billing** from the right.

11. The **Billing-3** screen displays. Click the down-arrow to select the appropriate billing type. Refer to the Glossary for the definition.

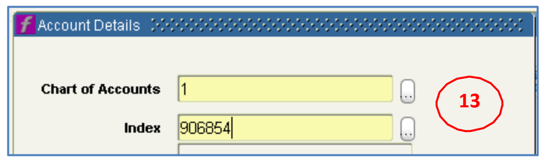
    Billing Type = EVT IDC FIRM PRICE

12. Click **Account**.



13. The **Account Details** screen displays. Enter the FOAPAL(s) to be charged for internal clients. Enter these fields or click to search:
    a. **Chart of Accounts**:
       '**1**' for internal clients
       '**EXT**' for external clients (e.g. student associations)

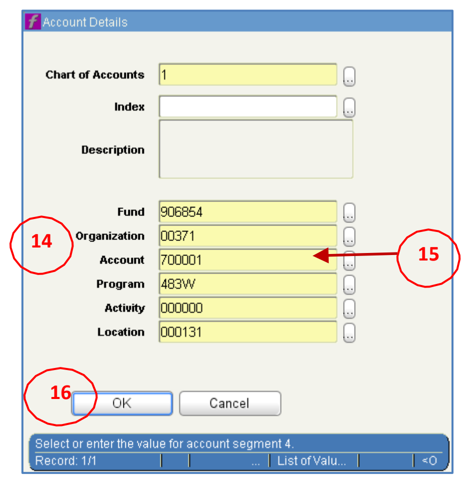
    b. **Index**:
       enter or select the fund



14. Press **Tab**. Most of the FOAPAL fields will be automatically filled. The **Description** field will enter a description for the fund.

15. Enter the **Account** for the service being requested. *Contact the Administrator if you do not know what account to enter.*

16. Click **OK**. *It will only be saved if FOAPAL exists.*



Note

Note: if your **F**und/**O**rganization/**P**rogram do not display, this means that either:

a. FOAPAL is invalid
b. FOAPAL was created today and you will need to wait until tomorrow to enter it. Take note of the **Work Order #**. If it is still not valid the next day, contact the client to inform them that the FOAPAL provided by them is not valid.

17. The **Billing-3** screen displays with the FOAPAL you entered. If there is more than one FOAPAL *(this occurs when clients are sharing costs):*

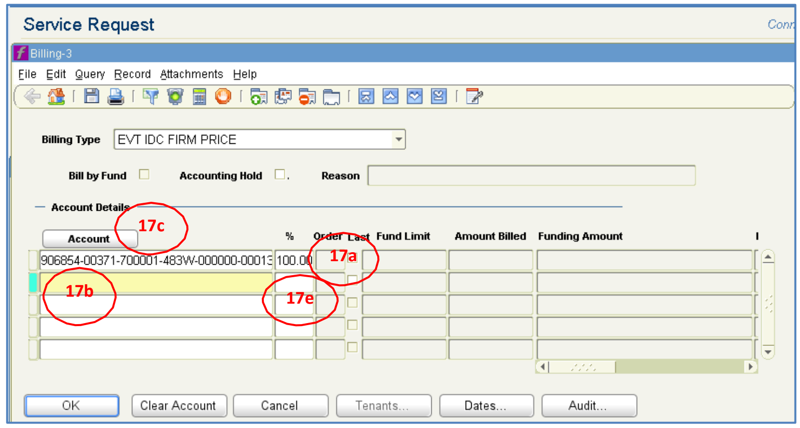
    a. Enter % for the first FOAPAL entry

    b. Click on the next empty FOAPAL record *(displays as a green indicator)*

    c. Click **Account** to enter the second FOAPAL

    d. Follow steps 13 to 16 above.

    e. Enter % for the second FOAPAL entry.



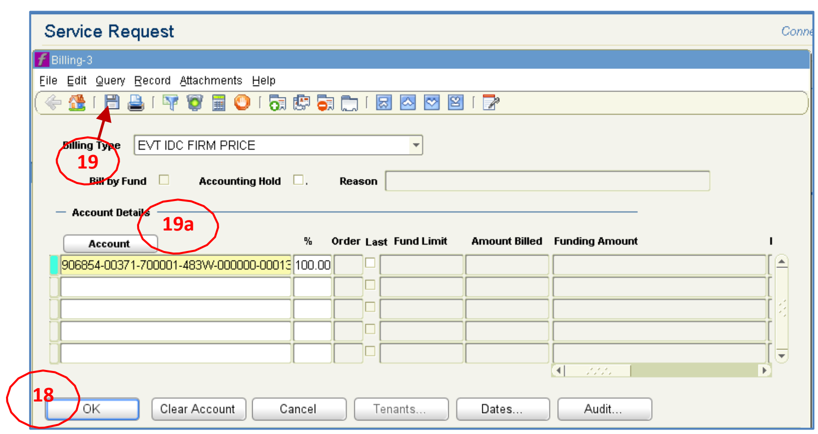
Note

- Enter more than one FOAPAL when clients are sharing costs.
- Ensure that the % add up to 100%.
- If you only have 1 FOAPAL, you do not have to enter the % field.
- The screenshot is only using 1 FOAPAL.

18. Click **OK**. This generates a Work Order number.

19. Click **Save** from the tool bar if the FOAPAL(s) are correct.

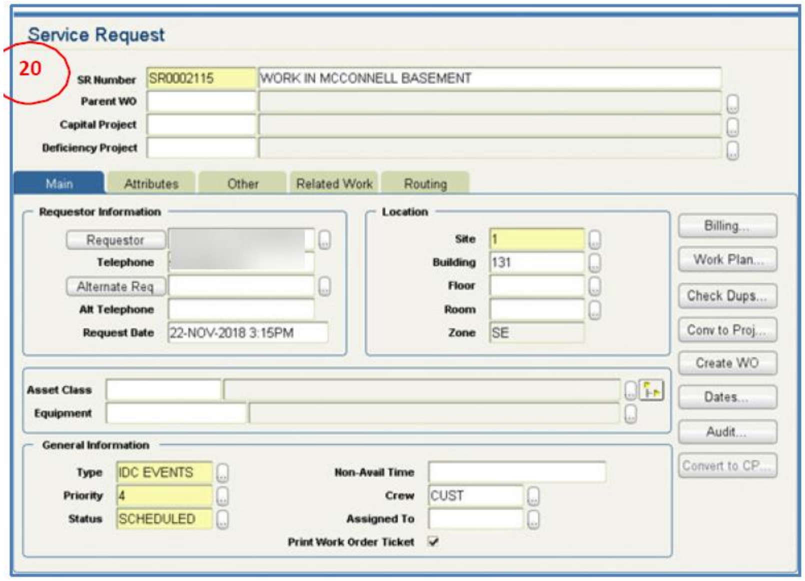
    a. If you make a mistake entering FOAPAL(s), click **Account** to make corrections and follow steps 13 to 16 above.



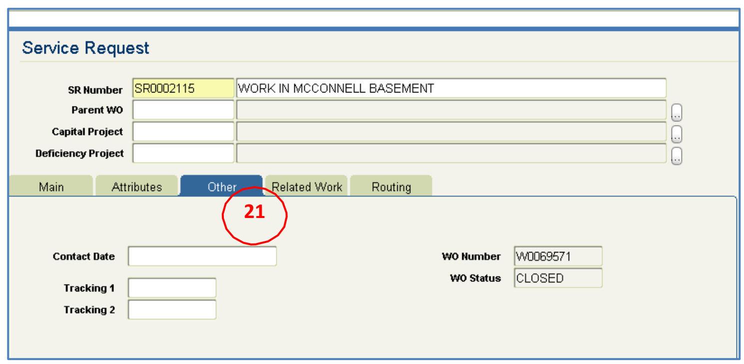
Tip

Use the **Clear Account** button Clear Account to clear a FOAPAL.

20. You are back at Service Request form where the **SR Number** for your request displays.



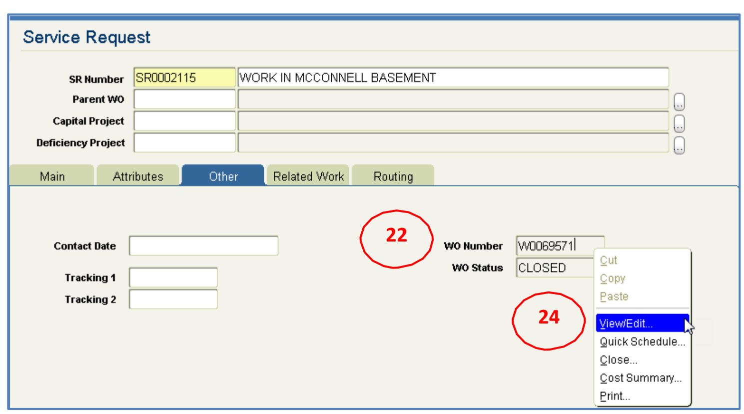
21. Click **Other** tab. This brings you to the screen where you can access your Work Order number.



Tip	Remember to occasionally save your service request and work request. Take note of your Service Request number (**SR#**) and your Work Order number (**WO#**).

Access Work Order from Service Request

22. From the Service Request screen, click in the **WO Number** field from the **Other** tab to select it.
23. Right-click on the **WO Number** field.
24. Click **View/Edit**

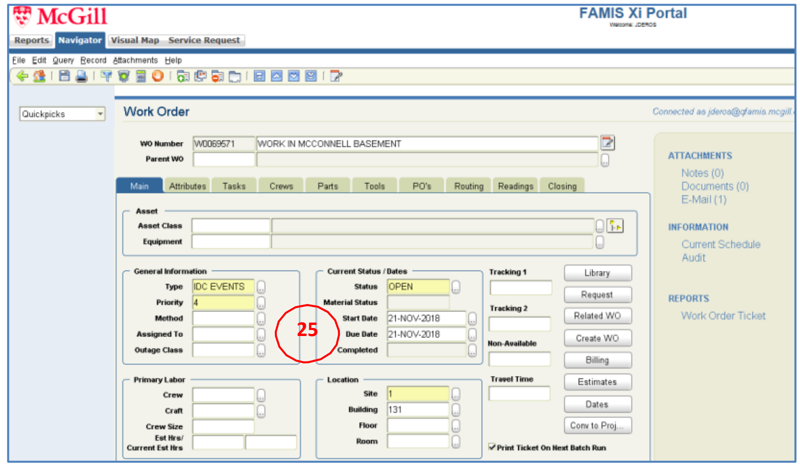


Note	Take note of your Work Order #. WO # is assigned because the Status of Service Request = Scheduled

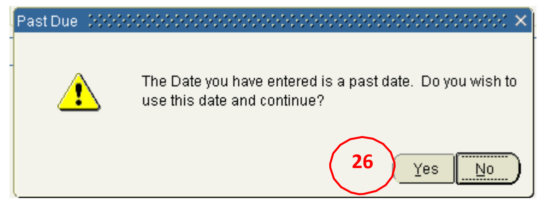
Work Order

25. The Work Order screen displays with the information entered in the Service Request.

    From **Main** tab, in the **Current Status/Dates** section, enter:
    a. **Start Date**
    b. **Due Date**

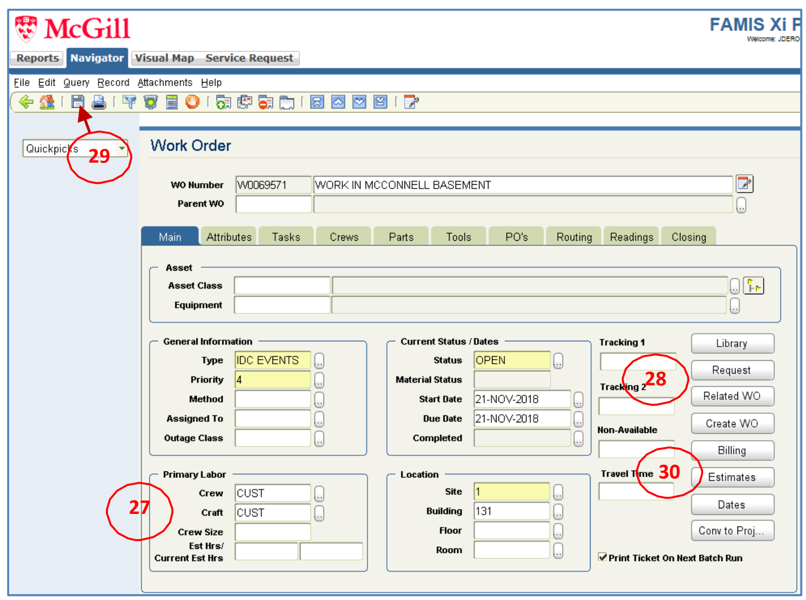


26. If the date entered is a past date, you will see a Past Due message.
    a. Click **Yes**.



Note	Take note of the Work Order number.

27. In the Primary Labor section, enter (or click) to enter the right value for **Crew** and **Craft** to ensure that it goes to the proper fund recovery fund:
    a. **Crew**
    b. **Craft**



The recovery fund for each value is as follows:

CUST	(custodial ops)	→ fund 163900
EVENT SUPP	(events support)	→ fund 163400
GROUNDS	(groundsmen)	→ fund 162000
BLDSER	(building services)	→ fund 163000

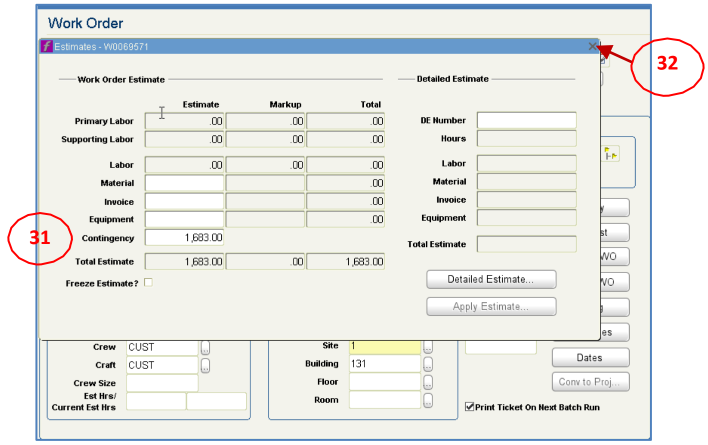
28. Use fields **Tracking 1** and **Tracking 2** to enter additional reference numbers.
    Note: there is a limit of 10 characters.
    (e.g. Banner booking conference #, Work Order # from Hospitality Services).

29. Click the **Save** icon on the toolbar.

30. Click **Estimates**.

31. In the **Contingency** field of the Estimates screen, enter the total estimate and press Tab. This will update the **Total Estimate** field.

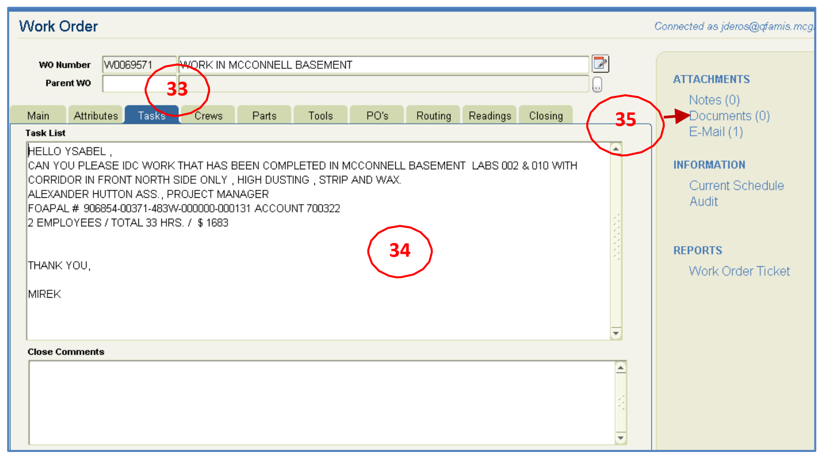
32. Close the **Estimates** screen by clicking on the **X**.



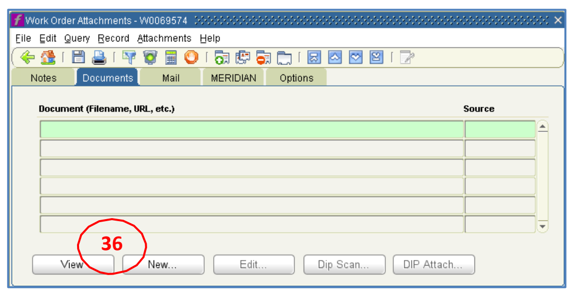
Tip

Remember to occasionally **save** your work request by clicking on the **Save** icon from the tool bar.
See step 29 above.

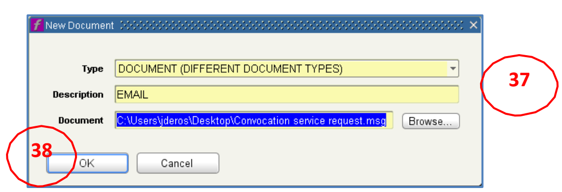
33. Click **Tasks** tab.
34. Copy and paste details from the email or request into the **Task List** field.
35. To attach a related document to the work order:
    a. Click **Documents** from the right



36. Click **New** from **Work Order Attachments** screen.

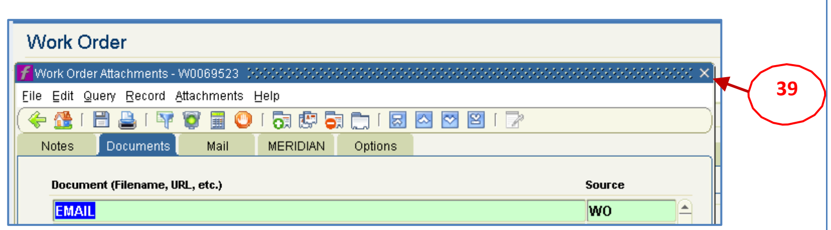


37. From the New Document screen, select:
    a. **Type** : DOCUMENT (DIFFERENT DOCUMENT TYPES)
    b. **Description :** enter a description
    c. **Document :** click **Browse** to select the file



38. Click **OK** to return to the Work Order Attachments screen.

39. Close the **Work Order Attachments** screen by clicking on the **X**.



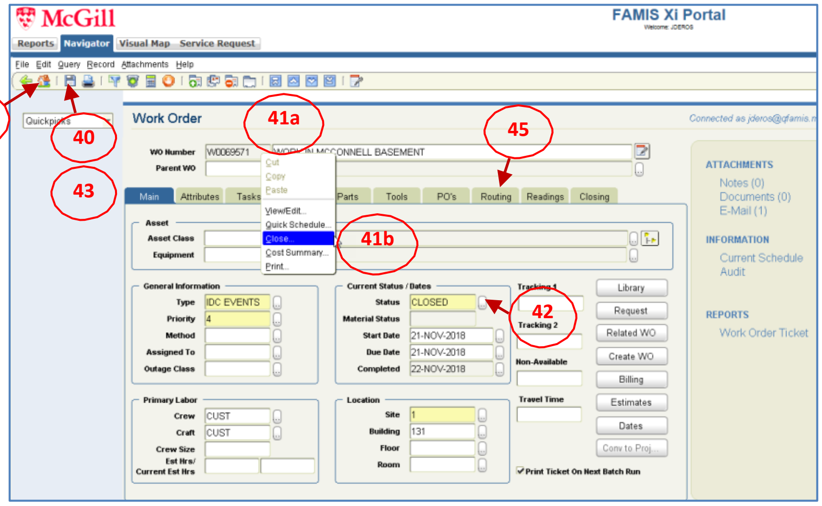
Note

Before you select the file, access it and save it as one of these allowed file types by using **File > Save As**:

- pdf
- doc (Word)
- docx (Word)
- xlxs (Word)
- xls (Word)
- txt (text)
- msg (email)
- dwf (Autocad)
- dwg (Autocad)

Ensure that the file name is no longer than 30 characters, with no spaces.

40. You will return to the Work Order screen. Click the **Save** icon



Close the Work Order

41. Go back to the **Main** tab and close the work order:
    a. Right-click on the WO Number field
    b. Click **Close.**

42. Change the **Status** from OPEN to CLOSED. To change the Status:
    a. Click to select **CLOSED**
    b. Click **OK**.

43. Click the **Save** icon.

44. Click the **Home** icon.

Note

Once the work order is closed, the billing will automatically be run by Accounting.

Go to the Ensure that the work order is billed section to ensure billing took place. You can modify the amount of the work order until it is billed.

Tip

To see a summary of the actions performed in the Work Order, click on the **Routing** tab. 45

*This shows the user(s) that performed the action on the work order, and the date and time that this was performed. When the Work order is closed, It will also show that the Status is now '**Closed'**.*

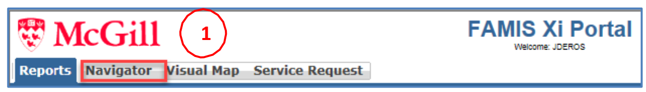
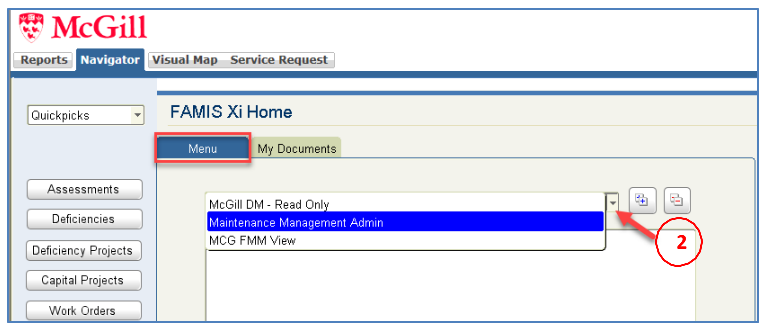
EVENT BILLABLE (EVT BILLABLE)

When the Event Support Team receives a service request for a progressive standing order via email, they use FAMIS to create the service request and the work order. Use the billing type **EVT BILLABLE** to process the progressive standing orders. These are work orders that remain open, but every month the charges are entered and then billed to the client.

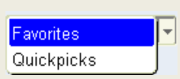
Before you start creating the service request, ensure that the client already exists in the system. See the section Ensure client exists for details on how to do this.

For work orders that involve different crews or units (e.g. custodial event support, rental), you will have to create work orders with a parent-child relationship. Create the parent work order following steps below. Then, create one or more child work orders. This is explained in the Create a Child Work Order section.

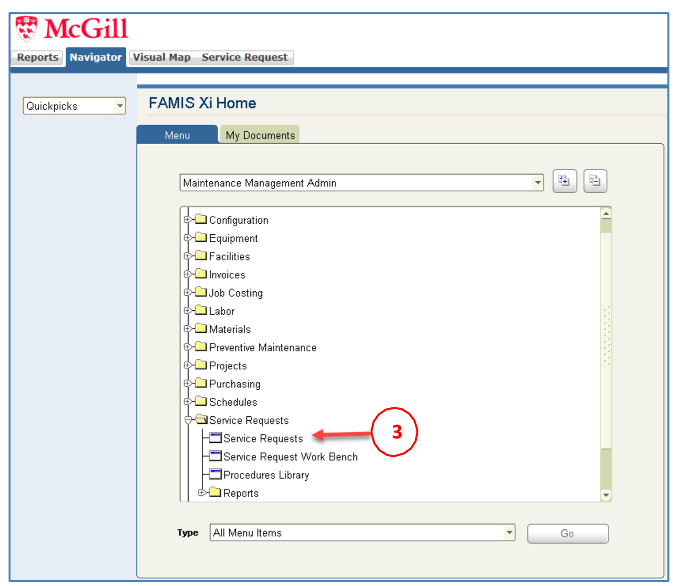
Create a Service Request

<table>
<tr><td>1. Click the Navigator tab at the top</td><td>
</td></tr>
<tr><td>2. From the Menu tab, click on the down-arrow and select Maintenance Management Admin.</td><td>
</td></tr>
<tr><td>3. Folders display. Click the + next to Service Requests (or double-click) and double-click Service Requests.

Tip
If you have set up Service Requests as a favorite:

Click on the down-arrow next to Quickpicks ★


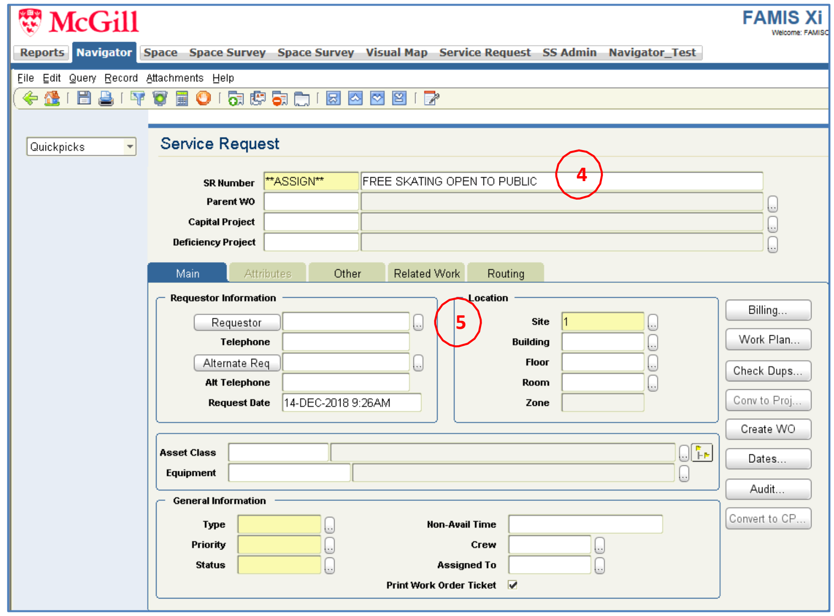
Select Favorites
The favorites that are already set up display
Select Service Request

Refer to Set up your favorites section for details on setting up favorites.</td><td>★

</td></tr>
</table>

4. The Service Request form displays. Click in the description field next to **SR Number** field. Type the event description.

5. From the **Main** tab, click next to the **Requestor** field.

> **Note**
>
> It's a good idea to first ensure that the client exists before creating the service request. See [Ensure client exists](#) for details. New clients will have to be created by staff with administrative privileges. Contact your administrator.



6. The **Requestors** window displays. In the **Find** field:

   a. Enter client's last name, surrounded by %. *You can type the name in upper-case or lowercase characters.*

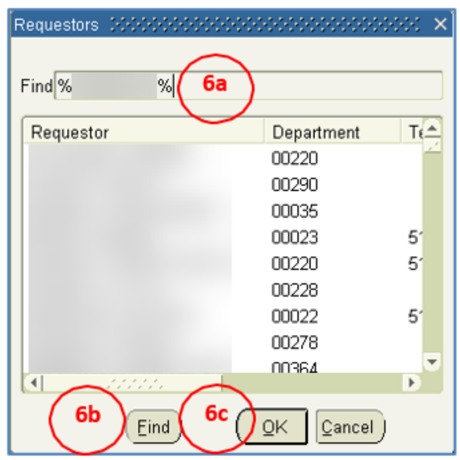
   b. Click **Find**.

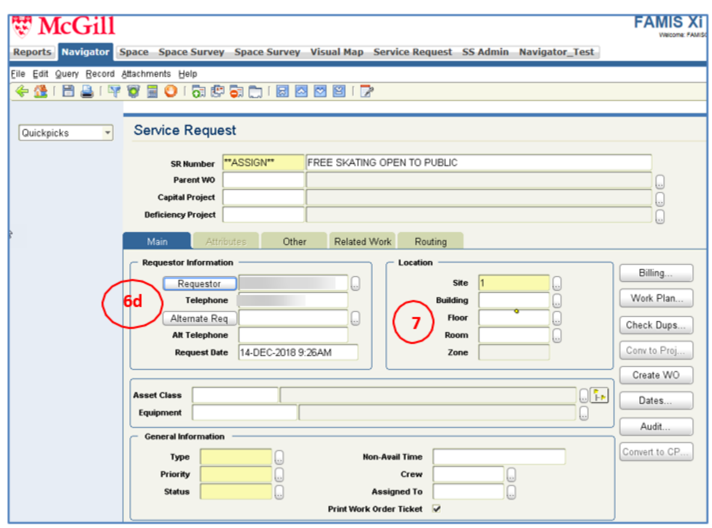
   c. If more than one person has the same name, select the client's name. Click **OK**.

   d. If only one person with that name exists, the person's name displays in Requestor field.

      a. Client Telephone and Request Date display.

      b. You may enter/update the telephone.



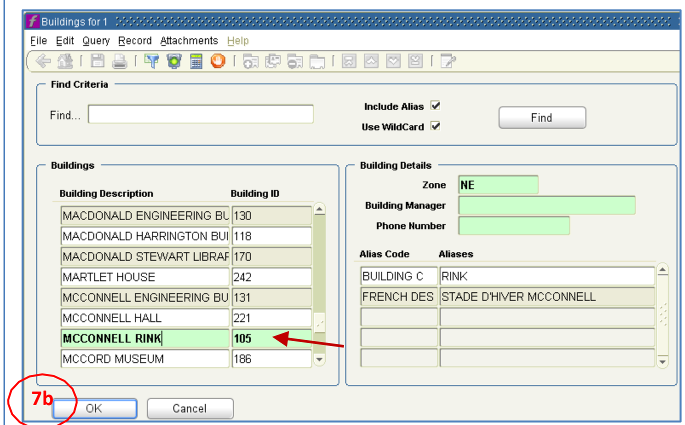


7. Enter the **Location** information. Enter the fields or click ⃞ to search for the fields.
    a. **Site**: enter '1' for Downtown campus or
    '2' for Macdonald campus
    b. **Building**: enter building code or name. Press Tab. If you click on ⃞, find and select the building and click **OK**.
    c. **Floor**: enter the floor code or click on ⃞ to select the floor and click **OK**.
    d. **Room**: enter the room code or click on ⃞ to select the floor and click **OK**.

Note

Site is the only required field. If there are multiple buildings, floor or rooms, leave the field(s) blank.

The **Zone** field is automatically entered.



8. Enter the **General Information** section.
For <u>each</u> field (**Type**, **Priority**, **Status**):

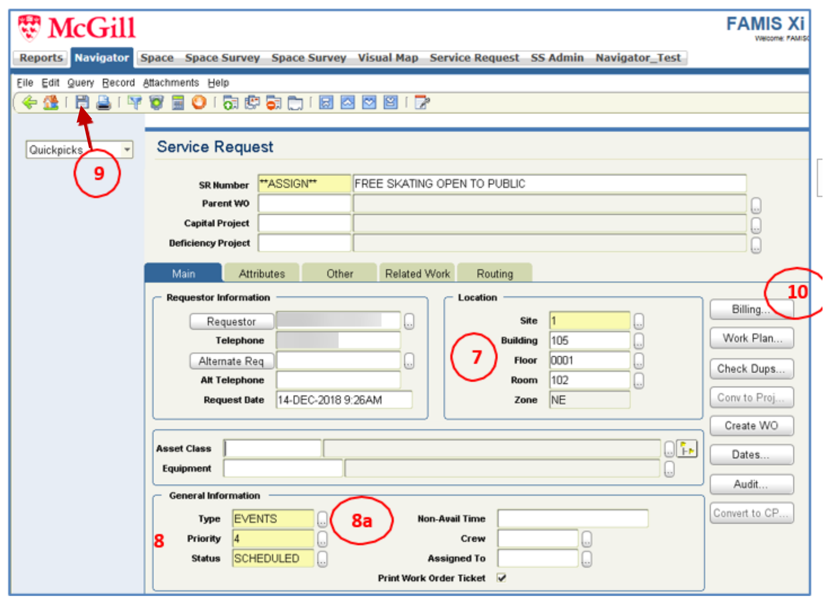
Type:
    a. Click ⃞ next to the Type field.
    b. Select a value: **EVENTS** or **REN EVENTS**
    EVENTS – for one or multiple teams
    REN EVENTS – events that require rentals
    c. Click **OK**

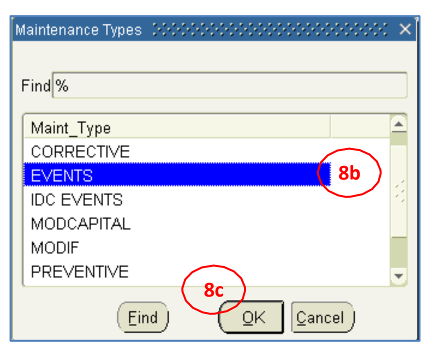
Priority: :
    a. Click ⃞ next to the Priority field.
    b. Select a value *(see below for values)*:
    '**1**' for EMERGENCY
    '**4**' for REGULAR
    c. Click **OK**

Status:
    a. Click ⃞ next to the Status field.
    b. Select '**SCHEDULED'** *(this triggers a work order)*
    c. Click **OK**

9. Click **Save** 🖫 from the Navigator tool bar.
    a. **SR Number** for your request is now created.

10. Click **Billing** from the right.

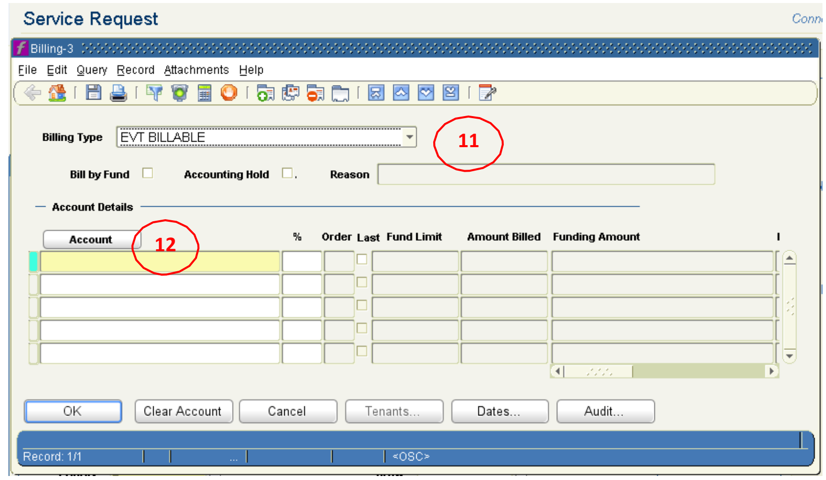




11. The **Billing-3** screen displays. Click the down-arrow to select the appropriate **Billing Type**. For a definition of this type, refer to the Glossary.

    a. **EVT BILLABLE** *(use for progressive standing orders)*

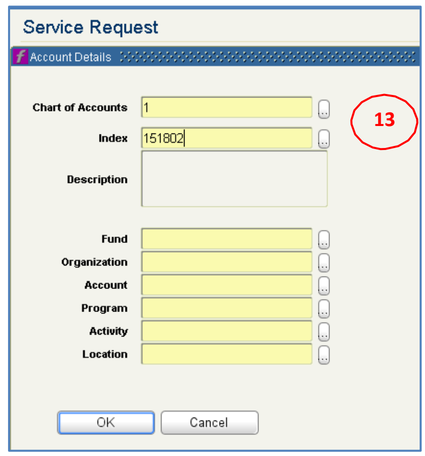
12. Click **Account**.



13. The **Account Details** screen displays. Enter the FOAPAL(s) to be charged for internal clients. Enter these fields or click to search:

    c. **Chart of Accounts**:
    '**1**' for internal clients
    '**EXT**' for external clients (e.g. student associations)

    d. **Index**:
    enter or select the fund

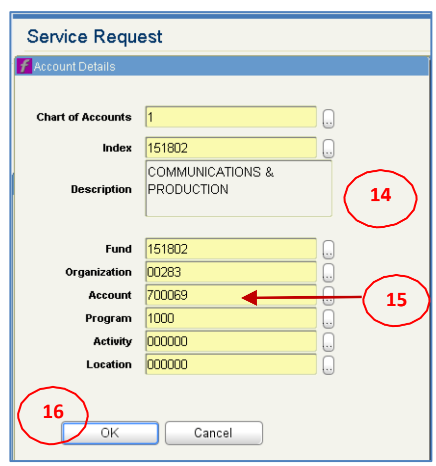


14. Press **Tab**. Most of the FOAPAL fields will be automatically filled. The **Description** field will enter a description for the fund.

15. Enter the appropriate **Account** for the service being requested. *Contact the Administrator if you do not know what account to enter.*

16. Click **OK**. *It will only be saved if FOAPAL exists.*

> **Note**
>
> **Note:** if your **F**und/**O**rganization/**P**rogram do not display, this means that either:
>
> a. FOAPAL is invalid
>
> b. FOAPAL was created today and you will need to wait until tomorrow to enter it. Take note of the **Work Order #**. If it is still not valid the next day, contact the client to inform them that the FOAPAL provided by them is not valid.

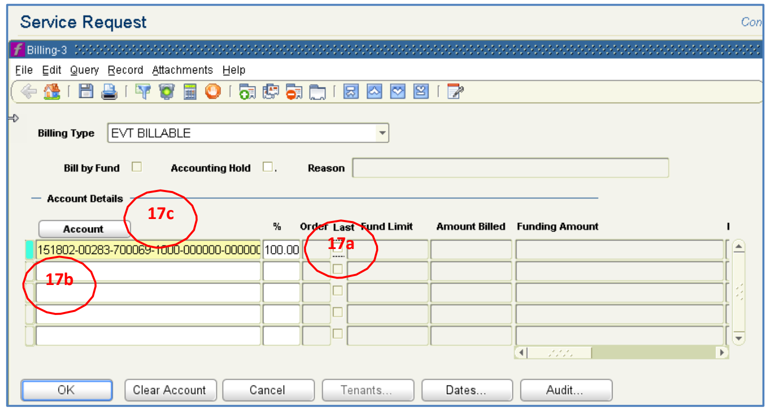


17. The **Billing-3** screen displays with the FOAPAL you entered. If there is more than one FOAPAL *(this occurs when clients are sharing costs):*

    a. Enter % for the first FOAPAL entry
    b. Click on the next empty FOAPAL record *(displays as a green indicator)*
    c. Click **Account** to enter the second FOAPAL
    d. Follow steps 13 to 16 above.
    e. Enter % for the second FOAPAL entry.

Note

- Enter more than one FOAPAL when clients are sharing costs.
- Ensure that the % add up to 100%.
- If you only have 1 FOAPAL, you do not have to enter the % field.
- In this screenshot there is only one FOAPAL.



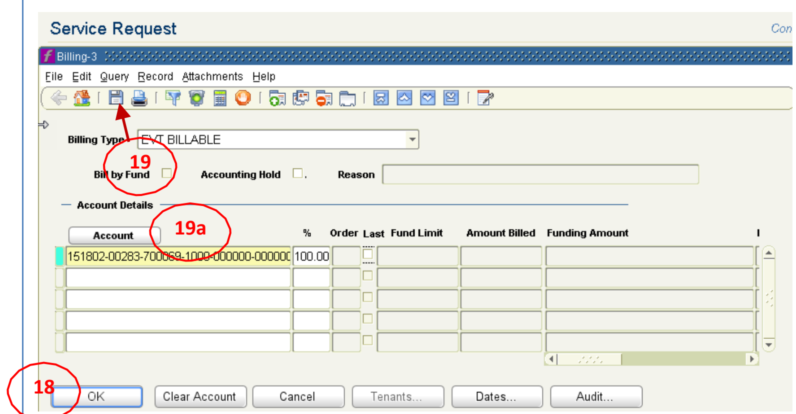
18. Click **OK**. This generates a Work Order number.

19. Click **Save** from the tool bar if the FOAPAL(s) are correct.

    a. If you make a mistake entering the FOAPAL(s), click **Account** to make the corrections and follow steps 13 to 16 above.

Tip

Use the **Clear Account** button Clear Account to clear a FOAPAL.



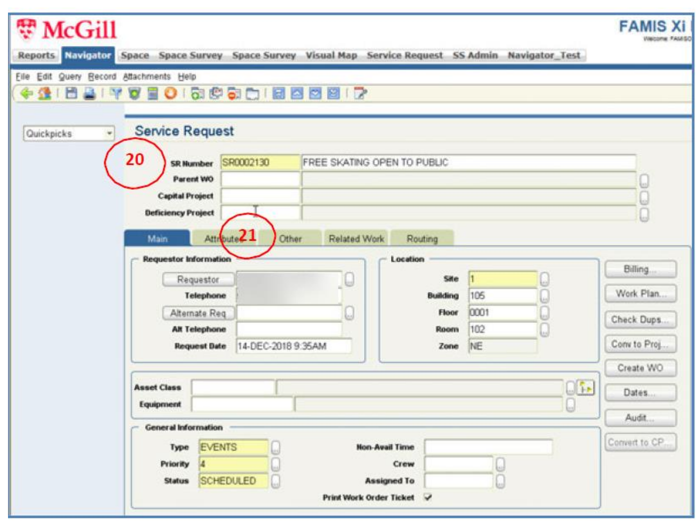
20. You are back at Service Request form. The **SR Number** for your request displays.

21. Click **Other** tab. This brings you to the screen where you can access your Work Order number.

Tip

Remember to occasionally save your service request and work request.

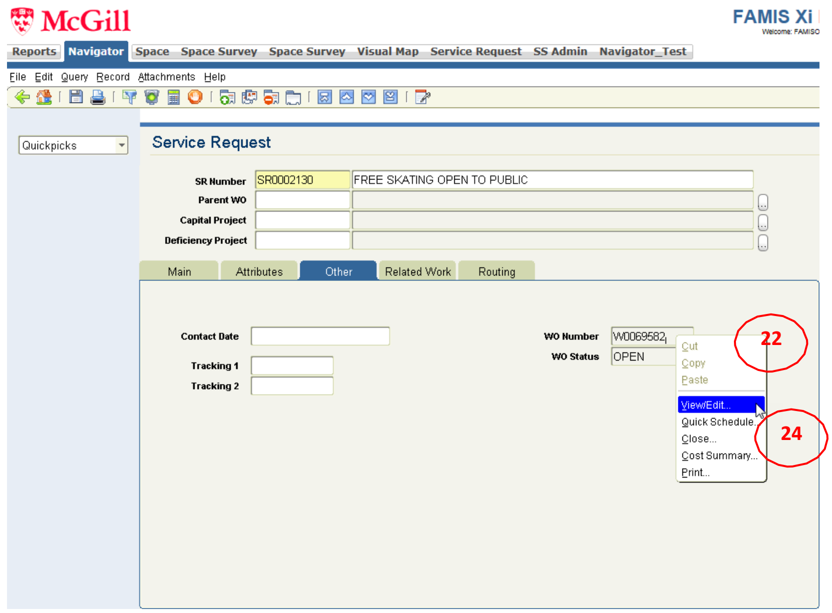
Take note of your Service Request number (**SR#**) and your Work Order number (**WO#**).



Access Work Order from Service Request

22. From the Service Request screen, click in the **WO Number** field from the **Other** tab.
23. Right-click on the **WO Number** field.
24. Click **View/Edit**

> **Note**
>
> WO # is assigned because the **Status** of the Service Request = **Scheduled**



Work Order

25. The Work Order screen displays with the information entered in the service request.

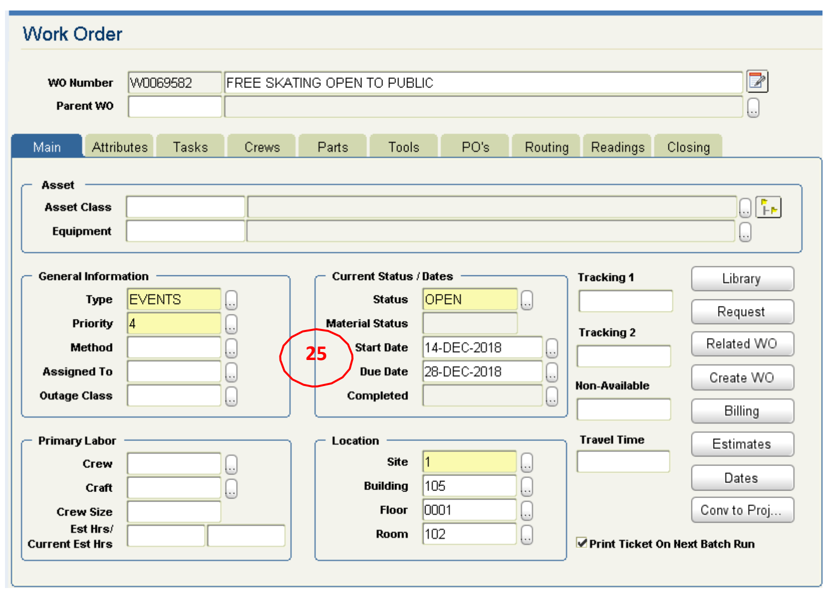
    From **Main** tab, in the **Current Status/Dates** section, enter:

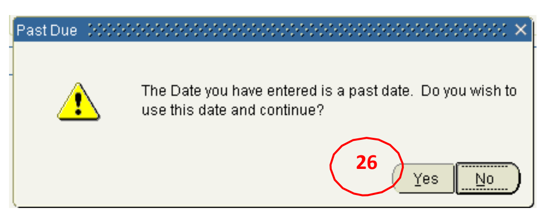
    a. **Start Date**

    b. **Due Date**

26. If the date entered is a past date, you will see a Past Due message.

    a. Click **Yes**.

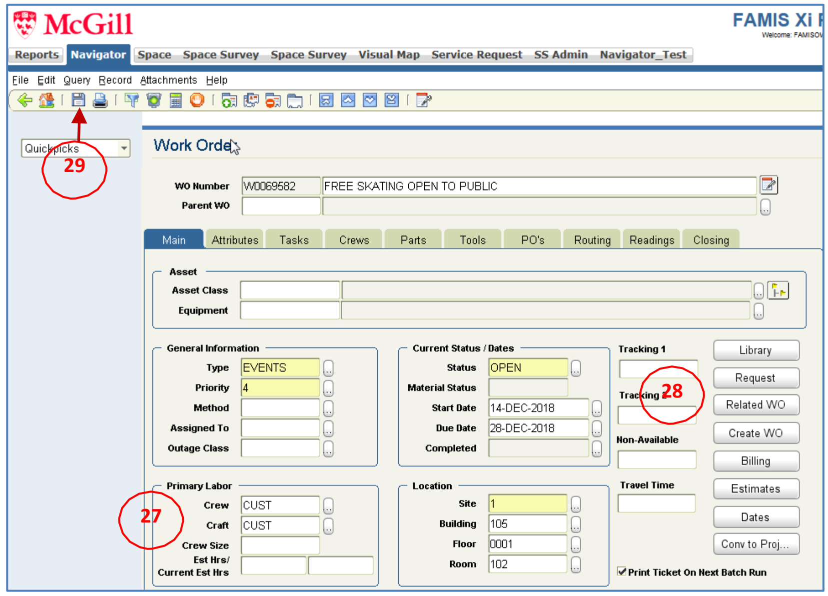




27. In the **Primary Labor** section, enter (or click) to enter the right value for **Crew** and **Craft** to ensure that it goes to the proper fund recovery fund:
    a. **Crew**
    b. **Craft**

The recovery fund for each value is as follows:

CUST	(custodial ops)	→ fund 163900
EVENT SUPP	(events support)	→ fund 163400
GROUNDS	(groundsmen)	→ fund 162000
BLDSER	(building services)	→ fund 163000



28. Use fields **Tracking 1** and **Tracking 2** to enter additional reference numbers.
    Note: there is a limit of 10 characters.
    (e.g. Banner booking conference #, Work Order # from Hospitality Services).

Note

If you have more than one crew, first create the parent work order with the first crew. You will then have to create a child work order for the other crew(s).

29. Click **Save** . Note that <u>no estimates</u> are required for this type of work order.

Tip

Remember to occasionally **save** your work request by clicking on the **Save** icon from the toolbar.

This work order remains open. You will periodically bill the client.

30. Click **Tasks** tab.
31. Copy and paste details from the email or request into the **Task List** field.
32. To attach a related document (e.g. email) to the work order:
    a. Click **Documents** from the right
    b. Click **New** from the **Work Order Attachments** screen.

33. From the **New Document** screen, select:
    a. **Type** : DOCUMENT (DIFFERENT DOCUMENT TYPES)
    b. **Description**: enter a description
    c. **Document** – click **Browse** to select the document (file)

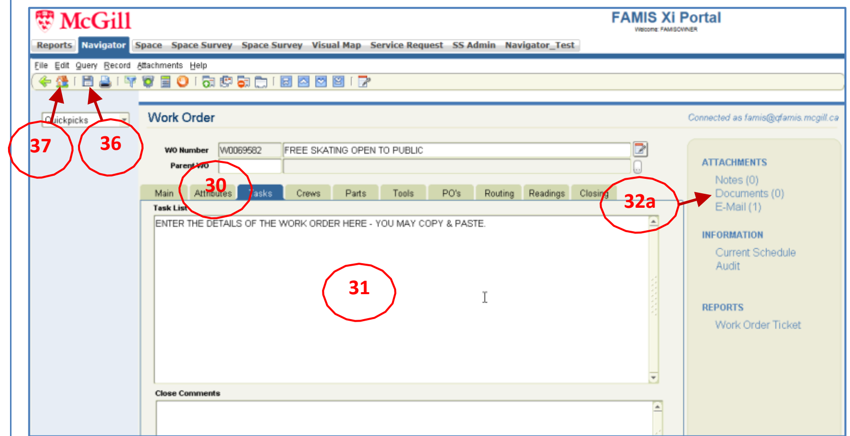
34. Click **OK**.

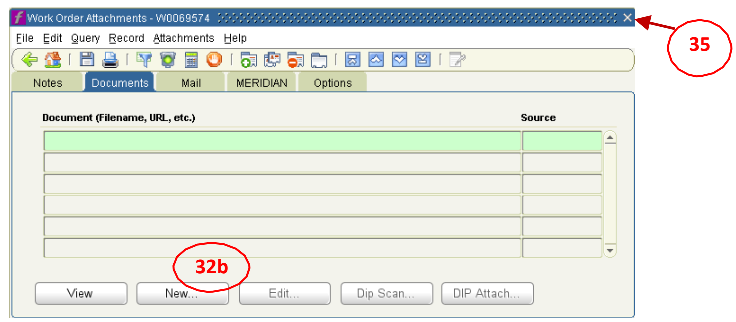
Note

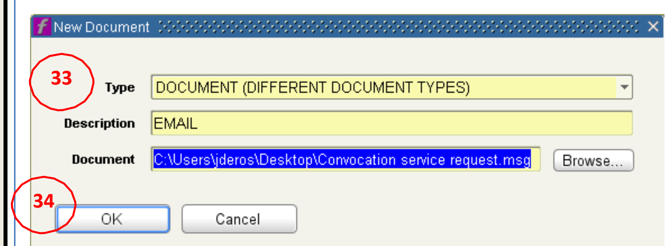
Before you select the file, access it and save it as one of these allowed file types by using **File > Save As**:

- pdf
- doc (Word)
- docx (Word)
- xlxs (Word)
- xls (Word)
- txt
- msg (email)
- dwf (Autocad)
- dwg (Autocad)

Ensure that the file name is no longer than 30 characters, with no spaces.







35. You will return to the Work Order Attachments screen. Close the **Work Order Attachments** screen by clicking on the **X**.

36. You will return to the Work Order screen. Click the **Save** icon.

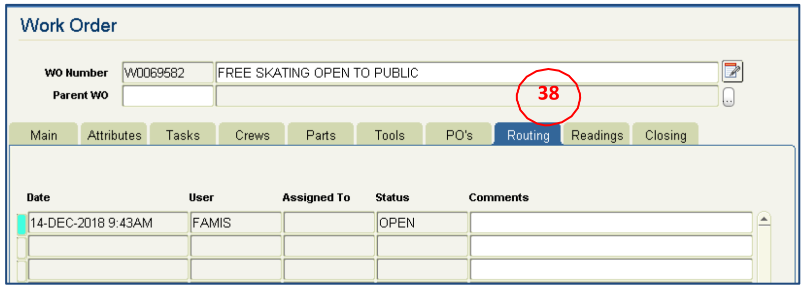
37. Click the **Home** icon.

Note

Take note of the Work Order number.

38. To see a summary of the actions performed in the Work Order, click on the **Routing** tab.

    This shows the user(s) that performed the action on the work order, and the date and time that this was performed.



39. If you are using additional crew(s), create a child work order for each crew. This is explained in the Create a Child Work Order section.

40. Click the **Home** icon .

> **Note**
>
> The next steps are performed in KRONOS:
> - Create assignments
> - Do the Overtime Payroll

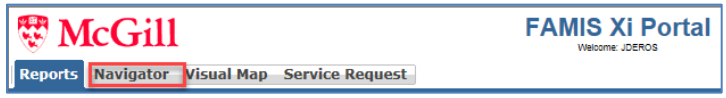
The next section (Add miscellaneous costs) describes how to bill the client periodically for a portion of the standing order.

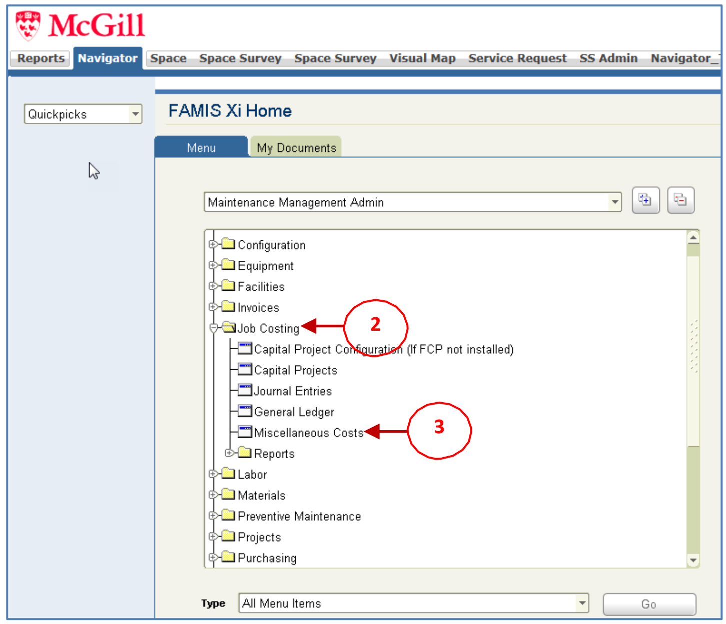
A Standing Work Order remains open. You do not need to close it unless it is no longer required. To close this Work Order, go to the section called 'Close the standing Work Order'.

Add miscellaneous costs

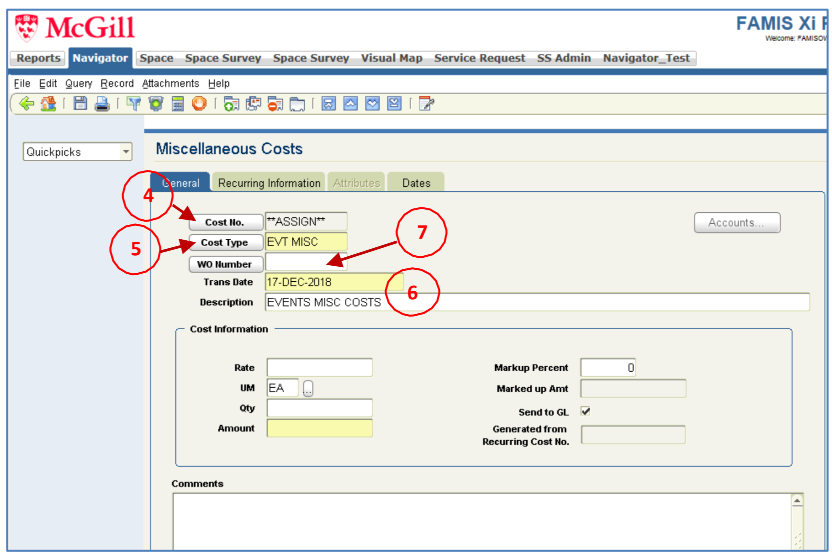
When you are ready to bill the client for a portion of the standing order (e.g. for labor, material), you will have to follow these steps:

1. Click the **Navigator** tab at the top.
2. Double-click the **Job Costing** folder.
3. Click **Miscellaneous Costs**.





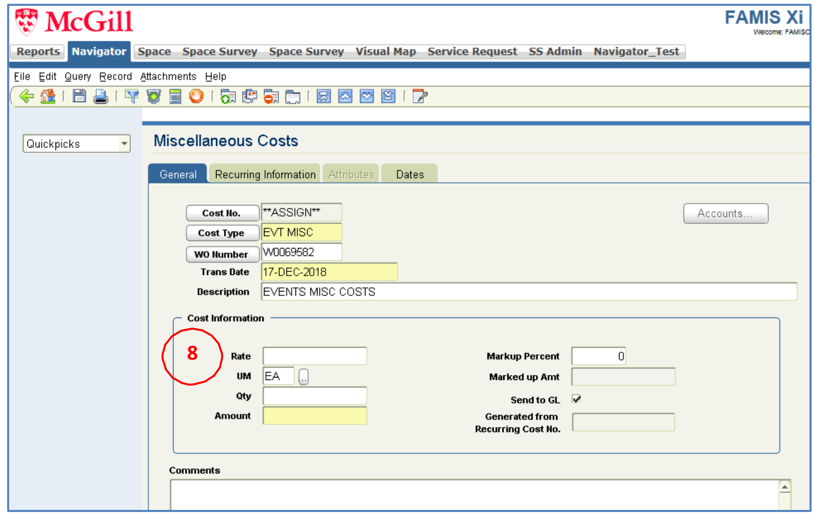
4. The **Cost No.** field displays **ASSIGN**.
5. In the **Cost Type** field, type '**EVT MISC**' and press Tab.
6. The **Trans Date** and **Description** fields are automatically filled in. If you wish, you may update the text in the **Description** field.
7. Enter the work order number in the **WO Number** field.
   a. If you do not know the number, go to the [Find the Work Order](#) section.



8. In the **Cost Information** section, enter the following fields and press Tab:
   a. **Rate** field – this is the cost (e.g. labor)

   b. **UM** field – enter **EA** for the unit of measure (EA refers to 'each')

   c. **Qty** field – this is the quantity.

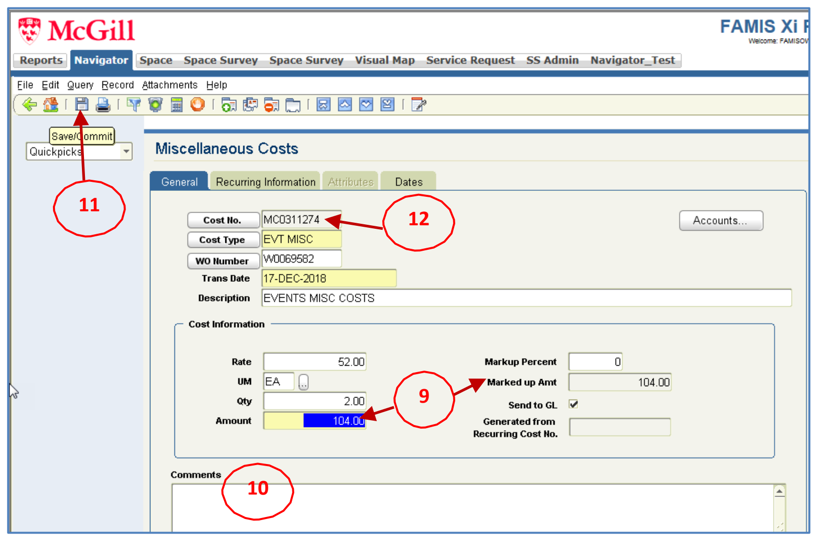


9. The total amount to be billed displays in the **Amount** field and in the **Marked Up Amt** field *(rate * quantity)*.

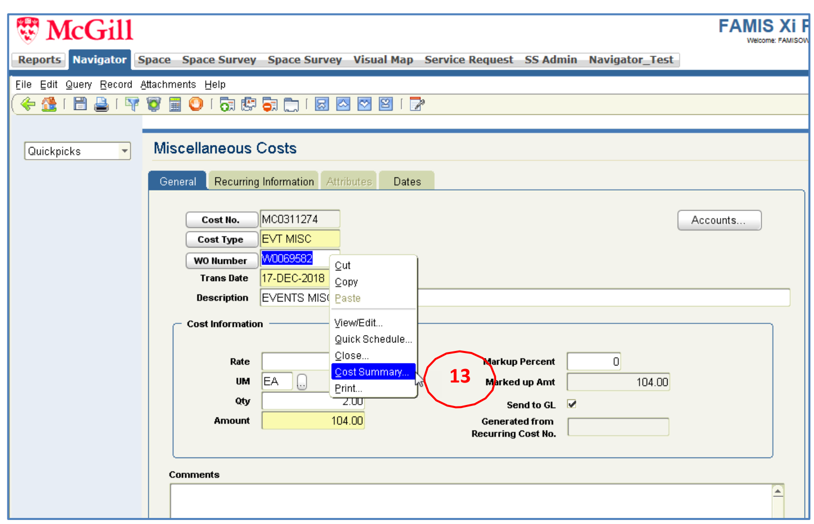
10. The **Comments** field is not required.

11. Click the **Save** icon .

12. The **Cost No.** is assigned.

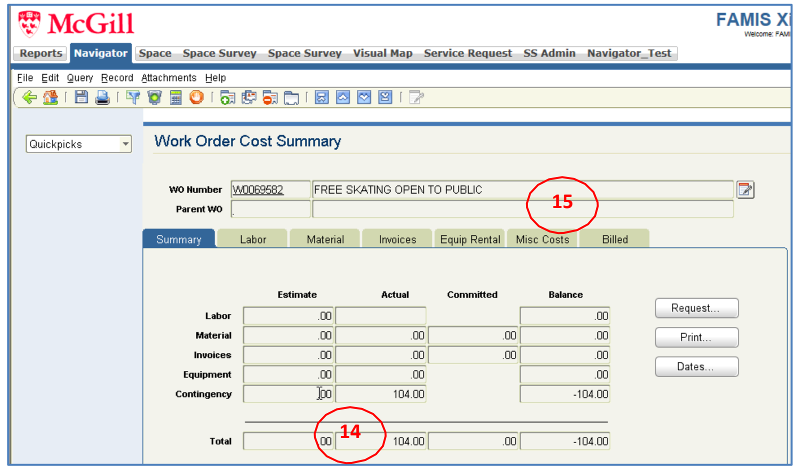


13. Right-click on the **WO Number** field and select **Cost Summary**.



14. The **Work Order Cost Summary** screen displays with the **Actual** charge to be billed.

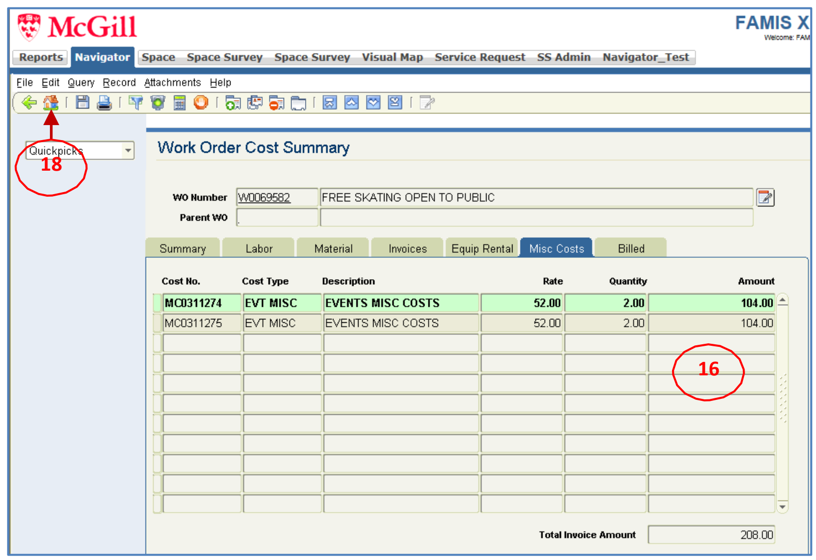
15. To verify the costs that will be billed, click on the **Misc Costs** tab.



16. The costs to be billed by the accounting area display here.

17. Once the general ledger is run, you will see this in the **Billed** tab. The sum of all the billed costs for this period displays.

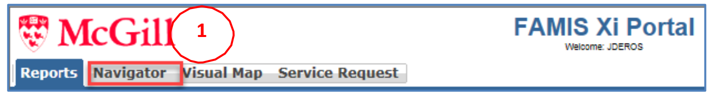
18. Click the **Home** icon .

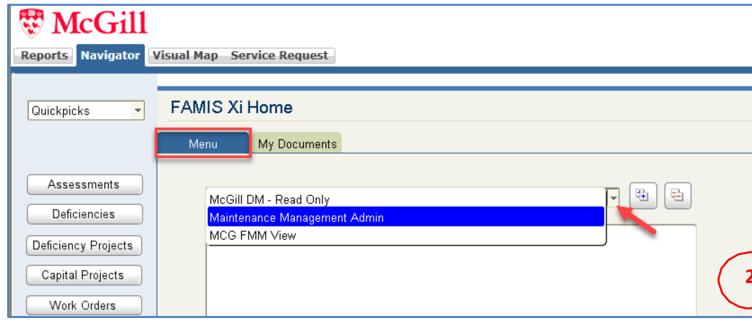


Close the Standing Work Order

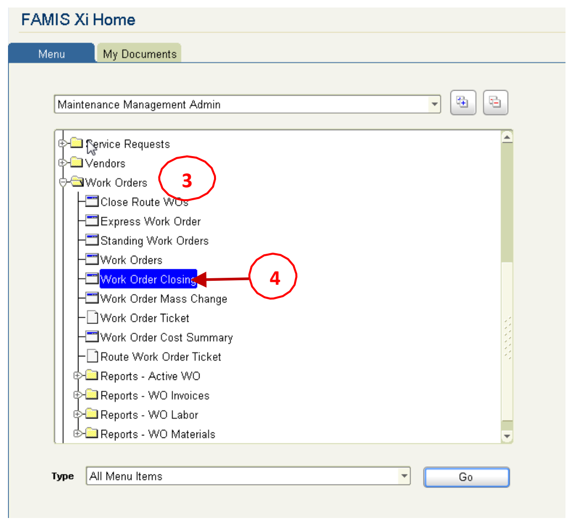
If the standing progressive order has to be closed because there is no longer a need for it:

1. Click the **Navigator** tab at the top
2. From the Menu tab, click on the down-arrow and select **Maintenance Management Admin**.

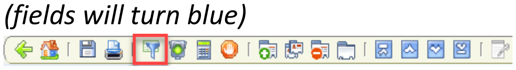




3. Folders display. Double-click **Work Orders**
4. Double-click **Work Order Closing**. The Work Order Closing screen displays.

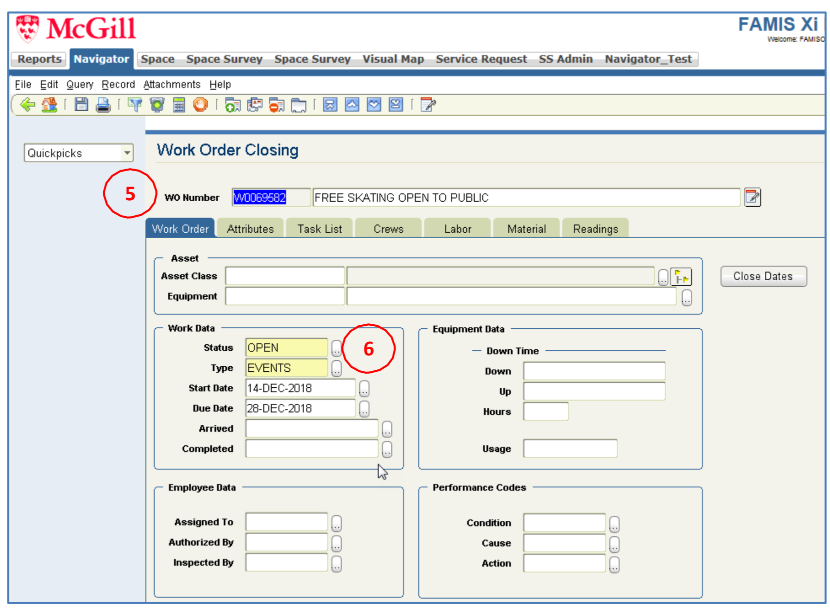


5. Enter the Work Order number in the **WO Number** field. If you do not know the number, go to the [Find the Work Order](#) section.
   a. Press F7 or click on icon from toolbar. *(fields will turn blue)*



   b. Enter Work Order Number in the **WO Number** field.
   c. Press F8 or click on icon from toolbar.

6. The Work order displays with a status of 'OPEN'.



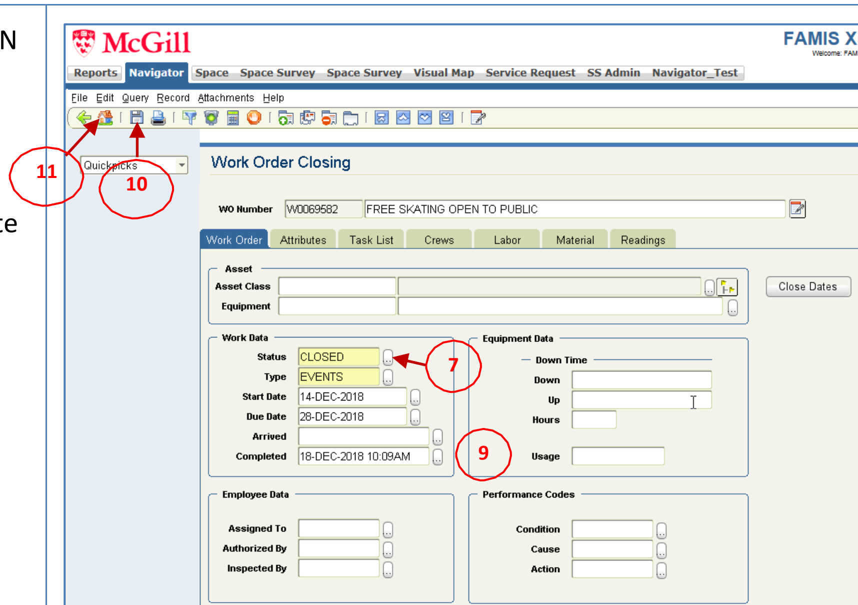
7. Change the **Status** of the work order from OPEN to CLOSED. To change the Status:
   a. Click ⬚ to select **CLOSED**
   b. Click **OK**.

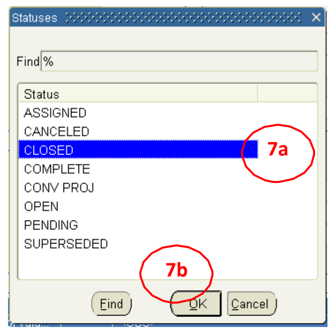
8. If the message displays to set the complete date to today's date, click **'Yes'**.

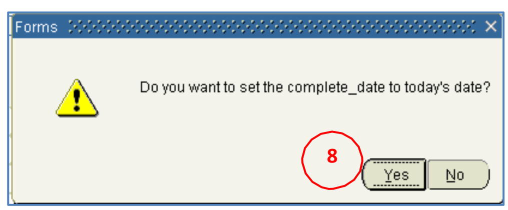
9. The **Completed** date displays.

10. Click the **Save** icon .

11. Click the **Home** icon .







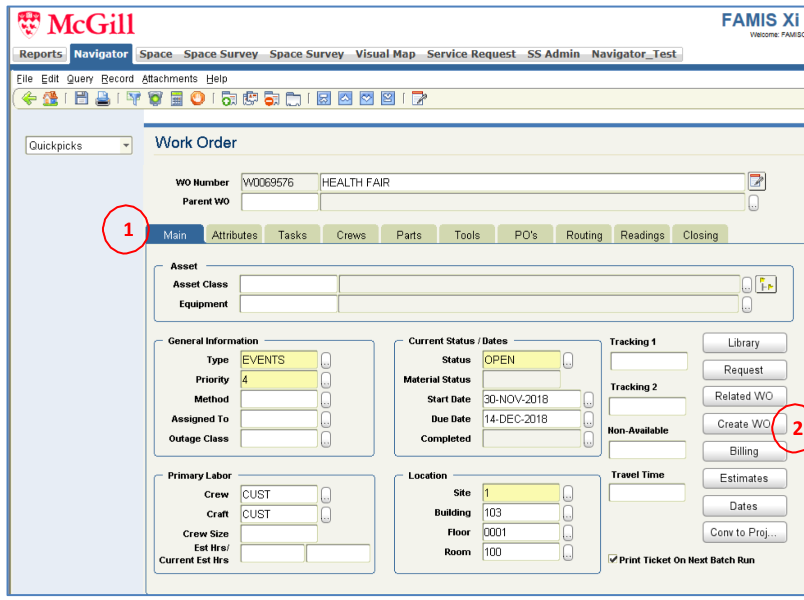
Note

Once the Work Order is closed, the **Routing** tab of the Work Order will indicate that the Status of the Work Order is **'Closed'**.

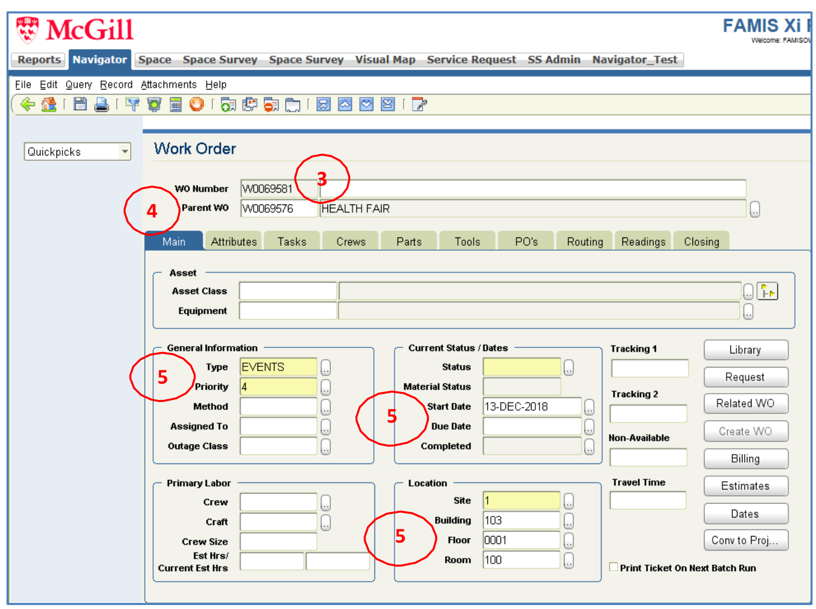
Create a Child Work Order

For billable, non-billable and standing progressive work orders that involve more than one crew (e.g. custodial, event support, rental), you will have to create work orders with a parent-child relationship. After you create the parent work order for one of the crew, follow these steps to create one or more child work orders for the other crew(s).

1. Go to the **Main** tab of the parent work order.
2. Click **Create WO** from the right.



3. This automatically creates a child work order that has its own work order number.
4. The parent work order number is viewable from the **Parent WO** field.
5. The child work order inherits some of the information from the parent work order:
   - Requestor
   - Location
   - General Information – Type & Priority
   - Start Date



Note

Information that should be added/updated to each child order is:

- Crew
- Craft
- Estimate for the crew
- Tasks
- Attached documents or emails

6. In the **Primary Labor** section, enter (or click) to enter the right value for the additional **Crew** and **Craft** to ensure that it goes to the proper fund recovery fund:
    - **Crew**
    - **Craft**

The recovery fund for each value is as follows:

CUST	(custodial ops)	→ fund 163900
EVENT SUPP	(events support)	→ fund 163400
GROUNDS	(groundsmen)	→ fund 162000
BLDSER	(building services)	→ fund 163000

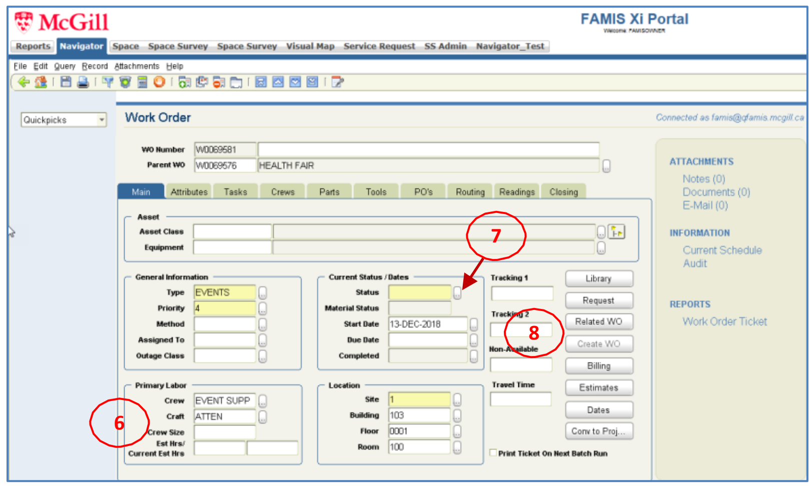
7. Enter the **Status** field:
    - Click next to the **Status** field
    - Select '**OPEN**'
    - Click **OK**

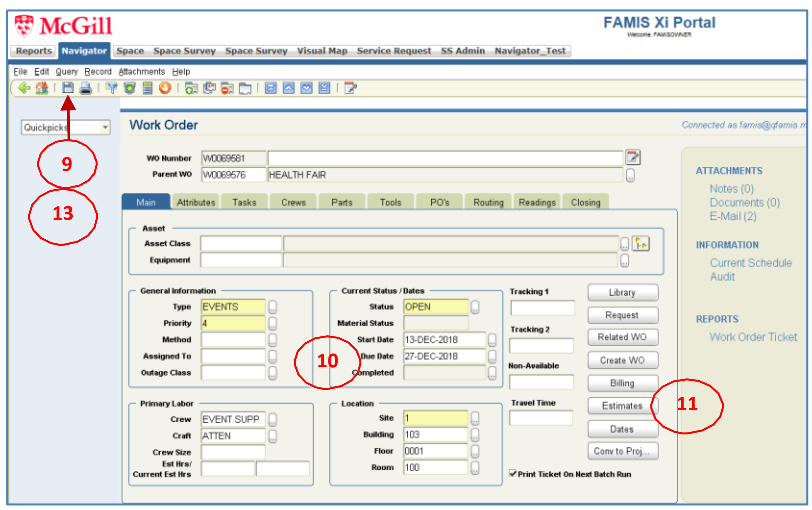
8. Use fields **Tracking 1** and **Tracking 2** to enter additional reference numbers.
Note: there is a limit of 10 characters.
(E.g. Banner booking conference #, Work Order # from Hospitality Services).

9. Click **Save** .

10. The **Due Date** will now display. This may be changed.

11. Click **Estimates**.

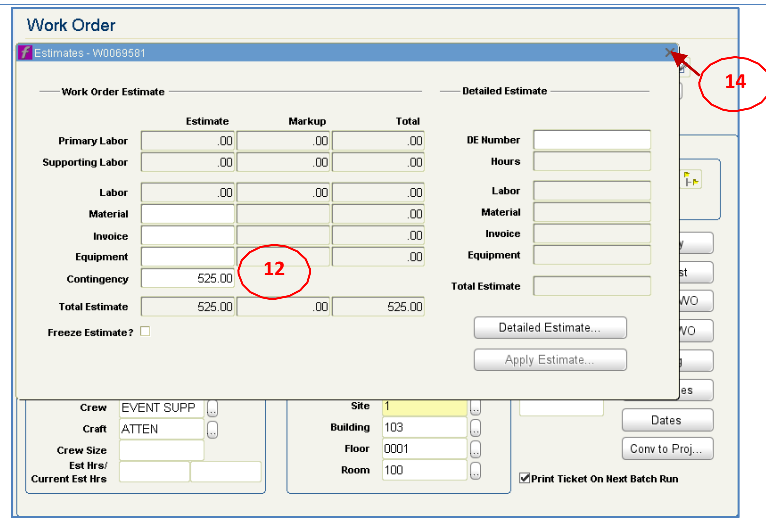




12. In the **Contingency** field of the Estimates screen, enter the total estimate for this crew and press Tab. This will update the **Total Estimate** field.

13. Click **Save** 

14. Close the **Estimates** screen by clicking on the **X**.



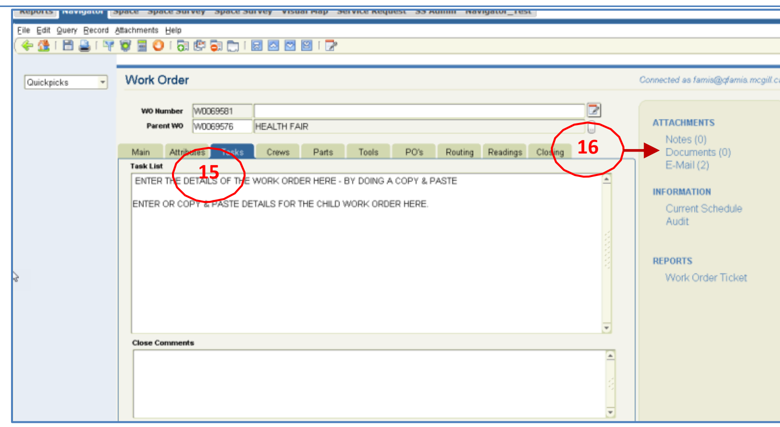
15. Click **Tasks** tab.
    - Tasks from parent work order display
    - Add details for this crew (you may copy and paste details from the email or request, such as information as what to do during and after shifts; additional information).

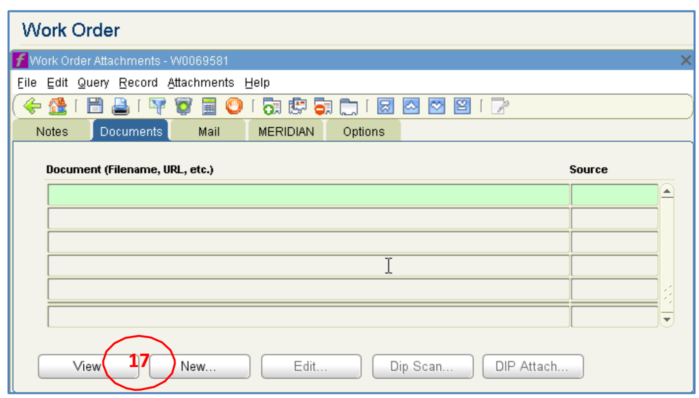
16. To attach a related document (e.g. email) to the work order, click **Documents** from the right. *Click OK if you get an error message.*

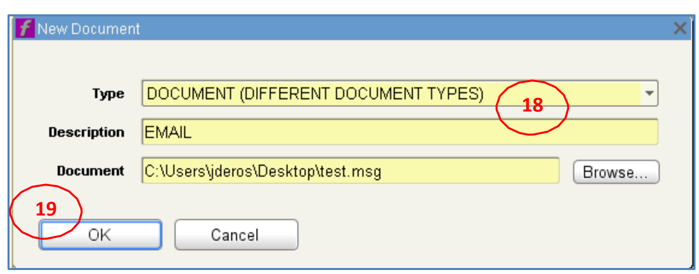
17. Click **New** from the **Work Order Attachments**.

18. From the **New Document** screen, select:
    a. **Type** : DOCUMENT (DIFFERENT DOCUMENT TYPES)
    b. **Description**: enter a description
    c. **Document** – click **Browse** to select the document (file)

19. Click **OK**.







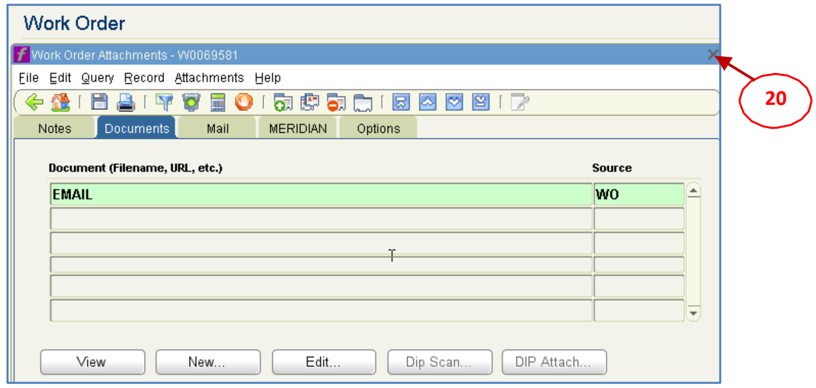
Note

Before you select the file, access it and save it as one of these allowed file types by using **File > Save As**:

- pdf
- doc (Word)
- docx (Word)
- xlxs (Word)
- xls (Word)
- txt
- msg (email)
- dwf (Autocad)
- dwg (Autocad)

Ensure that the file name is no longer than 30 characters, with no spaces.

20. You will return to the **Work Order Attachments** screen with the document you attached indicated. Close the **Work Order Attachments** screen by clicking on the **X**.



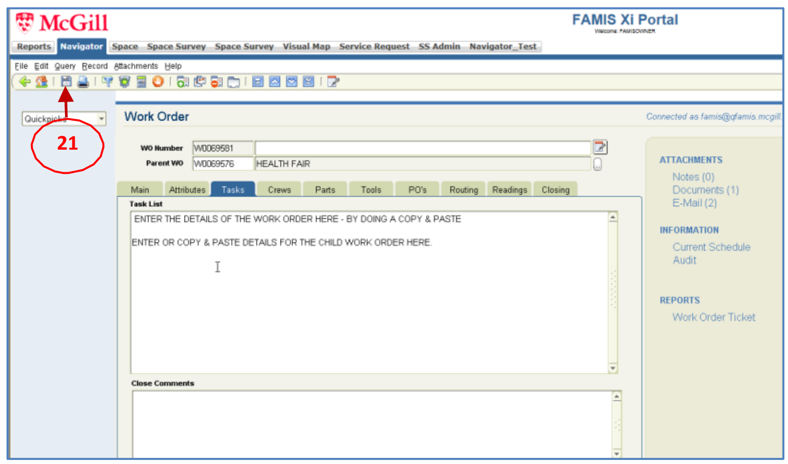
Note

If any changes are required to the estimate in the work order, return to the work order, make the change and save.

Changes are allowed until the work order has been billed.

21. You will return to the Work Order screen.

Click the **Save** icon from the toolbar.



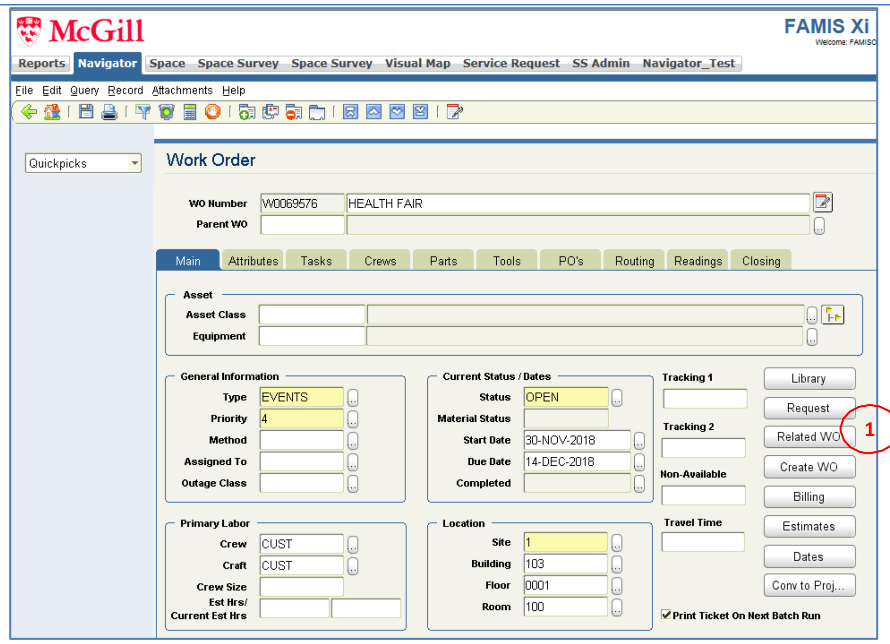
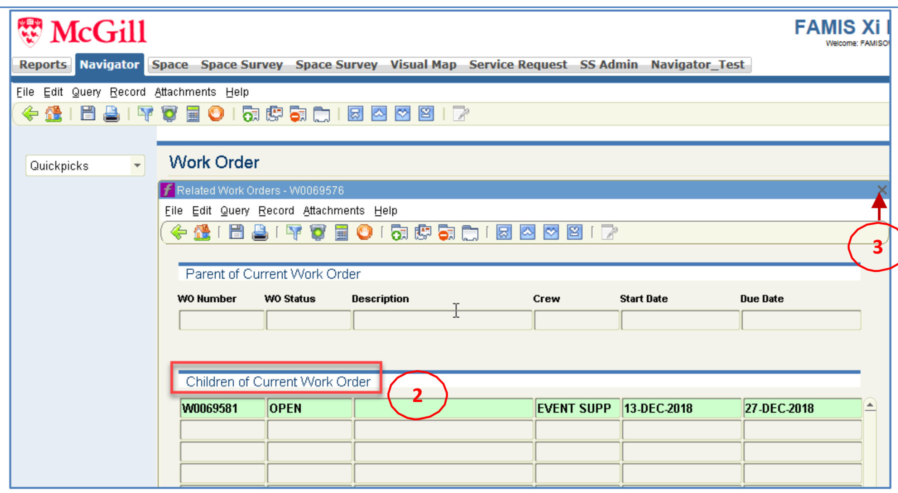
Note

After the event is completed, both the parent work orders and the child work orders have to be closed. This will allow the client to be billed.

Close the child work order by following the same steps as closing the parent work order.

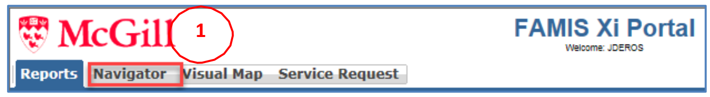
View related Work Orders

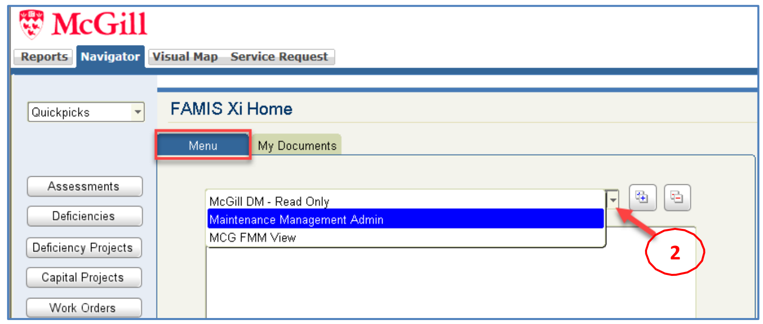
If you are on a parent work order, you may view the child work orders that are related to the parent work order.

<table>
<tr>
<td>1. When you are on the parent work order, click Related WO from the right</td>
<td>
</td>
</tr>
<tr>
<td>2. The list of ‘Children of Current Work Order’ display. Here, the related work order(s) display.</td>
<td>
</td>
</tr>
<tr>
<td>3. Close this window by clicking on the X. You are back on the parent work order.</td>
<td></td>
</tr>
</table>

Find the Work Order

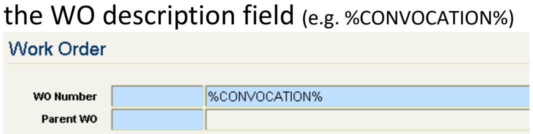
1. Click the **Navigator** tab at the top
2. From the Menu tab, click on the down-arrow and select **Maintenance Management Admin**.



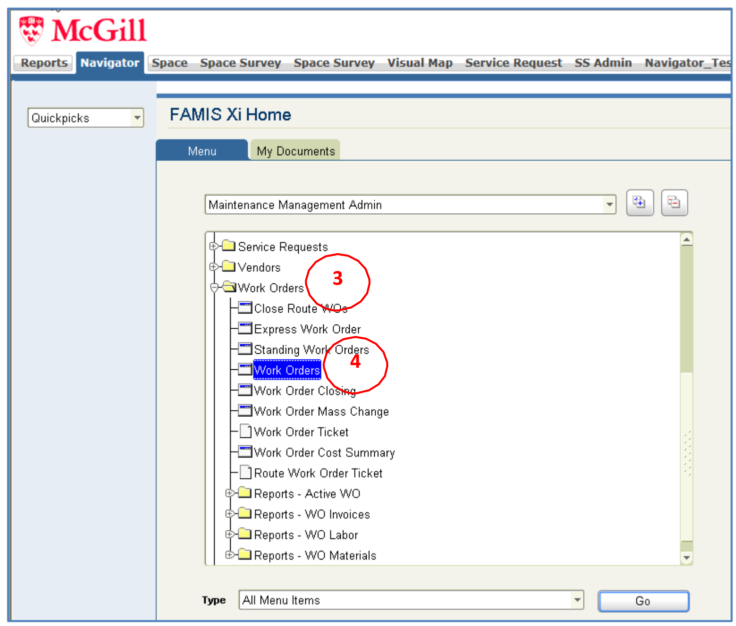


3. Folders display. Double-click **Work Orders**
4. Double-click **Work Orders**.
5. The Work Order screen displays.
6. To enter the Work Order number in the **WO Number** field.
   a. Press **F7** or click on icon from toolbar. *(fields will turn blue)*

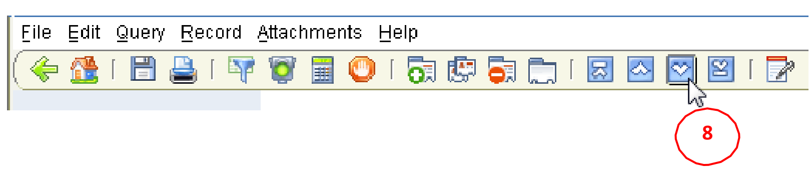
   b. Enter the description surrounded by % in the WO description field (e.g. %CONVOCATION%)



   c. Press **F8** or click on icon from toolbar.



7. The first work order that has the description displays. If this is the work order, take note of the work order number.
8. If it is not the right work order, use the **Next Record** icon to scroll thorough the work orders until you find the one you are looking for. Take note of the work order number.



Cancel a Work Order

To cancel your work order:

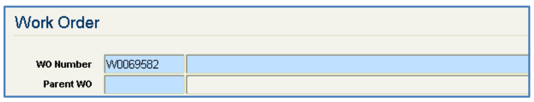
1. Access the Work Order.

2. Enter the Work Order number in the **WO Number** field. If you do not know the WO number, go to the [Find the Work Order](#)section.

   a. Press **F7** or click on icon from toolbar.
   (fields will turn blue)

   b. Enter the WO Number field.

   c. Press **F8** or click on icon from toolbar.

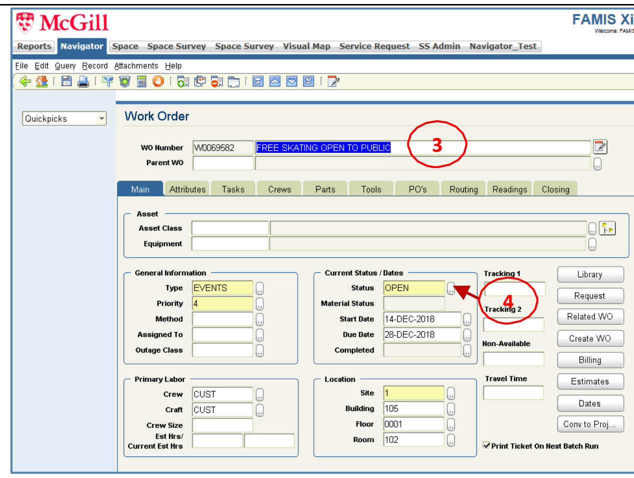
   

3. The Work Order displays.

4. From the Main tab of the Service Request, click on the … next to the **Status** field.

5. Select **CANCELED** from the Status list.

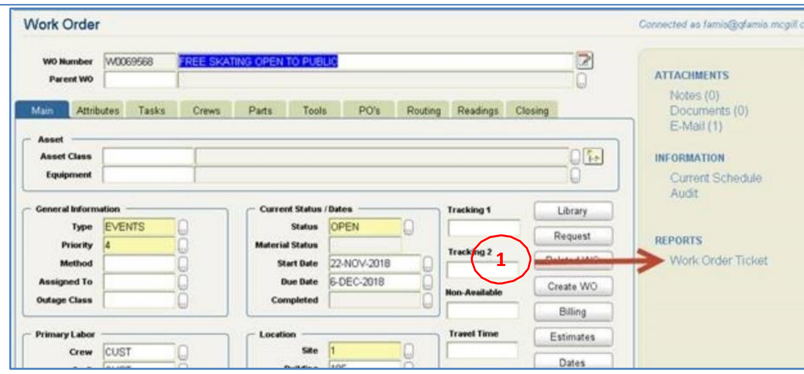
6. Click **OK**.



Print Work Order

To print your work order:

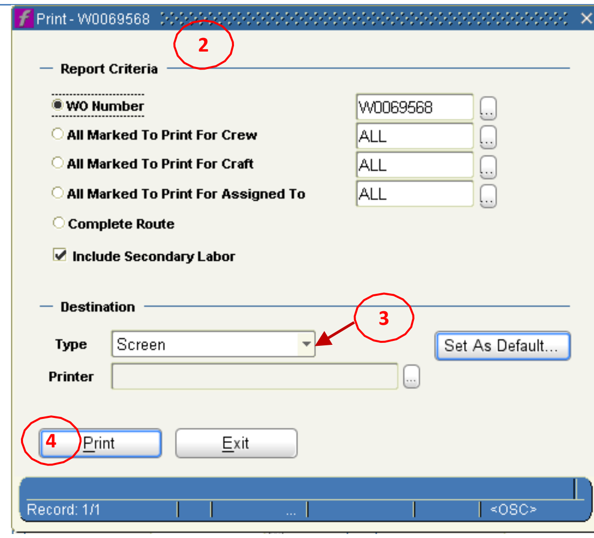
1. When you are on a work order, click on **Work Order Ticket** from the right.



2. The **Print** screen displays.

3. Click the down-arrow next to **Type** field to select the print destination (e.g. Screen)

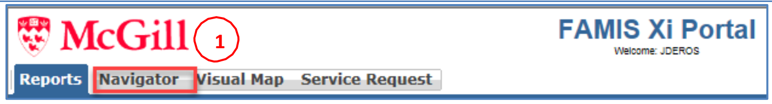
4. Click **Print**.

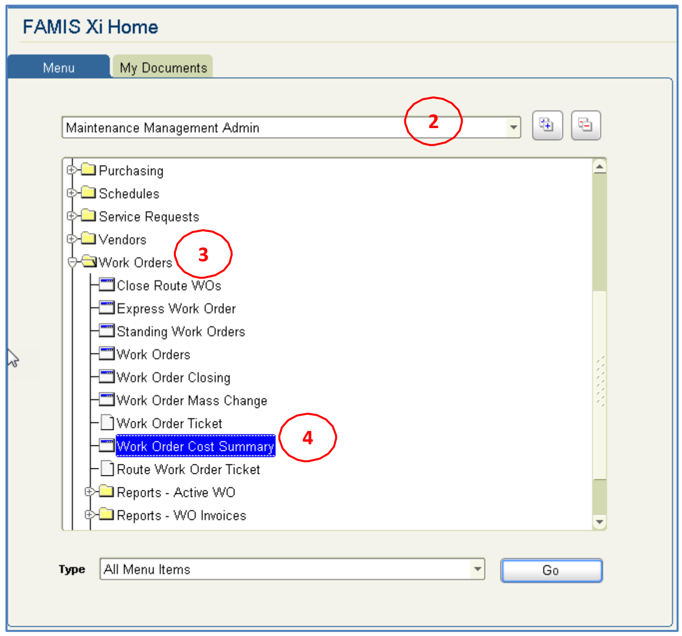


Ensure that the work order is billed

After the General Ledger is run, you can verify that the billing worked for your Work Order(s).

1. Click the **Navigator** tab at the top
2. From the Menu tab, click on the down-arrow and select **Maintenance Management Admin**.
3. Folders display. Double-click **Work Orders**.
4. Double-click **Work Order Cost Summary**

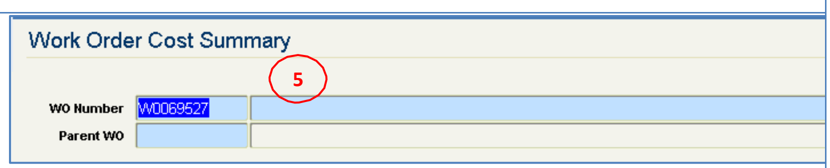


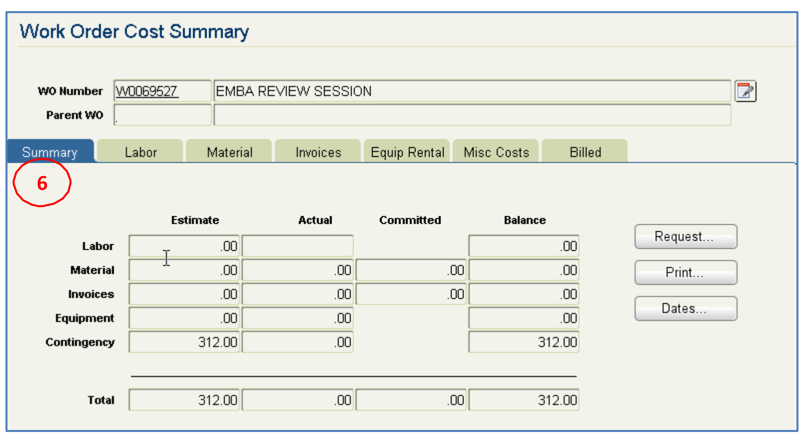


5. The Work Order Cost Summary displays. Enter the work order number in the **WO Number** field. If you do not know the number, go to the Find the Work Order section.
   a. Press **F7** or click on icon from tool bar. *(fields will turn blue)*

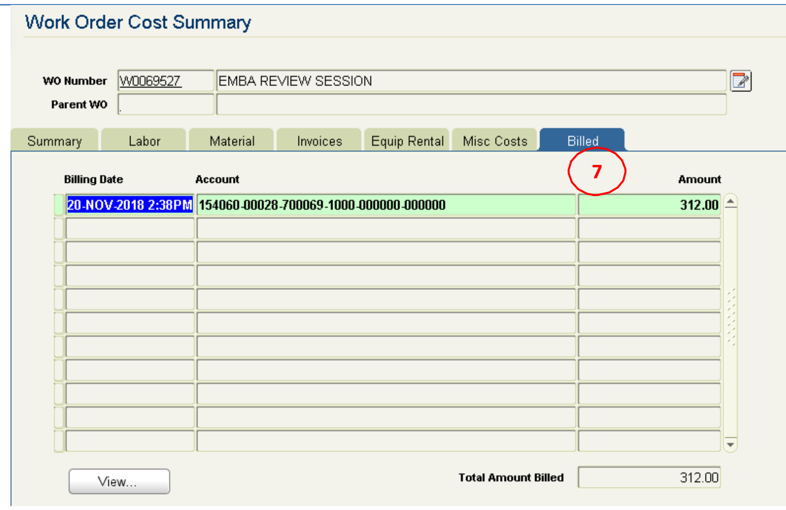
   b. Enter the Work Order number in the **WO Number** field.
   c. Press **F8** or click on icon from tool bar.

6. The **Work Order Cost Summary** screen will be filled in. The **Summary** tab displays the estimate.





7. Click the **Billed** tab to see the billed amount.



Cancel a Service Request

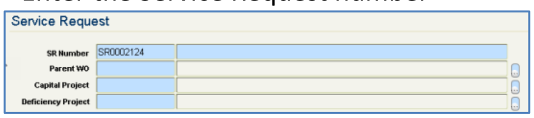
To cancel a service request:

1. Access the Service Request.
2. Enter the Service Request number in the **SR Number** field.

   a. Press **F7** or click on  icon from toolbar. *(fields will turn blue)*

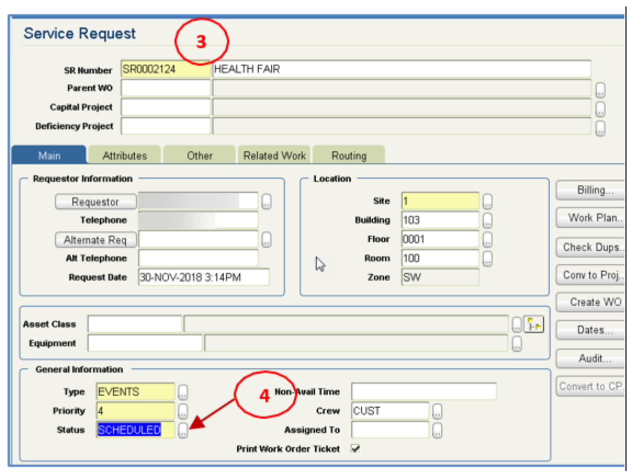
   b. Enter the Service Request number

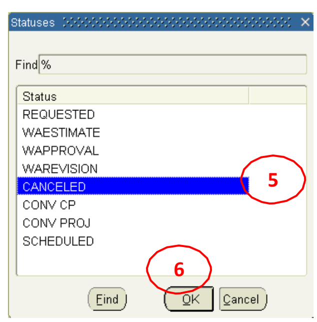
   c. Press **F8** or click on  icon from toolbar.

3. The Service Requests displays.

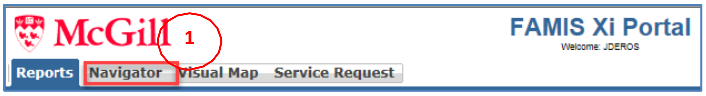
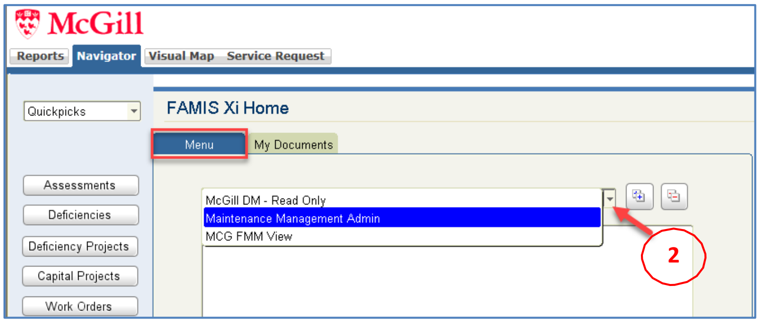
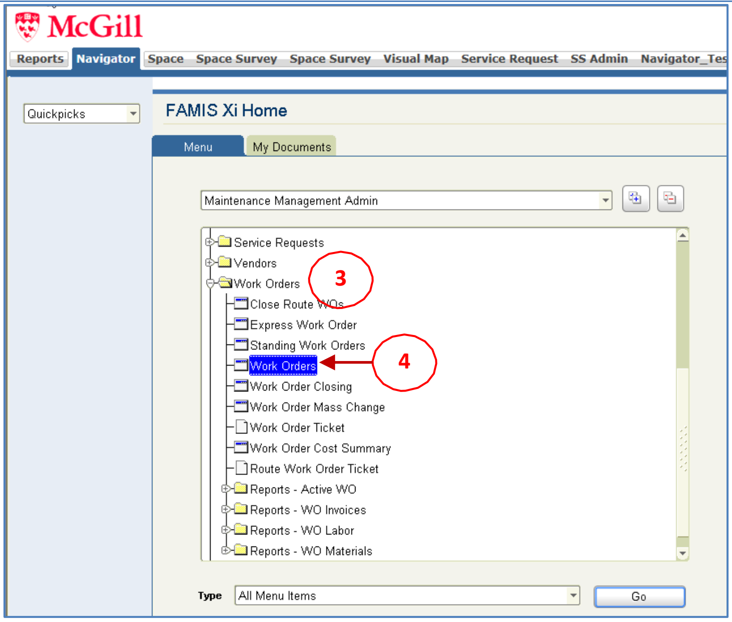


4. From the Main tab of the Service Request, click on the … next to the **Status** field to change it from SCHEDULED to **CANCELED**.
5. Select **CANCELED** from the Statuses list.
6. Click **OK**.



Find a service request related to a work order

If you know the work order number and want to know the service request number associated with it, follow these steps.

1. Click the **Navigator** tab at the top. 2. From the Menu tab, click on the down-arrow and select **Maintenance Management Admin**.	 
3. Folders display. Double-click **Work Orders** 4. Double-click **Work Orders**.	

5. Enter the work order number in the **WO Number** field and press F8. If you do not know the number, go to the [Find the Work Order]() section.

   a. Press F7 or click on icon from toolbar. *(fields will turn blue)*

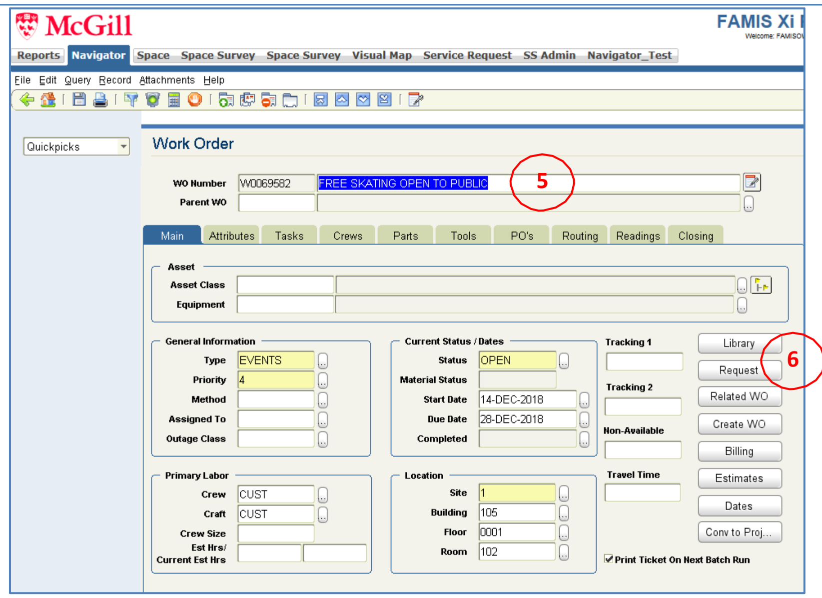
   

   b. Enter Work Order Number in the **WO Number** field.

   c. Press F8 or click on icon from toolbar.

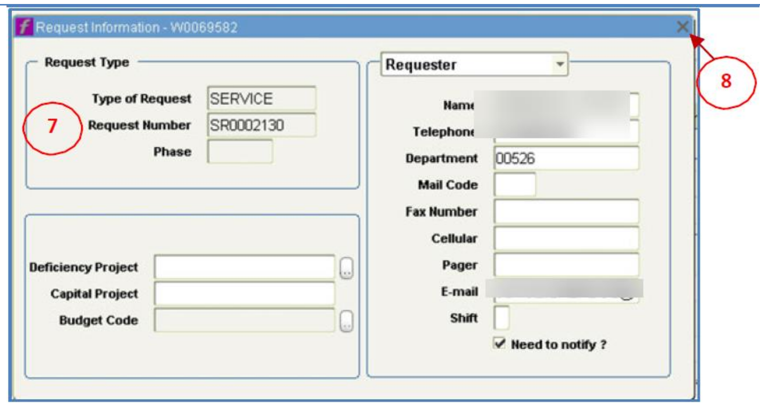
   

6. Click **Request** from the right.



7. The **Request Information** for the work order displays. The service request number displays in the **Request Number** field.

8. Close this screen to return to the work order.



Troubleshooting FAMIS

There are several things that can affect FAMIS Navigator from running properly. These are described below.

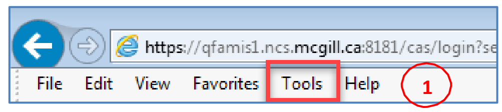
Browser

1. Ensure that you are using **Internet Explorer** as the browser.

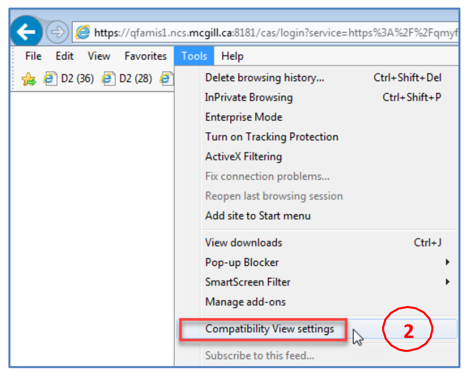
FAMIS only works with **Internet Explorer**.

Enable Compatibility View

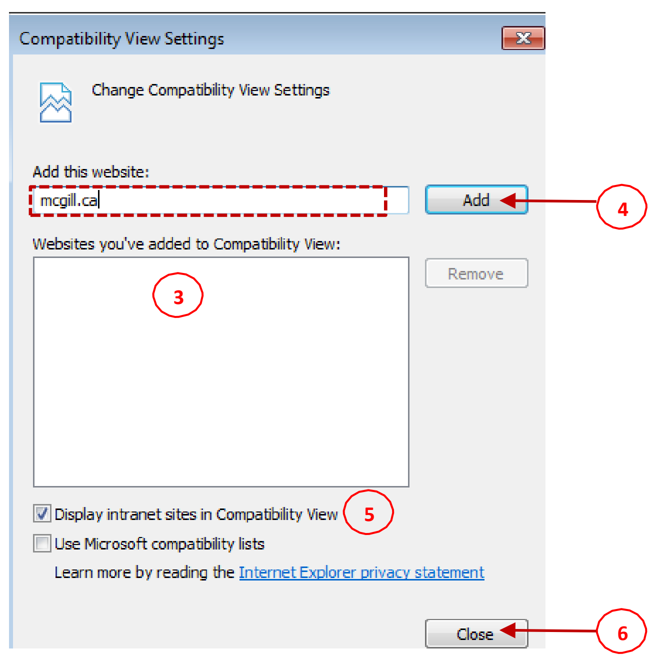
1. From Internet Explorer, go to the **Tools** menu.



2. Select “**Compatibility View settings**”.

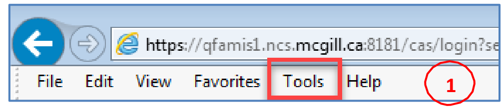


3. The website “**mcgill.ca**” should be listed in the box labelled ‘Websites you’ve added to Compatibility View’.
4. If it’s not, enter “**mcgill.ca**” in the box labelled “Add this website” then click the **Add** button.
5. Make sure there is a check in the box labelled “**Display intranet sites in Compatibility View**”.
6. Click **Close.**
7. Close FAMIS and access it again.

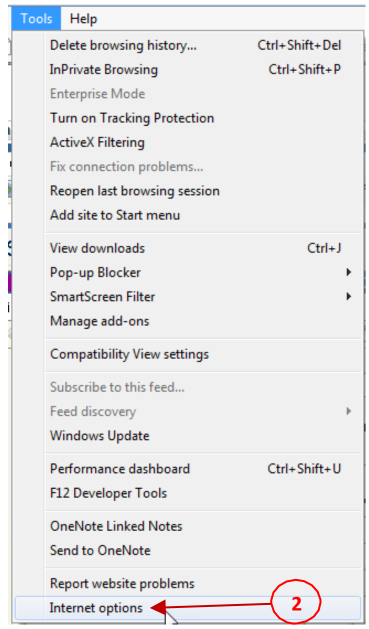


Add FAMIS as a trusted site

1. From Internet Explorer, go to the **Tools** menu.



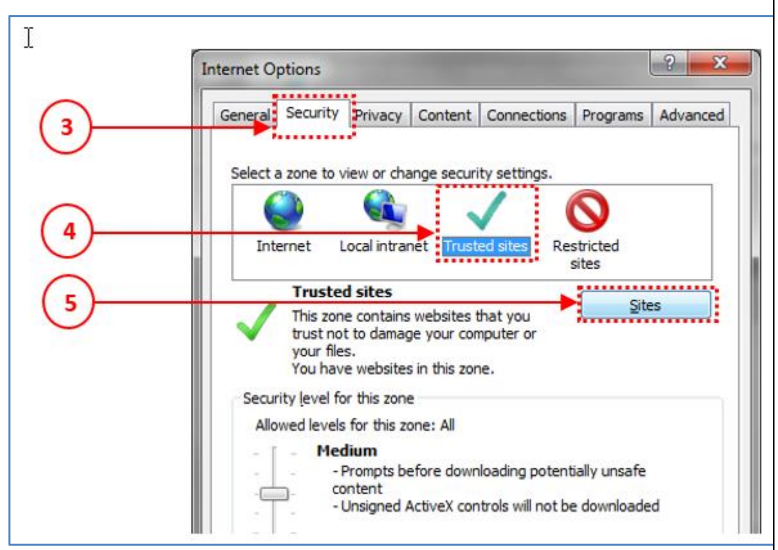
2. Select “**Internet Options**”



3. Click on the “**Security**” tab.

4. Click on the green checkmark named “**Trusted Sites**”.

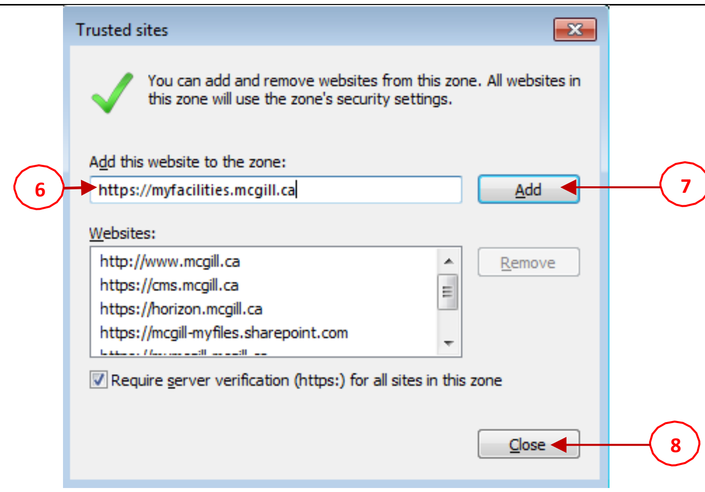
5. Click on the “**Sites**” button.



6. In the ‘**Add this website to the zone**’ box, enter these three websites, one at time:
   - https://myfacilities.mcgill.ca
   - https://pfamis1.ncs.mcgill.ca
   - https://myfacilities.mcgill.ca

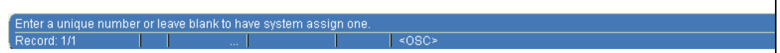
7. Click the **Add** button for each website.

8. Click **Close.**



If FAMIS is frozen (not working properly)

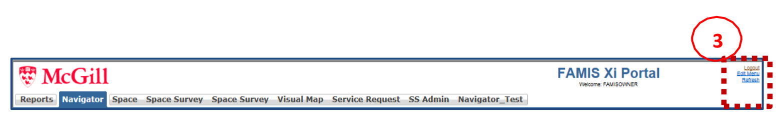
1. The status bar (blue bar) is located at the bottom of the screen. If you are having problems with FAMIS, look at the status bar for any error messages.



2. If FAMIS is still not working properly:
   a. Click the **Clear** icon to undo all the typing you entered on a form
   b. Click the **Back** icon
   c. Click the **Home** icon
   d. If you are in Query mode, click the **Stop** icon to exit Query mode

Icons from FAMIS menu bar 2

3. If FAMIS is still not working properly, you will need to reload FAMIS:
   a. Click the “**Refresh**” link located at the top right corner of the screen. You may also press the **F5** key to refresh.
   b. If Refresh doesn’t work, click the “**Logout**” link located at the top right corner of the screen. Then log in again.



4. If nothing else seems to work, exit all your internet browser windows (Browser, Minerva, etc.) and log in to FAMIS again.

Glossary

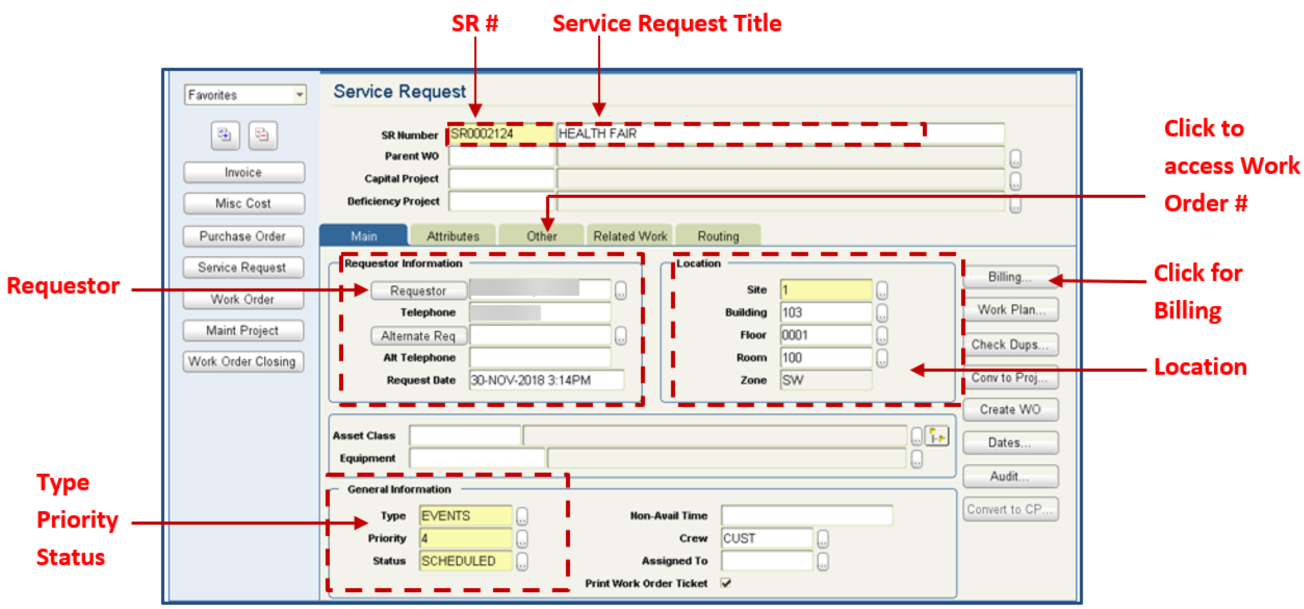
Term	Source	Description
Billing Type	Service Request Work Order	**EVT BILLABLE** – progressive standing order **EVT FIRM PRICE BID** – one-time event (firm price) **EVT IDC FIRM PRICE** – one-time interdepartmental charge, billable to an internal client. **EVT NON-BILLABLE** – not being charged to client (XMAS essential services for Building Services)
Building	Service Request Work Order	From the Location section - building code where event is held.
Contingency	Work Order	The amount of the total estimate. For firm price bids, enter the total amount. Refer to the quote for the breakdown of costs.
Craft	Work Order	From the Primary Labor section. Selecting the right value ensures that it goes to the proper fund recovery fund: CUST (custodial ops) → recovery fund 163900 EVENT SUPP(events support) → recovery fund 163400 GROUNDS (groundsmen) → recovery fund 162000 BLDSERV (building services) → recovery fund 163000
Crew	Work Order	From the Primary Labor section. Selecting the right value ensures that it goes to the proper fund recovery fund. CUST (custodial ops) → recovery fund 163900 EVENT SUPP(events support) → recovery fund 163400 GROUNDS (groundsmen) → recovery fund 162000 BLDSERV (building services) → recovery fund 163000
Dates	Service Request Work Order	**Start Date** – start date of event **Due Date** – end date off event
Floor	Service Request Work Order	From the Location section - Floor code where event is held.

FOAPAL	Service Request Work Order	**Chart of Accounts** – use '1' for McGill, '**EXT**' for externals **Index** – the fund **Fund** – indicates the source of money (6 digits) **Organization** - departmental entities or budgetary units within the University (5 digits) **Account** – describes the nature of revenues and expenditures in the Operating Ledger (6 digits). **Program** - the functional area in which funds are being spent (4 digits). **Activity** – may be used to further describe the purpose or nature of a transaction for their own reporting needs (6 digits). Location - may be used to further describe the physical location of a transaction for their own reporting needs (6 digits).
Parent WO	Work Order	This is the parent work order. A parent work order may have one or more child work orders associated with it. For billable, non-billable and standing progressive work orders that involve more than one crew (e.g. custodial, event support, rental), you will have to create work orders with a parent-child relationship.
Priority		1 = Emergency 4 = Regular
Request Date	Service Request	Date that the Service request and work order request is created.
Requestor	Service Request Work Order	Requestor name.
Room	Service Request Work Order	From the Location section - Room code where event is held.
Site	Service Request Work Order	1 = Downtown campus 2 = Macdonald campus
SR Number	Service Request	Service Request number.

Status	Service Request Work Order	For the Service Request, use the 'Scheduled' status. The Work Order statuses follow. Statuses 1 to 4 are Active Work Order. Statuses 5 and 6 are Inactive Work Orders: 1. Assigned 2. Open 3. Pending 4. Complete 5. Closed 6. Cancelled The only statuses you should use for a Work Order are **Open**, **Closed**, **Complete**.
Tracking 1	Service Request	Use to enter additional reference numbers (e.g. Banner booking conference #, Work Order # from Hospitality Services). **Note**: there is a limit of 10 characters.
Tracking 2	Service Request	Use to enter additional reference numbers (e.g. Banner booking conference #, Work Order # from Hospitality Services). **Note**: there is a limit of 10 characters.
Type	Service Request Work Order	Select the correct type that corresponds to the event. This will facilitate the breakdown and reporting: **EVENTS** – use for events that involve one or multiple teams (e.g. Convocation) **IDC EVENTS** - this is usually extra work required for 1 day (e.g. James Admin cleanup) and the service request is processed after the work is done. **REN EVENTS** – use for events that require rentals.
WO Number	Work Order	Work Order number.
WO Status	Work Order	Work Order status

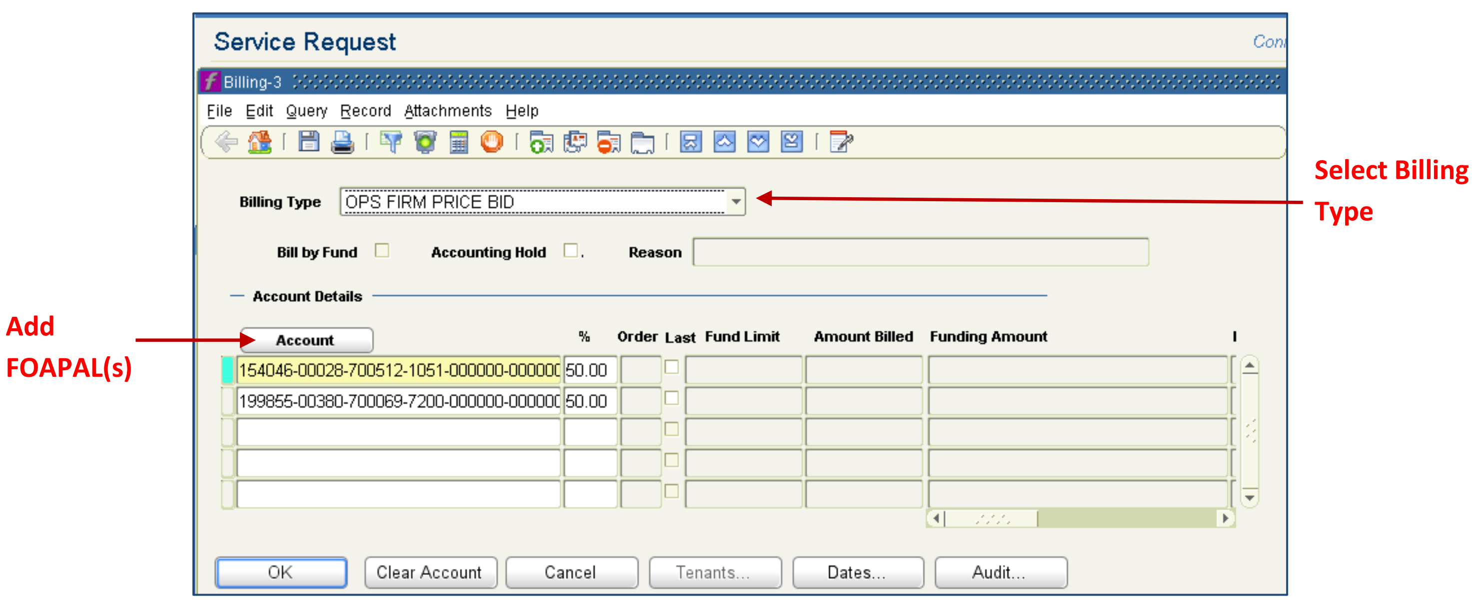
Additional Resources

FAMIS Service Request

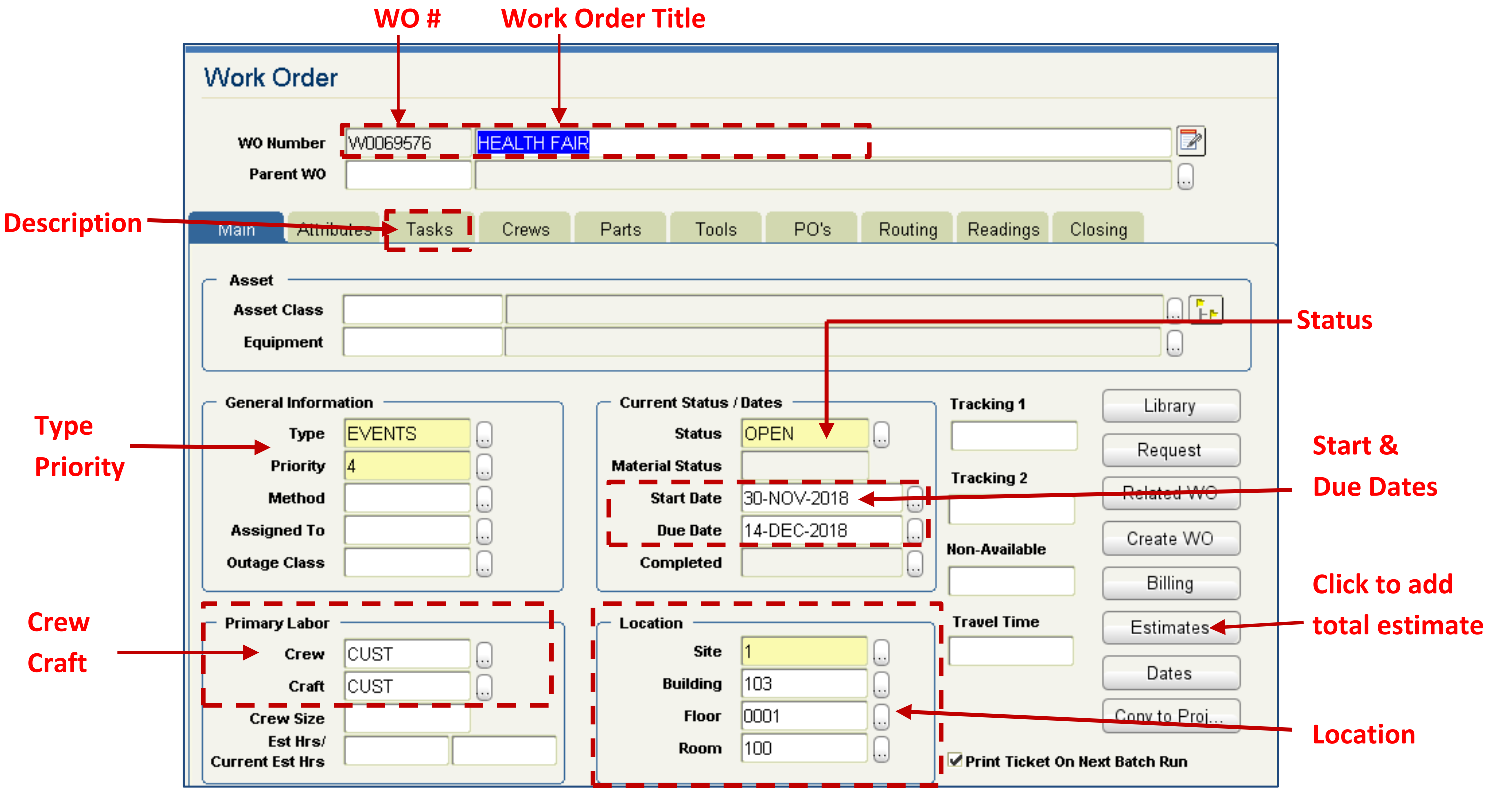


FAMIS Service Request – Billing

To select the billing type and the FOAPAL, click ‘**Billing’** from the Service Request.



FAMIS Work Order



Need help?

If you need more help with FAMIS, contact your Administrator or IT Support.

Administrator	Contact Gabriela Pinto if you cannot access FAMIS or you do not have the FAMIS certificate installed.
Contact IT Support – by email, telephone	For any other issues: Email: itsupport@mcgill.ca Call: 514-398-3398