

Using FAMIS for Event Management

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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:
 - o Equitable distribution of overtime among full-time employees
 - Temporary (casual work) assignments
- Bill internal and external clients for services rendered
 - o 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 <u>IT Support</u> .
2.	Ensure that you are granted the access to use FAMIS.	If you cannot log in to FAMIS, contact your Administrator or <u>IT Support</u> .
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 <u>Troubleshooting FAMIS</u> section first.
		If this still does not work, contact <u>IT Support</u> .



Log into FAMIS

₩ McGill
Welcome to FAMIS Please enter your McGill Username (john.smith@mail.mcgill.ca or john.smith@mcgill.ca) and McGill Password (McGill email password). McGill Username 3 LOGIN Warn me before logging me into other sites. Copyright © 2010 - McGill. All Rights Reserved.
Image: Security continues of the security. We recommend that you close this webpage and do not continue to this website. Image: Click here to close this webpage. Image: Continue to this website (not recommended). Image: More information
Reports Navigator Visual Map Service Request
Warning - Security Image: Security concern. Java has discovered application components that could indicate a security concern. Image: Security concern. Name: oracle.forms.engine.Main Block potentially unsafe components from being run? (recommended) More Information 5 Image: Noise Contact the application contains both signed and unsigned code.



6. l' c <i>L</i> t	f you get the warning that Java is out of date, click 'Run this time '. Do <u>not</u> click 'Update plug-in' – FAMIS may then not work on your computer.	6 FAMIS SU Portal * * <t< th=""></t<>
7. Y	You should see the Java logo while it loads.	FAMIS Xi Portal Laured Interne FAMISONER Enterne Reports Navigator Space Visual Map SS Admin Space Survey Service Request
Note	If the FAMIS Navigator does not load, refer to the <u>Troubleshooting FAMIS</u> section. If this does not work, contact your Administrator or <u>IT Support</u> .	Java 7

Log Out of FAMIS

1. Click Logout from the top-right corner of the FAMIS screen.	Reports, Revigator, Space Space Survey Space Survey Visual Map Service Request SS Admin Navigator_Test	FAMIS XI Portal	
You may have to sometimes log out and then log back in if FAMIS is not working properly. For more information, see the <u>Troubleshooting FAMIS</u> 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.

Eile	⊑dit	Query	Red	cord	Attacl	nmer	nts	Help	-		Menu	ı bar						
([💾 j		🏹	0		0	1	a 🕼	5		R	\sim	\diamond	2	[2 🔸	Tool 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 .
1	Execute Query	Use to execute a query. Or you may use F8.
0	Cancel	Use to cancel (stop) a query.
	Count Hits	Use to see how many records will be returned by the query you entered.
O	Insert	Use to insert a record.
E.	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 <u>Query</u> <u>mode</u> 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 room 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 ¹ 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.

FRM-40301: Query (caused	l no records to k	e retrieved. Re-enter.	
Record: 1/1		Enter-Qu	1	<08C>

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 FAMIS Xi Portal Strail McGill 1. From the left, click on the down-arrow and Reports Navigator Visual Map Service Request select Favorites. FAMIS Xi Home Favorites Menu My Documents * 3) 2. Your favorites that are already set up display (1Invoice (e.g. Service Request, Work Order). McGill DM - Read Only • Misc Cost Purchase Order 3. Click the **Add Favorite** button Purchase Requisition Service Request Work Order Maint Project Favorites that you may consider 沁 adding are: Service Request Work Order • Work Order Closing • Type All Menu Items • Work Order Job Costing Which type of application would you like to add? 4. From the Add Favorite Button screen, select 'Form' and click Next 4 Report Web Pag < Back Next > Cancel 5. Click on the down-arrow next to Application to select the favorite. Which application would you like to add and how would you like the button labeled? (e.g. Work Order Closing) Application Work Order Closing 5 6. Type an appropriate label in the **Button Label** Button Label Work Order Closing 6 field. Finish < Back Cancel 7. Click **Finish**. The new favorite will now be 7 added to your list of favorites.



Delete favorite

- 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 downarrow to select the favorite you wish to delete.
- 5. Click **OK**. The favorite will disappear from your list of favorites.

Favorites that you may consider deleting are:

Invoice

沁

- 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







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 <u>parent</u> work order following the steps below. Then, create one or more <u>child</u> work orders (described in the <u>Create a Child Work Order</u> section).

Create a Service Request

1. Click the Navigator tab at the top	CGIII FAMIS XI Portal Wecome JOEMOS Visual Map Service Request
2. From the Menu tab, click on the down-arrow and select Maintenance Management Admin .	Reports Navigator Visual Map Service Request Quickpicks FAMIS Xi Home Assessments Menu Deficiencies McGill DM - Read Only Deficiency Projects Capital Projects Work Orders Work Orders
 Folders display. Click the + next to Service Requests (or double-click) and double-click Service Requests. If you have set up Service Requests as a favorite: Click on the down-arrow next to Quickpicks 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. 	Vouckpicks Vouckpicks FAMIS XI Home Meru My Documents Mintenance Management Admin Prepuispont Facilities Projects Projects Projects Schiedules Schiedules







- 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**.
- 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
 Click OK
- 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.





Find Criteria

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.

💁 (홈 🚔 📽 🛢 🔕 (하 약 하 🗂) 🗟 🖾 🎯 ()





Order Ticket

 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. 	Service Request
 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 	Account Details Chart of Accounts I Index 199055 I
 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: if your Fund/Organization/Program 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. 	Account Details Index Index 199855 Bescription Fund 199855 Index Program 7200 Activity 000000 Index Index Image: Program Program Content Image: Program Image: Program </td















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.

Sote S	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) xls (Word) txt msg (email) dwf (Autocad) dwg (Autocad) Ensure that the file name is no longer than 30 characters, with no spaces.	3 3 E
39. You v Attac attac Attac	vill return to the Work Order hments screen with the document you hed indicated. Close the Work Order hments screen by clicking on the X .	

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





41. To see a summary of the actions performed in	FAMIS XI Portal Reports Navigator Space Survey Visual Map Service Request SS Admin Navigator_Test
 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 <u>Create a Child Work Order</u> section. 43. Click the Home icon . 	42 Work Order Connected as family/genes.mcgit ce 42 Work Order Connected as family/genes.mcgit ce Work Order Main Attracer Main Attracer Tasks: Crews Bate Beer Assigned to Sole: Sole: Connected Sole: Connected Sole: Sole: Connected Sole: Sole: Connected Sole: Sole: Connected Audit Sole: Connected Audit REPORTS Work Order Ticket Work Order Ticket
 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 <u>each</u> 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 <u>Find the Work Order</u> section.	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.
 Click the Navigator tab at the top From the Menu tab, click on the down-arrow and select Maintenance Management Admin. 	Reports Navigator Visual Map Service Request
	Reports Navigator Visual Map Service Request Quickpicks FAMIS Xi Home Quickpicks FAMIS Xi Home Menu My Documents Deficiencies Menu My Documents Deficiency Projects Capital Projects 2 Work Orders Vork Orders 2



3. Folders display. Double-click Work Orders	FAMIS Xi Home
4. Double-click Work Order Closing . The Work Order Closing screen displays.	Maintenance Management Admin Imaintenance Management Admin Imaintenance Management Admin Imaintenance Requests Imaintenance Requests Imaintenance Requests Imaintenance Requests Imaintenance Requests Imaintenance Management Admin Imaintenance Requests
 5. To enter the Work Order number in the WO Number field. a. Press F7 or click on ricon from toolbar. (fields will turn blue) Enter Work Order Number in the WO Number field. Work Order Closing Press F8 or click on ricon from toolbar. Press F8 or click on ricon from toolbar. 	Image: Service Reguest FAMIS XI Portal Brendstall Visual MagService Reguest. Ere Ere grunn gezent datarhamittig bet Image: Service Reguest. Vork Order Closing Connected as planoligidania negative Vork Order Closing Connected as planoligidania negative Vork Order Closing Image: Service Reguest. Vork Order Closing Connected as planoligidania negative Vork Order Closing Image: Service Reguest. Vork Order Ticloit Image: Service Reguest. Vork Order Ticloit Image: Service Reguest. Vork Order Ticloit Image: Service Reguest. Reports Image: Service Reguest. Reports Image: Service Reguest. Report Service Reguest. Image: Service Reguest. Report Service Reguest.
 6. The Work order displays. Change the Status from OPEN to CLOSED. To change the Status: a. Click is 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. 	Statuses Find M Status ASSIGNED CANCELED Ga CLOMPLETE CONV PROJ OPEN PENDING SUPERSEDED Ein Gb QK
 9. Click the Save icon from the toolbar. 10. Click the Home icon from the toolbar. 	Forms WWWWWWWWWWWWWWWWWWWWWWWWWWWWWWWWWWWW



Note G

Once the work order is <u>closed</u>, the billing will automatically be run by Accounting. Go to the <u>Ensure that the work order is billed</u> section to ensure billing took place. You can modify the amount of the work order until it is billed.

Note G

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

WO N Par	umber ent WO	W0069	523	HEALTH FAIR							
Main	Attrib	utes	Tasks	Crews	Parts	Tools	PO's	Routing	Readings	Closing	
)ate			Use	r	Assigned To	Status	Co	mments			
20-NO\	-2018 1	1:31AM	JD	EROS		OPEN					-
20-NO\	/-2018 1	1:51AM	JD	EROS		OPEN					
6-DEC-	2018 10	45AM	JD	EROS		CLOSED					
10-DEC	-2018 1	2:16PM	JD	EROS		OPEN					
10-DEC	-2018 1	2:17PM	JD	EROS		CLOSED					
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									<i></i>		
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					1						



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 <u>after</u> the work is completed.

Create a Service Request

1. Click the Navigator tab at the top 🐯 McGill FAMIS Xi Portal JDEROS Reports Navigator Visua Map Service Request 2. From the Menu tab, click on the down-arrow and Strail McGill select Maintenance Management Admin. Reports Navigator Visual Map Service Request FAMIS Xi Home Quickpicks My Documents Assessments McGill DM - Read Only 3 B Deficiencies MCG FMM View Deficiency Projects Capital Projects Work Orders 3. Folders display. Click the + next to Service 🐯 McGill Requests (or double-click) and double-click Reports Navigator Visual Map Service Request Service Requests. FAMIS Xi Home Quickpicks * Menu My Documents If you have set up Service Requests as a - 🗿 🖻 Maintenance Management Admin favorite: *i*N; Configuration • Click on the down-arrow next to Tip - Equipment - Facilities Quickpicks * - Invoices Job Costing Favorites Labor Quickpicks Select Favorites • - Materials - Preventive Maintenance The favorites that are already set up - Projects - Purchasing display - Schedules Service Requests Select Service Requests . -Service Requests -Service Request Work Bench Procedures Library Refer to Set up your favorites section for Reports details on setting up favorites. Type All Menu Items -Go



- 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 an ext to the **Requestor** field.

FAMIS XI St McGill Reports Navigator Visual Map Service Re 4 💁 🖻 🚔 1 🦞 🗑 🖸 1 🗟 🗳 🗑 1 🗟 🖉 🗑 1 🖓 Service Request Quickpicks RK IN MCCONNELL BASEME SR Nu Parent WO **Capital Project** Attributes Other Related Work Routing HUTTON ALEXANDER Requestor 514-398-1212 Telephone Alternate Req AR Te Request Date 22-NOV-2018 3:15PM Conv to Proj. Create WO set Clas Dat Audit Convert to CP. IDC EVENTS Туре Priority Crew gned To SCHEDULED Order Ticket

- 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.

It's a good idea to first ensure that the client exists before creating the service request. See <u>Ensure client exists</u> for details.

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



eports Navigator	Visual Map Service Request	Viecone JC
- 🟦 i 🖹 🚔 i 🖻		
Quickpicks 💌	Service Request	
	SR Number SR0002115 WORK IN MCCONNELL BASEMENT	
	Parent W0	
	Capital Project	
	Main Attributes Other "Related Work Routing	
		Billing
	Telephone 514-398-1212 Building 131	Work Plan
	Alternate Reg	Check Dups
	All Telephone Room Concerned State 22,NOV-2018 3:15PM	Conv to Proj
		Create WO
	Asset Class	
	Equipment	Dates
	General Information	Audit
	Type IDC EVENTS Non-Avail Time	Convert to CP
	Priority 4	
	And an	



Note

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

Type:

- a. Click an 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.



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.



Find Criteria		TT OBJECT		
		_	Include Alias 🔽	
Find [Use WildCard	Find
Ruildings			— Building Details	
Building Description	Building ID		Zor	NO SE
MACDONALD ENGINEERING BU	130	- <u>-</u> -	Building Manag	er
MACDONALD HARRINGTON BUI	118		Phone Numb	er
MACDONALD STEWART LIBRAF	170		Alias Code	Aliases
MARTLET HOUSE	242		FRENCH DES	PAVILLON MCCONNELL (GÉNIE)
MCCONNELL ENGINEERING BU	131		BUILDING C	ENGMC
MCCONNELL HALL	221			
MCCONNELL RINK	105			
MCCORD MUSEUM	186	-		



 The Billing-3 screen displays. Click the down-arrow to select the appropriate billing type. Refer to the <u>Glossary</u> 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.

Clear Account Cancel Tenants Dates Audit
Clear Account Cancel Tenants Dates Audit
Details 2000/000000000000000000000000000000000
Index 906854

-

Service Request

Edit Query Record Attachments Help

f

f Accou

Chart

la des			
Index	5		
Description			
Fund	906854		
4 Organization	00371		6
Account	700001	.	-(1
Program	483W		\sim
Activity	000000		
Location	000131		
16 OK	Cancel	1	

Note: if your Fund/Organization/Program 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.



Note

- 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.

	0	Enter more than one FOAPAL when clients
IJ		are sharing costs.
NOLE	0	Ensure that the % add up to 100%.
	0	If you only have 1 FOAPAL, you do not have to enter the % field.
	0	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.



	Second		
Edit Query Becord Attachments	Help		
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Billing Type EVT IDC FIRM PRICE	• •		
Bill by Fund	Hold Reason		-
neodicin			
- Account Details			
Account	% Order Last Fund Limit Amo	unt Billed Funding Amount	1
	0-00013 100.00 17a		(A)
906854-00371-700001-483W-000000			
906854-00371-700001-483W-000000			
906854-00371-700001-483W-000000	(17e)		
906854-00371-700001-483W-000000	17e		
906854-00371-700001-483W-000000	17e		

dit Query Record Attachments Help					
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EVT IDC FIRM PRICE		-			
19		Peason			
Accounting hold					
Account Details					
Account	% 0	rder Last Fund Limit	Amount Billed	Funding Amount	1.1
06854-00371-700001-483W-000000-0001	100.00				[A
					[
					18
	i i				i i
				[- 1
				 All Anno 1 	Þ



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

SR Number	SR0002115	WORK IN MCC	ONNELL BASEMENT		
Parent WO					
Capital Project					
Deficiency Project					
Main Att	ributes Ot	her Related V	Vork Routing		
Requestor Informa	tion		C Location		
Paguasto	HUTTON AL	EXANDER	Site	1	Billing
Telepho	ne 514-398-121	2	Building	131	Work Plan
Alternate R	eq		Floor	0	
Alt Telepho	ne		Room		Check Dups
Request D	te 22-NOV-201	8 3:15PM	Zone	SE	Conv to Proj.
)			Create WO
set Class					E Dates
quipment				ũ	- Caros
General Informatio	n —				Audit
Tana IDC	EVENTS	Nor	n-Avail Time		Convert to CP.
	No. 7 No. 7 W 1 W				

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

Remember to occasionally save your service request and work request.

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

	SR0002115	WORK IN MCCONNELL BASEMENT			
Capital Project					
eficiency Project			_		
lain Att	ributes C	ther Related Work Routing			
Consideration and Construction		(21)			
		\bigcirc			
Contact Date		v	VO Number	W0069571	
			WO Status	CLOSED	
Tracking 4					

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

沁

Lip

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

SR Numb	er SR0002	2115	WORK IN MCCONI	NELL BASEMEN	T		
Parent	NO						0
Capital Proje	et .						
eficiency Proj	ect						
			1				
Main	Attributes	Ot	ther Related Worl	k Routing			
Contact Date	•			22	W0 Number	W0069571	- Cut



Note

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.



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:

(custodial ops)	→ fund 163900
(events support)	→ fund 163400
(groundsmen)	ightarrow fund 162000
(building services)	ightarrow fund 163000
	(custodial ops) (events support) (groundsmen) (building services)

 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 <u>total estimate</u> and press Tab. This will update the **Total Estimate** field.
- 32. Close the Estimates screen by clicking on the X.



- 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
- Click **OK** to return to the Work Order Attachments screen.
- 39. Close the **Work Order Attachments** screen by clicking on the **X**.













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 <u>open</u>, 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 <u>Ensure client exists</u> 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 <u>Create a Child Work Order</u> section.

Create a Service Request				
1. Click the Navigator tab at the top	CGill I FAMIS Xi Portal Visual Map Service Request			
2. From the Menu tab, click on the down-arrow and select Maintenance Management Admin.	Reports Navigator Visual Map Service Request Quickpicks FAMIS Xi Home Menu My Documents Deficiencies McGiil DM - Read Only Deficiency Projects Mantenance Management Admin McG FMM View 2			
 Folders display. Click the + next to Service Requests (or double-click) and double-click Service Requests. If you have set up Service Requests as a favorite: Click on the down-arrow next to Quickpicks Select Favorites Select Favorites Cuickpicks The favorites that are already set up display Select Service Request Refer to Set up your favorites section for details on setting up favorites. 				



4. The	Service Request form displays. Click in the	Renords Newtoning Snare Snare Survey Visual Man Service Request SS Admin Navigator Test
field	d. Type the event description.	
5. Fro Rec	m the Main tab, click 😡 next to the Juestor field.	Cuickpicks Service Request SR Number Parent W0 Capital Project Deficiency Project Main Attributes Other Related Work Routing
Note	It's a good idea to first ensure that the client exists before creating the service request. See <u>Ensure client exists</u> for details. New clients will have to be created by staff with administrative privileges. Contact your administrator.	Requestor Information Image: Construction Requestor 5 Site Image: Construction Attrenate Req Image: Construction Attrenate Req Image: Construction Request Date 14-DEC-2018 9.26AM Zone Image: Construction Construction Image: Construction Type Image: Construction Type Image: Construction Type Image: Construction Status Assigned to Print Work Order Ticket Image: Construction
6. The	Requestors window displays. In the Find field:	
a. b. c. d.	Enter client's last name, surrounded by %. You can type the name in upper-case or lowercase characters. Click Find. If more than one person has the same name, select the client's name. Click OK. If only one person with that name exists, the person's name displays in Requestor field. a. Client Telephone and Request Date display.	Find(%SABADOS% 6a Requestor Department AALAMIAN, ARMAN 00220 AARON, HELEN 00290 ABABOU, MOHAMMED 00035 ABADI, MILENE 00023 ABADIR, CHRISTOPHER 00220 ABADIR, SHVIA 00228 ABADIR, CHRISTOPHER 00228 ABADIR, SHVIA 00228 ABADIRO, ERVIN 00278 ABANICO, ERVIN 00278 ABANITO ELORIDA NOF 00364 Gb Eind Gauckpicks </td
	b. You may enter/update the telephone.	Capital Project Deficiency Project Main Articitary Other Requestor Sequestor Sequestor Sequestor Sequestor Billing Discription Billing Point Work Picture Request Date Status Priority Non Non Ant Telephone Request Date Id-DEC-2018 9.26AM Ceneral Information Convert to Dates Ceneral Information Type Non-Areal Time Priority Status Priority Print Work Order Tic



- Enter the Location information. Enter the fields 7. 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.
- Enter the General Information section. 8. 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 a 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 la next to the Status field.
- b. Select 'SCHEDULED' (this triggers a work order)
- Click OK c.
- Click **Save** from the Navigator tool bar. 9.
 - SR Number for your request is now created. a.
- 10. Click **Billing** from the right.



The **Zone** field is automatically entered.









11. The Billing-3 screen displays. Click the	Service Request Com
down-arrow to select the appropriate	// Billing-3 - 20000000000000000000000000000000000
Billing Type . For a definition of this type,	Eile Edit Query Record Attachments Help
refer to the <u>Glossary</u> .	
	Bill by Fund Accounting Hold Reason
a. EVT BILLABLE (use for progressive standing orders)	- Account Details
	Account 12 % Order Last Fund Limit Amount Billed Funding Amount I
12. Click Account.	
	OK Clar Account Cancel Tenants Dates Audit
	Record: 1/1
13 The Account Details screen displays. Enter the	Sanica Paquast
FOAPAL(s) to be charged for internal clients.	Account Details
Enter these fields or click 😡 to search:	Chart of Accounts
	Index 151802
c. Chart of Accounts:	Description
'1' for internal clients	
'EXT' for external clients (e.g. student associations)	Fund
	Account
d. Index:	Activity
enter of select the fund	Location
	OK
14 Press Tab Most of the FOAPAL fields will be	
automatically filled. The Description field will	
enter a description for the fund.	
·	Service Request
15. Enter the appropriate Account for the service	Account Details
being requested. Contact the Administrator if	Chart of Accounts
you do not know what account to enter.	Index 151802
	Description PRODUCTION 14
16. CIICK OK . It will only be saved if FOAPAL exists.	Find (151002
	Organization 00283
do not display, this means that either:	Account 700069
a. FOAPAL is invalid	Activity 000000
b. FOAPAL was created today and you will	
need to wait until tomorrow to enter it.	OK Cancel
Take note of the Work Order # . If it is	
still not valid the next day, contact the	
provided by them is not valid.	











 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 	Reports Navigator Space Survey Space Survey Visual Map Service Request SS Admin Navigator_Test File Edit Guery Beood Bachments Beip Work Outcurcts Image: Control of
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	Main Attributes Tasks Crews Parts Tools PO's Routing Readings Closing Asset Asset Image: Status
 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). 	U 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
29. Click Save 🛅 . Note that <u>no estimates</u> are required for this type of work order.	work order for the other crew(s).
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.	







 38. To see a summary of the actions performed in the Work Order, click on the Routing tab. <i>This shows the user(s) that performed the action on the work order, and the date and time that this was performed.</i> 39. If you are using additional crew(s), create a child work order for each crew. This is explained in the <u>Create a Child Work Order</u> section. 40. Click the Home icon . 	Work Order W0 Humber W0069582 FREE SKATING OPEN TO PUBLIC 38 Parent W0 38 0 Main Attributes Tasks Crews Parts Tools Po's Routing Bate User Assigned To Status Comments 14-DEC-2018 9:43AM FAMIS OPEN Image: Comments
Image: Second system 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'. 	



🐯 McGill **FAMIS Xi Portal** Add miscellaneous costs HE JOEROS Reports Navigator Visual Map Service Request 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: 🐯 McGill Reports Navigator Space Space Survey Space Survey Visual Map Service Request SS Admin Navigator Click the **Navigator** tab at the top. 1. FAMIS Xi Home Quickpicks + 2. Double-click the Job Costing folder. Menu My Documents 2 - 🗿 🖻 Maintenance Management Admin 3. Click Miscellaneous Costs. - Configuration - Equipment - Facilities - Invoices 2 Job Costing Capital Project C (If FCP not installed) gurat - Capital Projects -∃Journal Entries -∃General Ledger - Miscellaneous Costs Labor - Materials - Preventive Maintenance Projects - Purchasing Type All Menu Items -Go The **Cost No.** field displays **ASSIGN**. 4. FAMIS XI F The McGill Reports Navigator Space Space Survey Space Survey Visual Map Service Request SS Admin Navigator_Test Eile Edit Query Record Attachments Help 5. In the Cost Type field, type 'EVT MISC' and 4 💁 🖻 🚔 1 🦞 🦉 🗮 🖸 1 🗟 🕲 🔂 🔛 1 🗃 🖉 🖼 🖓 press Tab. Miscellaneous Costs Quickpicks eral Recurring Information Att Dates 6. The Trans Date and Description fields **ASSIGN* Cost No. 7 EVT MISC Cost Type are automatically filled in. If you wish, you may W0 Number Trans Date 17-DEC-2018 update the text in the **Description** field. 6 Description EVENTS MISC COSTS arkup Percen 7. Enter the work order number in the UM FA larked up Amt Qty Send to GL V WO Number field. nerated from rring Cost No. ant 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. 	FAMIS X Reports Navigator Space Survey Space Survey Visual Map Service Request SS Admin Navigator_Test Elle Edd Query Becord #tachments Help Weiter Match Image: Additional State Stat
 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. 	Exercise for the formation formation for the formation formation formation for the formation formation for the formation formation for the formation formation for the formation formation formation for the formation formation formation for the formation formation formation formation for the formation formation formation for the formation formation for the formation for
13. Right-click on the WO Number field and select	
Cost Summary.	Reports Weidetor Space Space Survey Space Survey Visual Map Service Request SS Admin Navigator_Test File Edd Query Brood Attachments Help Cuickpicks Miscellaneous Costs General Recurring Information Attributer Dates Cost Hits (MC0311274 Cost Type EVT MISC) With Hender (MC0311274 Cost Type EVT MISC) Generated from Recurring Cost Help (Information View) Ref Cost Streed (Information View) Ref Cost Help (I



 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. 	FAMILS Xuesses For Survey Space Survey Visual Map. Service Request. SS Admin. Navigator_Test. Reports Vavigator Space Survey Space Survey Visual Map. Service Request. SS Admin. Navigator_Test. Ele Edit Query Becord (Blachments Help Image: Colspan="2">Image: Colspan="2" Summary Vork Order Cost Summary Vork Order Cost Summary Image: Colspan="2" Image: Colspan="2" Summary Image: Colspan="2" Reput: Material Image: Colspan="2" Image: Colspan="2" Image: Colspan="2" <
 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 	Wildstein Space
Close the Standing Work Order If the standing progressive order has to be closed because there is no longer a need for it:	











Create a Child Work Order

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









 In the Contingency field of the Estimates screen, enter the <u>total estimate</u> for this crew and press Tab. This will update the Total Estimate field. Click Save Click save 	Work Order Work Order Estimate Work Order Estimate Betailed Estimate Primary Labor 00 00 Labor Labor Material Invoice Estimate Contingenzy 525.00 12 00 Detailed Estimate Nource Equipment Stimate 525.00 12 00 Detailed Estimate No Statimate Statimate 525.00 12 00 Detailed Estimate No Apply Estimate estimate Crew Size Externation Building 100 Print Ticket On Heat Batch Run
 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. <i>Click OK if you get an error message.</i> 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. 	Work Order Work Order Attachments - W0069591 Elle Edit Query Becord Attachments Help Image: State Sta
Before you select the file, access it and save it as one of these allowed file types by using File > Save As: o pdf o doc (Word) o docx (Word) o xlxs (Word) o xls (Word) o txt o msg (email) o dwf (Autocad) o dwg (Autocad) Ensure that the file name is no longer than 30 characters, with no spaces.	I View 17 New Edit Dip Scan DIP Attach View Document Type DOCUMENT (DIFFERENT DOCUMENT TYPES) 18 Description EMAIL Document C:\Users\jderos\Desktop\test.msg Browse 19 OK Cancel



20. You v Attac Attac Attac	will return to the Work Order chments screen with the document you hed indicated. Close the Work Order chments screen by clicking on the X . 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.	Work Orde	r chments - W0069591 Becord Attachments Help Cuments Mail MERIDIAN Options tename, URL, etc.) New Edit	Source WO Dip Scan DIP Attach	
21. You v Click	will return to the Work Order screen. the Save icon	Reports Wavestow Series	acc Space Survey Space Survey Visual Map Service Requests terments Units Work Order Wolk Order Main Astebutes Tasks Crews Parts Tools Fask tel ENTER IN EDETALS OF THE WORK ORDER HERE - BY DONG A C ENTER OR COPY & PASTE DETALS FOR THE CHILD WORK ORDER I Core Comments	PO's Routing Readings Closing	Connected as famil@dama.mcpit ATTACHMENTS Notes (0) Documents (1) E-Mail (2) UNFORMATION Current Schedule Audit REPORTS Wion: Order Ticket
Note	After the event is completed, both the parent work orders and the child work orders have to be <u>closed</u> . 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.

4		
1.	when you are on the parent work order,	McGill FAMIS XI
	click Related WO from the right	Reports Navigator Space Space Survey Space Survey Visual Map Service Request SS Admin Navigator_Test
		Elle Edit Query Record Attachments Help
		Quickpicks Vork Order
		W0 Number W0069576 HEALTH FAIR
		Parent W0
		Main Attributes Tasks Crews Parts Tools PO's Routing Readings Closing
		Asset
		Equipment
		General Information Current Status / Dates Tracking 1
		Type EVENTS Status OPEN Request
		Method Start Date 30-NOV-2018 Tracking 2 Related WO 1
		Assigned To
		Billing
		Crew CUST
		Creat CUST Building 103 Dates
		Est Way Current Est Wrs
2	The list of (Children of Current Work	
2.		
	Order ' display. Here, the related work	Reports Navigator Space Survey Space Survey Visual Map Service Request SS Admin Navigator_Test
	order(s) display.	 4 1 1 2 3 1 7 8 3 0 1 3 8 3 1 1 2 2 2 3 1 7
		Work Order
		Guickpicks Volk Orden
		Elle Edit guery Record Attachments Help
		Parent of Current Work Order W0 Number W0 Status Description Crew Start Date Due Date
		Children of Current Work Order
		W0069581 OPEN EVENT SUPP 13-DEC-2018 27-DEC-2018
2	Class this window hy slishing any the M	
J.	Close this window by clicking on the X.	
	You are back on the parent work order.	



Find the Work Order





Cancel a Work Order

To cancel your work order:

1.	Access the Work Order.	Constant Service Request SS Admin Navigator_Test Ele Est gave Recard Administ He
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.	Image: Section of the section of t
	a. Press F7 or click on From toolbar. (fields will turn blue)	Asset Asset Class Exploses Explose
	b. Enter the WO Number field.	Outage Cless Completed Nn. Analasto Pinney Laker Estimates Correct Coll Site Control Dates Correct Coll Nn. Analasto Dates Dates Control Dates Correct Coll Nn. Analasto Dates Dates Control Dates Dates Dates Correct Coll Control Population
	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	Work Order Connected as famile@cfam	iis mogill ca
	Ticket from the right.	W0 Namber Parent W0 M0009568 TREE SKATING CORENT OF PLOUDS Main Attributes Tasks Point Main Attributes Tasks Creve Asset Equipment Image: Status Point Status OPEN Tracking 1 Ubrary Priority General Information Current Status Detes Status OPEN Tracking 1 Ubrary Priority General Information Current Status Detes Status OPEN Tracking 1 Ubrary Metrid Status Status OPEN Uncaste WO Outgoe Class General Information Completed Billing Privary Labor Location Treet Time Estimates Over UST Location Dates	9 ot
2.	The Print screen displays.	Print - W0069568 Report Criteria W0 Number W0069568 All Marked To Print For Crew AlL All Marked To Print For Craft All Marked To Print For Assigned To All Marked To Print For Assigned To All Marked To Print For Assigned To	
3.	Click the down-arrow next to Type field to select the print destination (e.g. Screen)	Complete Note ✓ Include Secondary Labor Oestination Type Screen Set As Default	
4.	Click Print .	Print Exit Record: 1/1	



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	TAMIS XI Portal
2.	From the Menu tab, click on the down-arrow and select Maintenance Management Admin.	Reports Navigator Visual Map Service Request
3.	Folders display. Double-click Work Orders.	FAMIS Xi Home
4.	Double-click Work Order Cost Summary	Menu My Documents Maintenance Management Admin 2 Purchasing Schedules Schedules Schedules Service Requests Vendors Vendors 3 Close Route WOS Express Work Order Standing Work Orders Work Order Work Order Closing Work Order Ticket Work Order Ticket Reports - Active WO Reports - Active WO Reports - WO Invoices
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 <u>Find</u>	Type All Menu Items Go Work Order Cost Summary 5 W0 Number W0069527
	the Work Order section. a. Press F7 or click on ♥ icon from tool bar. (fields will turn blue) (# 1 = ● ♥ ♥ ■ ○ ○ ♥ ● ○ ○ ♥ ● ○ ● ● ● ● ● ● ● ● ● ● ●	Work Order Cost Summary W0 Humber M000000527 EMBA REVIEW SESSION Parent W0
	WO Number field.	Summary Labor Material Invoices Equip Rental Misc Costs Billed 6 Estimate Actual Committed Balance Labor00
	c. Press F8 or click on 🛸 icon from tool bar.	Material I 00 00 00 00 Print Invoices .00 .00 .00 .00 Dates Equipment .00 .00 .00 .00 Dates Contingency 312.00 .00 .00 .00 .00
6.	The Work Order Cost Summary screen will be filled in. The Summary tab displays the estimate.	Total 312.00 00 312.00



7. Click the Billed tab to see the billed amount.	Work Order Cost Summary	
	WO Number W0069527 EMBA REVIEW SESSION	
	Summary Labor Material Invoices Equip Rental Misc Costs Billed	
	Billing Date Account (7) Amo	unt
	20 NOV-2018 2:38PM 154060 00028-700069-1000-000000 000000 312	00 -
		78
	View Total Amount Billed 312	00



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. (수요! 러 을 내 文행을 이 다 한 국 다 I 당 점 점 일 I 군	Service Request SR Number SR0002124 HEALTH FAIR Parent W0
3.	The Service Requests displays.	Capital Project Deficiency Project Main Attributes Other Related Work Routing Requestor Information Reguestor Information Billing
4.	From the Main tab of the Service Request, click on the next to the Status field to change it from SCHEDULED to CANCELED . Select CANCELED from the Statuses list.	Telephone 5143361532 Alternate Reg Floor Alternate Reg Floor Alternate Reg Floor Request Date Floor Some SW Conre to Proj. Conre to Proj. Conre to Proj. Conre to Proj. Conrect Information Type Events Priority A Hon least Time Convert to CP.
6.	Click OK	Status SCHEINLED Assigned To
		Statuses Status Find % Status REOUESTED WAREVISION VAREVISION CONV CP CONV CP CONV PROJ ScheDULED 6 Eind QK



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.	Reports Navigator Visual Map Service Request
		Reports Navigator Visual Map Service Request Quickpicks FAMIS Xi Home Quickpicks Menu My Documents Assessments McGill DM - Read Only Image: Comparison of the second of t
3. 4.	Folders display. Double-click Work Orders Double-click Work Orders .	Reports Navigator Space Survey Space Survey Visual Map Service Request SS Admin Navigator_Tes
		Uuckpicks FAMIS AL HOTTE Maru My Documents Maintenance Management Admin Image: Comparison of the second



5. Enter the work order number in the	TAMIS XI
WO Number field and press F8. If you do no	Reports Navigator Space Survey Space Survey Visual Map Service Request SS Admin Navigator_Test
know the number, go to the Find the Work	
Order section.	Work Order Wolkunder W0009992 FREE SKATN/S OPEN TO PUBLIC
a. Press F7 or click on 👫 icon from toolba (fields will turn blue)	IT. Perent W0 Main Attributes Tasks Crews Parts Tools PO's Routing Readings Closing Asset Asset Equipment Equipment
b. Enter Work Order Number in the WO Number field.	General Information Current Status / Dates Tracking 1 Library 6 Type EVENTS Status OPEN Tracking 2 Request Priority 4 Material Status OPEN Tracking 2 Request Method 0 Due Date 26-DEC-2018 Oreate WO Outrage Class Completed Hon-Available Create WO
c. Press F8 or click on 🗭 icon from toolba	Primary Labor Custion Travel Time Estimates Crew CUST Site Dates Crew Size Floor Dot Est lins/ Corrent Est lins Corrent Dates Current Est lins/ Print Ticket On Hest Batch Pain
6. Click Request from the right.	
7. The Request Information for the work orde	F Request Information - W0069582
displays. The service request number display	ys in Request Type Requester
the Request Number field.	Type of Request SERVICE Name SABADOS, JOYCE 8 7 Request Number SR0002130 Telephone 5143981532 8
8. Close this screen to return to the work orde	F. Department 00526 Mail Code Fax Number Deficiency Project Cellular Capital Project E-mail Budget Code Shift W Need to notify ?



Troubleshooting FAMIS

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

Browser		
 Ensure that you are using Internet Explorer as the browser. 	FAMIS only works with Internet Explorer .	
Enable Compatibility View	(a) Attps://qfamis1.ncs.mcgill.ca:8181/cas/login?se	
1. From Internet Explorer, go to the Tools menu.	File Edit View Favorites Tools Help 1	
2. Select "Compatibility View settings".	Construction Construction	
	Active/Filtering Filt connection problems Reopen last browsing session Add site to Start menu View downloads Ctrl-J Pop-up Blocker SanatSceen Filter Manage add-ons Compatibility View settings Subscribe to this feed	
 The website "mcgill.ca" should be listed in the box labelled 'Websites you've added to Compatibility View'. 	Compatibility View Settings Change Compatibility View Settings	
 If it's not, enter "mcgill.ca" in the box labelled "Add this website" then click the Add button. 	Add this website: mcgill.cal Websites you've added to Compatibility View: Remove	
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.		











Glossary

Term	Source	Description
Billing Type	Service Request	EVT BILLABLE – progressive standing order
	work 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	From the Location section - building code where
	Work Order	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) \rightarrow recovery fund 163900EVENT SUPP(events support) \rightarrow recovery fund 163400
		GROUNDS (groundsmen) \rightarrow recovery fund 162000 BLDSERV (building services) \rightarrow recovery fund 163000
Crew	Work Order	From the Primary Labor section. Selecting the right
		recovery fund.
		CUST (custodial ops)→ recovery fund 163900EVENT SUPP(events support)→ recovery fund 163400GROUNDS (groundsmen)→ recovery fund 162000BLDSERV (building services)→ recovery fund 163000
Dates	Service Request	Start Date – start date of event
	Work Order	Due Date – end date off event
Floor	Service Request Work Order	From the Location section - Floor code where event is held.



FOAPAL	Service Request	Chart of Accounts – use '1' for McGill
	Work Order	
		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 <u>crew</u> (e.g. custodial, event support, rental), you will have to create work orders with a <u>parent-child</u> 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	For the Service Request, use the 'Scheduled' status.



	Work Order	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
		 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.
Туре	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

	SR # Service Request Title	Click to access Work
Requestor —	Misc Cost Main Attributes Other Related Work Routing Purchase Order Main Attributes Other Related Work Routing Service Request Requestor Information Information Information Billing Work Order Requestor SABADOS, JOYCE Information Billing Maint Project Attemate Req Information Work Plan Work Order Closing Attributes Information Information Work Order Closing Request Date 30-NOV-2018 3:14PM Information	Click for Billing Location
Type Priority — Status	Asset Class Equipment Type EVENTS Non-Avail Time Priority 4 Crew CUST Status SCHEDULED Assigned To Print Work Order Ticket V	

FAMIS Service Request – Billing

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

	Service Request Con				
	Image: Stress of the second state in the second state i				
Add	- Account Details				
FOAPAL(s)	Account % Order Last Fund Limit Amount Billed Funding Amount I				
	199855-00380-700069-7200-000000 50.00				
	OK Clear Account Cancel Tenants Dates Audit				







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 I <u>T Support</u> – by email, telephone	For any other issues:
	Email: <u>itsupport@mcgill.ca</u>
	Call: 514-398-3398

