U003: Workbenches and Folder Setup
EXAMPLES NEEDED FOR TRAINING

- No examples are required for this training unit.
U003 WORKBENCHES AND FOLDER SETUP

SUBJECTS COVERED IN THIS UNIT:

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WHAT IS A WORKBENCH?

- Workbenches display a list of similar records in a summary fashion. Many functions can be accessed from the workbenches.

Some of the workbenches that exist in COMPASS are:

- Project Workbench (Mini-Projects)
- Current Schedule Workbench
- Equipment Workbench
- Facility Workbench
- Service Request Workbench
What is the Service Request Workbench?
- “In Box” for service requests
- Service request summary data is displayed and processed easily

Why use the Service Request Workbench?
- Lists service requests at a summary level with drill down capability
- Lists Web service requests submitted by customers
- Rapidly find a list of open or closed service requests
- Ability to quickly convert a list of service requests into WOs or Mini-Projects
1. Access the Service Request Workbench from the Navigator screen.
2. Choose the folder you would like to use, or create a folder by clicking the Edit... button and duplicating an existing folder. Public folders cannot be modified or deleted.
3. Highlight a SR number and click the View... button. Review the service request and make changes if needed. To convert the service request to a work order, change the Status field to SCHEDULED and save/commit the record. The new work order will be deposited in the corresponding crew backlog for scheduling. If the service request is a duplicate or is cancelled, change the Status to DUPLICATE or CANCELLED. The service request disappears from the Service Request Workbench after it’s been converted to a work order or changed to an inactive Status.
4. Click the New... button to bring up a blank Service Request form ready for data entry.
5. Service requests can be assigned to an employee and converted to a work order at one time by highlighting the SR number and clicking the Assign / Schedule... button. Use the LOV button to choose an employee to assign the work order to. Use the LOV button to change the Status to SCHEDULED. Click the OK button.
6. To convert the service request to a mini-project work order, highlight the work order and click the Convert to Proj... button. The service request then disappears from the Service Request Workbench form. This function is generally used by the FM Construction unit.
### SERVICE REQUEST WORKBENCH

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Reference Fields:

- **Requestor**: Individual requesting the service.
- **Priority (labeled Pr)**: Priority Code of the service request.
- **Status**: The current status of the SR
- **Type**: Type of maintenance; new Web requests will have a maintenance type of WEB.
- **Description**: The short description for the service request.
- **Start Date**: Typically interpreted as the earliest date the work can be performed.
- **Site**: Designates the appropriate Campus where the work will occur.
- **Equipment**: Equipment number associated with the work to be performed.
- **SR Number**: Service request number.
- **Building**: Building number where work will be performed.
- **Craft**: Craft assigned.
- **Crew**: Crew assigned.
- **Assigned To**: Individual assigned to perform the work.
- **Due Date**: When the work needs to be completed; this date is automatically calculated when the priority code is entered.
- **Zone**: District where the work will be performed.
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Reference Functions:

- **View...**: Opens the *Service Request* form to view the detail or edit the service request. Also double clicking or pressing the Enter key while your cursor is on the service request with open the *Service Request* form.

- **New...**: Allows entry of a new service request; opens a blank *Service Request* form in data entry mode.

- **Assign / Schedule...**: Accesses the *Assign Service Request* form, and the *AssignedTo* and *Status* fields can be updated. Changing the *Status* field to SCHEDULED will convert the service request to a work order.

- **Convert to Proj...**: Converts the service request to a project request, and displays the new mini-project number. FM Construction is the only FM business unit currently using this functionality.
FACILITY WORKBENCH

• What is the Facility Workbench used for?

  • Viewing building numbers and their Site and Zone (District) assignments
  • Viewing building data: addresses, account numbers, number of floors, room numbers, room types, room square footage
  • Viewing building manager contact information
  • Viewing the work order backlog, facility PMs, and work order history for an entire building, floor, or room
  • Viewing equipment records for a particular building, floor, or room
  • Creating service requests for a particular building, floor, or room
Intentionally Blank Slide
FACILITY WORKBENCH
1. Access the *Facility Workbench* from the Navigator screen
2. Change the folder if so desired. New folders can be created by highlighting an existing folder and clicking the *Edit...* button and duplicating the folder. Perform further queries if needed.
3. Click the *Attachments* icon to view Notes or Emails associated with the highlighted building.

Reference Functions:

- **Floors...** button: To view the number of floors in the highlighted building. Also accessible from the *Floor...* button are:
  1. **Rooms...** button: To view rooms and a description of their use as well as the square footage for each room. There is also capability to view equipment, work order history and backlog for each room displayed. New service requests can be created here as well.
  2. **Create SR...** button: To create a service request for a highlighted floor.
  3. **Equipment...** button: To view equipment for a selected floor.
  4. **WO Backlog...** button: To view the active work order backlog for a selected floor.
  5. **WO History...** button: To view non-active work orders for a selected floor.
FACILITY WORKBENCH
Reference Functions:

- **View SR...** button: To view active service requests for a selected building. The *Work Order* form appears and one must press the *pg dn* key or the *down arrow* to scroll through the service requests.
- **Create SR...** button: Opens the *Service Request* form that is ready for data entry. The building selected will be auto-filled on the form.
- **Equipment...** button: Brings up an equipment listing for the selected building. The list can be queried further and the individual equipment numbers can be viewed in further detail.
- **WO Backlog...** button: Brings up the *Current Schedule Workbench*; change the folder if necessary to view active work orders for a selected building.
- **WO History...** button: To view a list of non-active work orders for a selected building. This list can be queried further and the individual work orders can be viewed in further detail.
- **Facility PM...** button: To view custodial PM data for the selected building. Includes PM numbers, description, last PM work order, last PM date, next PM date. Also the scheduling criteria can be viewed for each PM listed, which includes frequency data.
- **View Building...** button: To view the selected building’s address, building manager contact information, floors in the building, building aliases, and account numbers.
WHAT IS A WORKBENCH FOLDER?

- Workbench Folders are also referred to as “Views”, “Personal View”, “Custom View” or “Custom Folder”
- A Workbench Folder (view) is a customized Workbench
- A Workbench Folder automatically sorts and queries the data in the workbench
- Folders can be intricate queries that only need to be set up once and can be used repetitively
- Choose from a public folder already in the system that cannot be deleted or modified, or create a customized private folder
- Only records that meet the selection criteria of the folder will be displayed
EXERCISE 1

1. Access the Service Request Workbench from the Navigator screen
2. Click the LOV button for the folder and choose All Active Work Requests
3. Click the Duplicate... button on the Edit Folder screen
CREATING AND MODIFYING WORKBENCH FOLDERS

4. Enter your name as the New Folder Name and click **OK**
5. Choose Due Date from the LOV for the **Secondary Sort** field
6. Display the first five columns in the following order: SR Number, Start Date, Due Date, Maint Type, Description by clicking the **Move Field Up** button until they are in their place
7. Click the Filter tab
8. Choose HSTM1-LM (or your Crew) from the LOV button on the Crew field and click the OK button
9. The Service Request Workbench will only list service requests for the Crew selected
CREATING AND MODIFYING WORKBENCH FOLDERS

- Ways to customize folders:
  - Display order of columns that appear on the workbench
  - Primary and secondary sorts as well as sort order
  - Set filters for preset fields
  - Set advanced filters for fields not listed (syntax is covered in Advanced Query training or contact BAS personnel for assistance)

FYI

1. Folder names cannot be changed. You must duplicate the folder, give it a new name, and then delete the original folder.

2. You cannot delete a default view. First, change your default folder on the Options tab, then delete the folder.
SETTING THE DEFAULT FOLDER

- Choose a folder
- Click the **Edit...** button
- Click the Options tab
- Highlight the folder you want from the LOV and click **OK**
The End!!!