



## **FF Standard Operating Procedures**

A guide to using Facility Focus

A product by Asset Works, Configured for the University of West Georgia

University of West Georgia  
Campus Planning and Facilities  
Facilities Support Team for Technology

## Work Requests

Using work request entry you can document work orders by performing the following tasks:

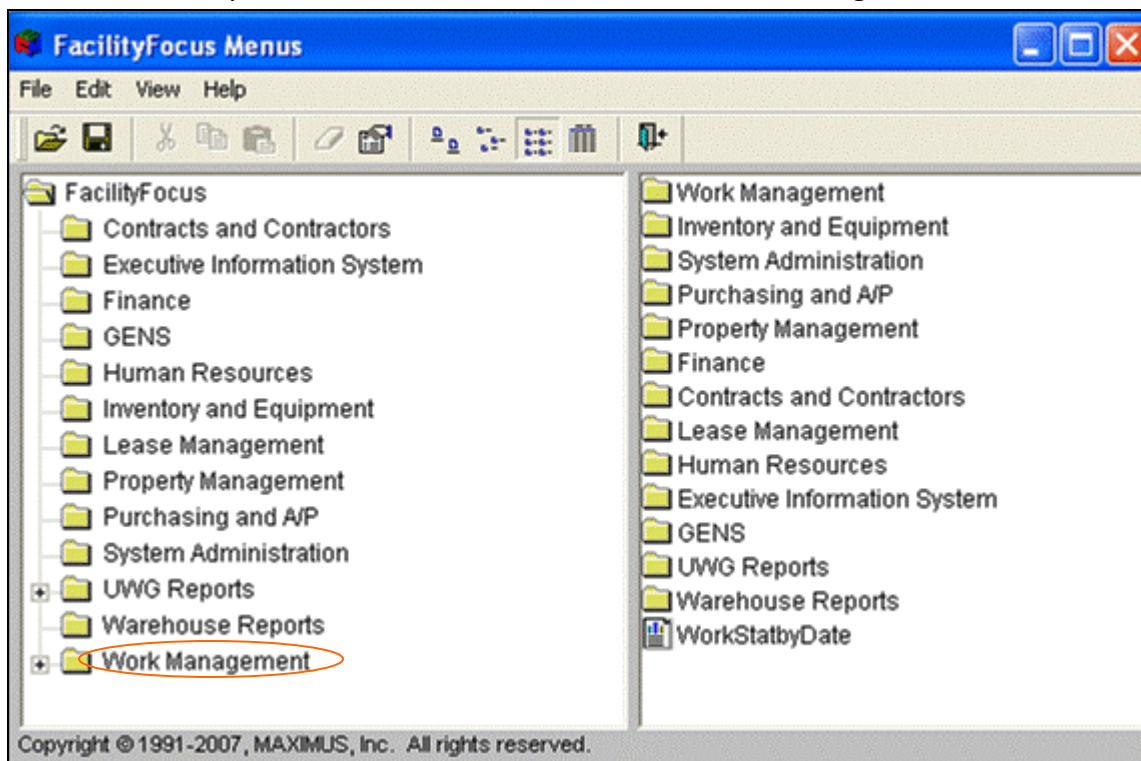
- Describing the nature of the work.
- Assigning the shop(s) responsible for resolution.
- Indicating the account(s) used to finance the work requested.
- Dividing the work into phases. (all work requests have at least one assigned phase)

Using this screen, you can create a new work request, find any existing work requests for review, or edit/update existing work requests with current data.

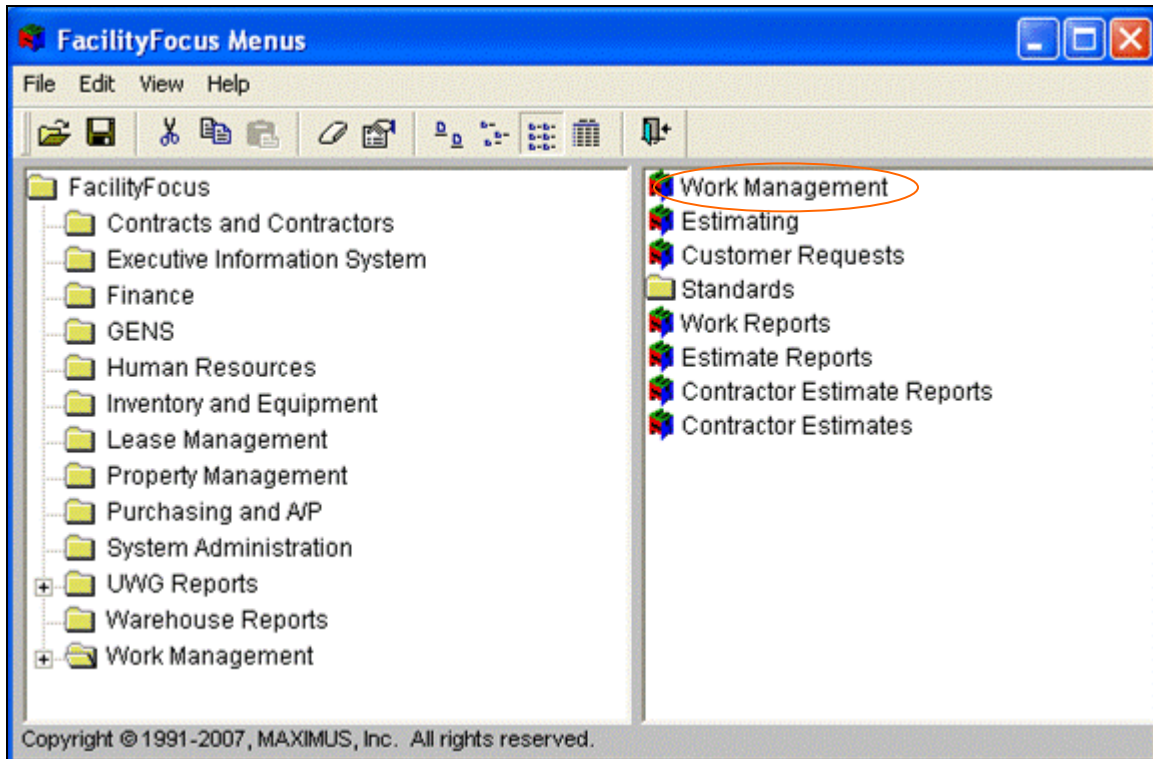
### Steps for Entering a Work Request:



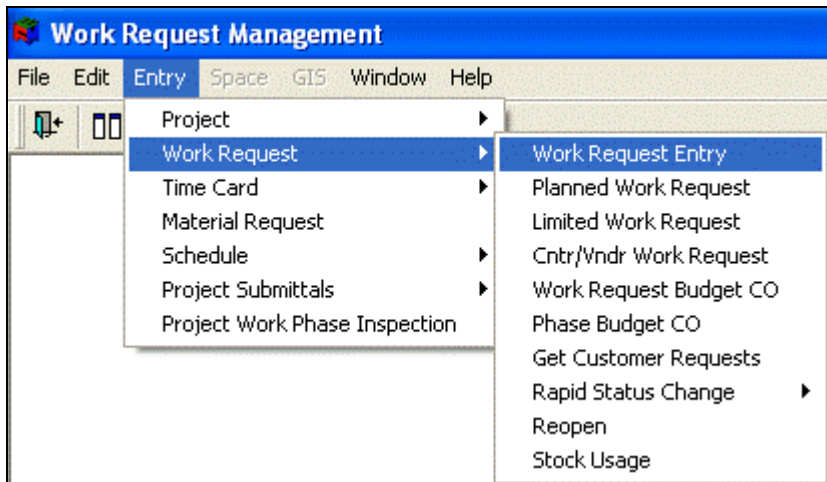
1. Double click on the PRD FacilityFocus icon.
2. Type in Username and Password.
3. On the Facility Focus Menu, left click once on the Work Management folder.



4. Double-click on Work Management. (on the right side)



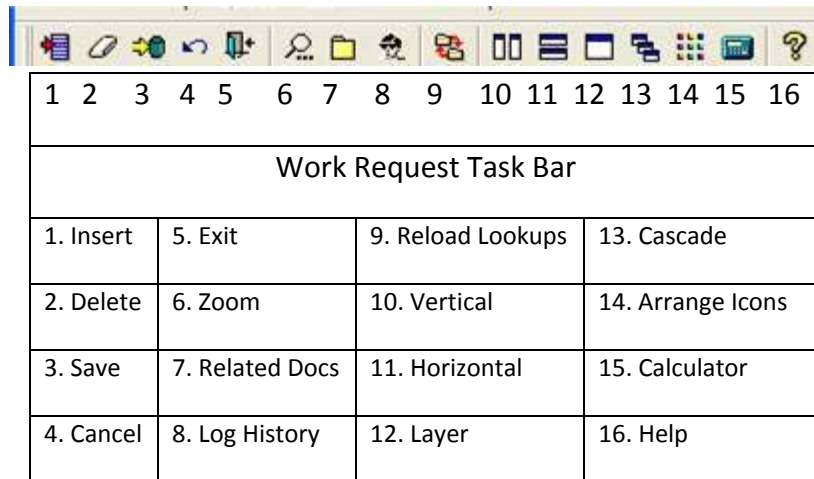
5. Left click on entry in the top menu bar.
6. Scroll down to Work Request and over to Entry.
7. Left click on Work Request Entry.



8. Click Insert icon in the top task bar.
9. Fill in all of the information required in the Work Request.
10. Fill in all required Phase data.
11. Repeat required data for each additional Phase.
12. Click Save icon at the top of the task bar.

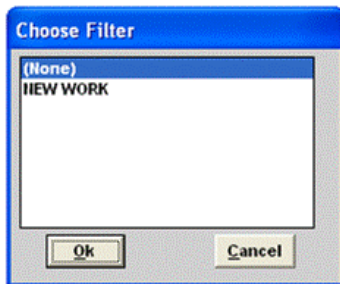
### Steps for Editing a Work Request:

1. Go to Work Management Module. (follow Steps for Entering Work Request)
2. Retrieve Work Request.
3. Make desired changes/updates to the Work Request.
4. Save.

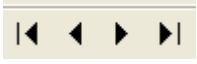


### Retrieving Work Request

1. Click Search icon. (top task bar)
2. If filters are available then choose desired filter and click "OK". This will pull up all work requests that meet criteria previously defined in the filter chosen.  
---OR---
3. Choose "(None)" if you would like to search by Work Request number or other desired criteria.



4. Input the search information such as Work Request Number into the appropriate field(s)
5. Click the Search icon. (top task bar)

If your search returns multiple results, the use the browse buttons  above the Work Request to scroll through the results.

## Required Work Request Information

The screenshot displays a 'Work Request' form with the following fields and values:

- Customer:** ARCHAEOLOGY WAREHOUSE, Org: ARCH, Ent Date: 12/4/2008 15:13
- Name:** (empty), Login: MLW
- Phone:** (empty), Email: (empty)
- Contact:** CZOCHARA, BONNE
- Phone:** 96303, Email: bczochar@westga.edu
- Work Req:** 08163607, Title: BUILD CART
- Due:** 12/14/2008 00:00:00, Project: (empty), Group: (empty), Fiscal Yr: 2008
- Type:** C, Category: REACT, Status: 00 OPEN
- Region:** LWG, Facility: CAMP, Property: ARCHEOLOGY
- Phase:** 001, Est Start: 12/4/2008 15:13:53, Est End: 12/14/2008 0:00:00
- Desc:** BUILD CART
- Floor:** (empty), Location: (empty)
- Problem:** 502, Priority: ROUTINE, Status: 80 SCH
- Shop:** CARP, Work Code: WOODWORKING, Labor Class: SHOP

An inset window titled '<Account Distribution>' shows the following details:

- Work Req:** 08163607, **Phase:** 001
- Start Date:** 12/16/2008 9:28:45, **Expire Date:** (empty)
- Account:** 20000 1013110 12100 62000 219, **Sub Code:** 71430
- Offset Acct:** 10000 9910300 17100 11000, **Sub Code:** 14100
- Company:** B/F, **Department:** FG, **Org Code:** FG
- Percent:** 100.00, **Encumber:** 0.00
- Region:** LWG, **Facility:** CAMP, **Property:** ARCHEOLOGY

- Customer- Department of individual submitting request (zoomable)
- Contact- Name of individual submitting request (Last name, First name)
- Contact Phone Number
- Contact Email address- Email address of individual submitting request
- Work Request Number- Assigned by system
- Title- A brief description of work to be done. No more than 40 characters allowed in this field. The text box located at the end of this field is reserved for special communication (i.e. reasons for cancellations, documentation, etc.).
- Type- Customer Funded, Facilities Funded, or Design and Construction
- Category- general category of work to determine available work codes

- Status- determines the overall status of the work request
- Property- General location of the work, i.e. Building (zoomable)
- Location- Exact location of the work, i.e. room number
- Account Distribution- Account number of the appropriate department

### **Adding Additional Phases**

- Each work request will have at least one phase; some might involve several phases. The field will default to 001 upon initial entry and incrementally increase as additional phases are entered.
- To add additional phase, place cursor in the “Phase” box and click the insert icon in the task bar.
- Fill in required information for phase.
- Click Save icon. (top task bar)

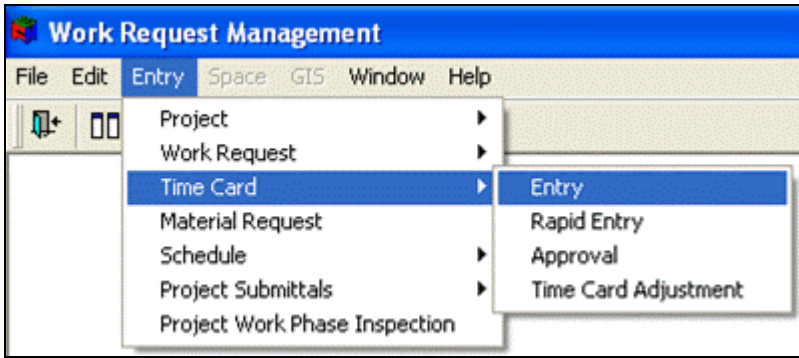
### **Time Cards**

This screen is used to enter employee work hours for a single shop person in a single shop on a given work date. It can track time for one or more multiple work requests. Time cards cannot be charged against work requests until the work request is entered into the system. Note: Time cards cannot be edited after they have been approved.

Labor charges that display on the line item reflect the number of hours entered multiplied by the Active Labor Rate defined on the Shop Person Screen in System Administration.

#### **Steps for Entering a Time Card:**

1. Go to Work Management Module.
2. Go to Time Card Module.
3. Enter Time Card data.
4. To add additional entries to the current time card, either click the Insert icon or press the F4 key on your keyboard and repeat step 3.
5. Click Save icon.



## Description of Time Card Data Fields

- **Shop** – Employee’s assigned workshop. If you know the Shop Person code you can enter it in the Shop Person field and press the enter key. This will automatically fill in the Shop field. When the user enters a time card, skips the Shop field and enters a Shop person, the Shop field defaults to the first shop that the user is assigned and the user is active for the time card date.
- **Shop Person** – Shop Person who performed the work. Zoom or key the field to select an employee.

- **Work Date** – Date on which the work occurred. You can change the work date by zooming the field or typing the date in the field.
- **Time Type** – Designates the pay rate (i.e. Regular, Overtime, Leave, etc). Select from the drop down list. Note: If you wish to retrieve all the open Work Request Phases assigned to this Shop Person instead of entering them one by one, skip ahead to the instructions in the table for the Get Work Requests button.
- **Work Request & Phase** – Work Request and Phase on which the Shop Person/employee worked for the specified Work Date (whether the job is complete or not). Note: Entry of Work Request and Phase will automatically fill the Description, current Phase Status, Labor Class, and Work Code fields.
- **Labor Class** – Defines the employee role within the company structure, such as, supervisor, shop person, or casual labor.
- **Actual Hours** – Hours (displayed to the tenth of an hour) spent on the job whether completed or in progress. This is a free-form numeric entry field. Key in a numeric value. Once the record is saved, the System calculates the Labor Charge and displays Labor Charge and Billing Rate.
- **Work Code** – Identifies the specific task to be accomplished as defined on the work request. A value may already appear here, but can be edited if necessary. Zoom to select.
- **Description** – Description of Work Request. Auto fills when Work Request is selected.
- **Phase Status** – Status of Work Request Phase. Select from drop-down list, if necessary. A change in this field will only change the Phase Status on the appropriate Work Request and only take effect after the Time Card is approved. The Phase Status will only change if the Work Request Phase Status has not changed since the entry of the Time Card.

## **Material Request**

Sometimes when a work request is processed, the supervisor may determine that extra materials will be needed to complete the work. The supervisor may determine that the amount needed exceeds the limit set by purchasing to use petty cash. When this happens, then a materials request must be submitted. A materials request may be submitted for items in the warehouse (in-stock items) or items from an outside contractor/vendor (non-stock items).

Once a material request has been submitted, it may be in one of the following statuses:

**OPEN** – The materials request has been entered and is awaiting finalization. This is the only status that the material request may be edited.

**FINALIZED** – The materials request is ready to be processed into either a pick ticket for warehouse items or a purchase order transaction.

**CLOSED** – If a materials request has been finalized and is incorrect, then the materials request must be closed and resubmitted. This is also used once materials have been received and materials request is complete.

### Steps for Entering a Material Request:

1. Go to Work Management Module.
2. Click on Entry in the top menu bar.
3. Drag mouse down to “Material Request” and click.
4. Click the Insert icon.
5. Fill in required global data.
6. Fill in required item data.
7. Hit the Enter key to enter additional items.
8. Repeat required item data for each additional item.
9. Click the Save icon.

### Required Global Data for Material Requests

The screenshot shows a software window titled "Purchase/Material Request (Cascade \_i\_pre\_e)". The window contains several input fields and buttons. The fields are: "Material Req" (text box), "Req Code" (text box), "Status" (drop-down menu), "Description" (text box), "Work Req" (text box), "Phase" (text box), "Date Needed" (text box), "Requested By" (text box), "Placed By" (text box), "Date" (text box), and "Total Amt" (text box). There are also buttons for "Review", "Status", and "Ship To".

- **Material Request** – Number assigned to each Material Request placed. This number is automatically assigned by the system.
- **Req Code** – Free form entry field used to classify the material request.
- **Status** (drop-down box) – Status of the material request. Open which permits future edits, Finalized, which means that it is ready to be processed, which is to be done by authorized personnel, Closed, when all materials are received, and Cancelled, when the request is cancelled.
- **Description** – Is to be used to identify the proper shop name. Text box is used to describe the method of purchase and delivery.

- **Work Request** (zoomable) – User must enter proper Work Request to be associated with material request. (In order to expedite the process user should have work request and phase # available.)
- **Phase** (zoomable) – Phase of the work request for which materials are being requested. (insert appropriate phase)
- **Placed By** (auto-populate) – Displays the username, date, and time of person entering material request.
- **Total Amount** – Total dollar amount of material request.

### Required Information for In-Stock Items

Inv Flag	Inventory Part	Description	UOM	Unit Cost	Quantity	Sub Total
Comm Code	Supplier Part			Ven Cost		Issue Factor
Cntr/Vntr	Addr Code	Whse	Status	Qty Off		
1					0.0000	
			OPEN		0.0000	

#### Description of the above data boxes as they are listed from left to right:

1. **Line Item #** (auto-populate) – Automatically inserted by system and incrementally goes up as each item is added.
2. **Inv Flag** (drop down box) – Determines location of materials to be purchased. Inventory Flag options include:
  - a. **I** (In-Stock) - Items to be purchased from internal warehouse.
  - b. **N** (Non-Stock) - Items to be purchased from outside vendor/contractor.
  - c. **C** (Catalog) – This option is currently not used by CP&F
3. **Inventory Part** (zoomable) – Predefined inventory part you are requesting.
4. **Description** (auto-populate) – General description of item.
5. **Unit of Measure** (auto-populate) – Describes how the part is issued.
6. **Unit Cost** (auto-populate) – Cost per item.
7. **Quantity** – The number of items being purchased.
8. **Sub Total** – Multiplies the Quantity by the Unit Cost.
9. **Comm Code** – Commodity code (used by warehouse) is a user defined code that further identifies the part for inventory reports or records.
10. **Supplier Part** – Item as is known in supplier's inventory.
11. **UOM** – Unit of Measure.
12. **Ven Cost** – Displays the supplier part unit cost. It may automatically fill once the supplier part is selected.
13. **Quantity** – Number of items being purchased.

14. **Issure Factor** – Minimum amount of items that the supplier part issues as one group.
15. **Whse** (auto-populate) – Identifies the warehouse storing the inventory part or receiving the non-stock part.
16. **Status** – Line item status. A drop-down list allows you to set the status to “Closed”. Once the status is closed, the line item can no longer be edited.
17. **QTY OH** – Quantity released (for inventory) or received (on a purchase order). If the item is an inventory item, it displays the warehouse quantity on hand in all bins. If non-stock or catalog, the line item displays the ordered quantity.

### Required Information for Non-Stock Items

Inv Flag	Inventory Part	Description	UOM	Unit Cost	Quantity	Sub Total
Comm Code	Supplier Part			Ven Cost		Issue Factor
Cntr/Vndr	Addr Code	Whse	Status		PO Item Qty	
1	N				0.0000	
			OPEN			

#### Description of above data boxes as they are from left to right:

1. **Line Item #** (auto-populate) – Automatically inserted by system and incrementally goes up as each item is added.
2. **Inv Flag** (drop down box) – Determines location of materials to be purchased. Inventory Flag options include:
  - a. **I** (In-Stock) - Items to be purchased from internal warehouse.
  - b. **N** (Non-Stock) - Items to be purchased from outside vendor/contractor.
  - c. **C** (Catalog) – This option is currently not used by CP&F
3. **Quantity** – The number of items being purchased.
4. **Sub Total** – Multiplies the Quantity by the Unit Cost.
5. **Supplier Part** – Item as is known in supplier’s inventory.
6. **Description** (auto-populate) – General description of item.
7. **UOM** – Unit of Measure.
8. **Ven Cost** – Displays the supplier part unit cost. It may automatically fill once the supplier part is selected.
9. **Quantity** – Number of items being purchased.
10. **Issue Factor** – Minimum amount of items that the supplier part issues as one group.
11. **Cntr/Vndr** – Contractor/vendor from which item is to be purchased.
12. **Status** – Line item status. A drop-down list allows you to set the status to “Closed”. Once the status is closed, the line item can no longer be edited.

