FACILITIES MANAGEMENT

000 Introductory Training

U001: Navigating in COMPASS
# U001 NAVIGATING IN COMPASS

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INTRODUCTION TO COMPASS

What is COMPASS?

Facilities Management’s specially designed computerized maintenance management system that facilitates the business functions of the department including work order processing, labor entry, purchasing, accounting, work scheduling, equipment inventory, and preventative maintenance procedures to name a few.

The official name of COMPASS is FAMIS. However, COMPASS was the name selected for the system, which was specifically modified to meet FM’s unique business requirements.

C omputerized
O perations
M aintenance
P urchasing
A ccounting
S ystem
S oftware
INTRODUCTION TO COMPASS

- **Forms**
  Another term for a screen or window (examples: Labor Entry form, Work Order form)
INTRODUCTION TO COMPASS

- List of Values (LOV)
  A list of options available for a given field. To access the LOV for a field, click the down arrow or the double or triple dots next to the field, or while cursor is on the field, press the F9 key.
**INTRODUCTION TO COMPASS**

- **Workbench**
  A form which provides a summary list of similar records. A Workbench allows you to drill down on displayed records to view or perform some activity on the record. Associated with job role (examples: Buyer’s Workbench, Equipment Workbench)
Exercise 1

1. Double click the COMPASS icon on your desktop and the Logon form appears
2. Enter the Username and Password provided by your supervisor
3. Enter FM in the Database field
4. Click the Connect button
5. COMPASS Navigator Screen appears
LOGGING IN

Things to Remember about Passwords....

• Employee is responsible for username and password

• Close COMPASS and shut down computer daily

• Use a screensaver with a password

• Password must be at least 5 characters long (letters and numbers)

• Prompted to change password every 180 days

• Contact OIT at 1-HELP with password related problems
1. Access the **User Database Profile** form from the Navigator screen
2. Enter your old password, new password enter your new password again to Confirm the change
3. Click **OK** and your password is successfully reset if you can navigate to your next task.  **If you get an error message, follow the procedure again from the beginning. If it still doesn’t work, contact OIT at 1-HELP**
1. Maximum of 12 **Quick Pick** buttons can be arranged here. **Quick Pick** buttons take you directly to the form, report or website. Right click your mouse on the Quick Pick button area or a button and you can add, edit or delete buttons. You can only choose forms, reports or websites that you have been given rights to access.

2. Clicking here displays profiles you have been assigned. Some people are assigned various profiles while others are assigned one. Profiles are assigned according to job roles and what you will need access to in order to do your job.

3. The Navigator menu displays folders that contain forms, reports and website links you have access to. Click the + sign next to the folder to expand it or click the – sign to collapse it. Forms are indicated by a small computer screen, website links by a globe with a magnifying glass, and reports are indicated by a sheet of paper.

4. Use these icons to expand or collapse all the folders on the Navigator menu at once.

5. Choose the **Type** by clicking the **LOV** button; this will change the display of Navigator menu folders to include:
   - ALL MENU ITEMS
   - FORMS
   - REPORTS
   - WEB PAGES
TOOL BAR FUNCTIONS

- Enter Query Mode
- Execute Query
- Count Records
- Cancel Query
- Cut
- Copy
- Paste
- Save /Commit
- Print Screen
- Insert Record
- Duplicate Record
- Delete Record
- Erase Record (not the same as Delete)
- First Record
- Previous Record
- Next Record
- Last Record
- Attachments

Hovering over an icon with your cursor will display the icon’s function.
FIELD COLOR CODING

- **YELLOW** Data entry is required before saving the record. When accessing most forms in COMPASS, the system assumes you want to add a new record.

- **GRAY** No data can be entered in the field.

- **BLUE** Indicates you are in the Query Mode, and selection criteria may be entered in the fields highlighted blue.

- **WHITE** Indicates an optional entry field.
Additional information can be viewed, queried or entered by clicking any of the following from a COMPASS form:

1. Tabs (only one tab can be accessed at a time)
2. Function buttons
3. Field buttons
COMPASS allows a limited number of forms (windows) to be open at one time

An error message appears in the lower left hand corner of the screen if too many forms (windows) are open

FRM-41353: Cannot start another call form.

Some of the forms must be closed in order to proceed
Exercise 2
1. Access the Work Order form from the Navigator screen
2. Enter query mode by clicking or the F7 key
3. In the **Description** field next to the **WO Number** field, enter **CEILING LEAK**

4. Click the **Count Records** icon; notice the number of hits displayed at the bottom of your screen

**CAUTION** Performing a blank query will cause the entire database to be queried for a blank record, and there is no “stop” button
5. Execute the query by clicking the icon or F8 key
6. Records matching the exact selection criteria are displayed
7. Use the Next Record or Previous Record arrows on the toolbar or the Pgup and Pgdn keys to scroll through the query results
BASIC QUERY WITH WILD CARD

Exercise 3

1. Enter the query mode again by clicking 🔍 or F7 key
2. In the Description field next to the WO Number field, enter %ROOF LEAK%
3. Execute the query by clicking \( \text{search icon} \) or F8 key
4. Results show all WOs where the words ROOF LEAK was found in any part of the Description field
Exercise 4

1. Enter the query mode again by clicking $or F7 key
2. In the Description field next to the WO Number field, enter %ATTENDANT BOOTH%TOILET%, and in the Building field, enter 183
3. Execute the query by clicking or F8 key

4. Results show all WOs where the words ATTENDANT BOOTH and TOILET was found in any part of the Description and the Building number equals 183
Exercise 5

1. Access the *Equipment Workbench* form from the Navigator screen
2. Enter query mode by clicking ☰ icon or F7 key
3. In the Nomenclature field enter %PUMP%
4. Execute query by clicking or F8 key
5. Query results are listed in numerical order
6. Double click a record to retrieve it or use a function button to perform further tasks against a record
Exercise 6

1. Enter query mode again by clicking \( \text{REPEAT QUERY} \) icon twice or the F7 key twice
2. Selection criteria from the previous query reappears on the form exactly as entered
3. Change the criteria or enter additional criteria in another field (highlighted blue) to narrow the search
4. Enter 142 in the Building field
5. Execute query by clicking or pressing F8 key
6. Notice how the results include only building 142 equipment with PUMP anywhere in the Nomenclature field

**see U005: Advanced Query for additional query techniques**
Like Microsoft Windows, right-clicking certain fields (i.e. WO Number, Equipment, PO Number) displays a menu with additional functions from which to choose from.
HELP WITH COMPASS

- Online help is available using the Help drop down menu

1. Keyboard displays the keyboard shortcuts and their functions
2. Form gives information on the COMPASS form you are currently using
3. FAMIS (COMPASS’ technical name) Online Help Manual is a searchable manual that opens a separate tab in your browser
4. Field gives information about the field your cursor is currently resting on
HELP WITH COMPASS

How do I get help after training?

- Access the Business and Operations Support unit’s website at http://www.facm.umn.edu/employees/training/index.htm for more information on policies, procedures and quick references

- Contact your District Planner

- COMPASS support is also available by calling OIT at 1-HELP
Exercise 7

1. Close all forms before logging out of COMPASS (Navigator screen can remain open) or you will be given a warning message
2. Then from the drop down menu, click File and Log Out
3. A pop-up asking if you are sure you want to logout appears, just click the OK button
4. The Logged Out pop-up box appears, click Exit or click Log On to return to the Logon form