FACILITIES MANAGEMENT
110 Work Initiation

U117: Procedure Libraries
EXAMPLES NEEDED FOR TRAINING

Slide 6: Go through the process of creating a Service Request using the Procedure Library.

Slide 14: Access one of the existing procedures until you get to the Procedures form, as if you were going to modify it. Go through the fields and what they include and where they appear on the Service Request or Work Order.

Slide 18: Create a procedure with the students walking through it step by step on the projection screen, then have them create their own procedure. Have the students create a Service Request using the Procedure they just created.
U117 PROCEDURE LIBRARIES

SUBJECTS COVERED IN THIS UNIT:
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INTRODUCTION

Procedure Libraries...

- Are used for frequently performed maintenance activities
- Are templates that contain description, task list, crew, craft, parts lists, estimates and other information
- Are used to standardize Service Request and Work order creation
- Eliminate repetitive data entry
- Make it possible to report on SRs/WOs by the procedure used, rather than the SR/WO description
Intentionally Blank Slide
ACCESSING PROCEDURE LIBRARIES
1. From the Service Request form, click the Work Plan... button
2. Click the Build Plan from Library button
3. Checking the Preserve Details checkbox preserves the WO Description and Task List that was previously entered before selecting the procedure, but this works only on the Work Order form, not on the Service Request form
4. Click the LOV button for the PL Number field
ACCESSING PROCEDURE LIBRARIES

1. Procedure Books
   - FM WIDE SERVICE REQUESTS - FACILITIES SUPPORT
   - INTERNAL USE ONLY - FACILITIES SUPPORT
   - FM MAINTENANCE ???
   - INTERNAL USE ONLY - CENTRAL PLANNING
   - BUSINESS SUPPORT - FOR INTERNAL USE ONLY
   - FM WIDE SERVICE REQUESTS - BSAC
   - FM WIDE SERVICE REQUESTS - CONSTRUCTION
   - FM WIDE SERVICE REQUESTS - ENERGY
   - FM WIDE SERVICE REQUESTS - ZONES
   - INTERNAL USE ONLY - CONSTRUCTION
   - INTERNAL USE ONLY - ENERGY
   - INTERNAL USE ONLY - ZONE 1

2. Procedure Chapters
   - ABATEMENT SERVICES
   - ELEVATOR SERVICES
   - LOCKSMITHING SERVICES
   - METAL FABRICATION SERVICES
   - SIGN SHOP SERVICES
   - WASTE MANAGEMENT SERVICES

3. Procedure Sections
   - KEY DUPLICATION REQUEST
   - EMERGENCY LOCKSMITHING SERVICE - IMMEDIATE
   - RUSH LOCKSMITHING SERVICE - SAME DAY
   - RUSH CORE CHANGE(S) - SAME DAY
   - RUSH LOCKSMITHING SERVICE - NEXT WORKING DAY
   - RUSH CORE CHANGE(S) - NEXT WORKING DAY
   - ROUTINE LOCKSMITHING SERVICE - IN 10 WORKING DAYS
   - ROUTINE CORE CHANGE(S) - IN 10 WORKING DAYS
   - LOCKSMITHING SERVICE ESTIMATE - IN 5 WORKING DAYS
ACCESSING PROCEDURE LIBRARIES

5. The Procedure Books appear and are grouped by business unit. Click and highlight the business unit that is most likely to have the procedure you want and then click the OK button.

6. The Procedure Chapters appear which are services or sub-groups within the business unit. Click and highlight the service or sub-group you want and click the OK button.

7. Finally the Procedure Sections appear; these are the individual procedures. Click and highlight the procedure you want and then click the OK button.
ACCESSING PROCEDURE LIBRARIES
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8. The Procedure form appears with the data that will be auto-filled on the SR, click the OK button.

9. The Procedure Library form appears again with the PL Number auto-filled, click the OK button again.

10. You are then returned to the Work Plan form, close the form by clicking the X in the upper right hand corner.
ACCESSING PROCEDURE LIBRARIES
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11. In the Short Description field, type over the generic text carried over from the procedure.
12. Complete the Service Request form as you normally would.
PROCEDURES FORM
PROCEDURES FORM

1. **Description**: Enter brief description; 64 characters.
2. **Task List**: Enter text as desired.
3. **UM**: Enter the unit of measure, usually EA. This field is required by COMPASS.
4. **Method**: Enter a method; press the F9 key to access a LOV.
5. **Maint Type**: Enter a maintenance; press F9 key to access a LOV.
6. **Priority**: Enter the priority; press the F9 key to access a LOV.
7. **Encumber check box**: FM does not currently use.
8. **Crew**: Enter the crew; press the F9 key to access a LOV.
9. **Crew Size**: Enter the crew size; press the F9 key to access a LOV.
10. **Craft**: Enter the craft; press the F9 key to access a LOV.
11. **Hours**: Enter estimated hours; this field is required by COMPASS.

Reference Fields:

- Book Number/Description, Chapter Number/Description, and Section: Auto-filled by COMPASS.
- **PL Number**: Automatically assigned by COMPASS. PL Numbers are created by concatenating the Book Number, Chapter Number, and Section Number. For instance, Book 001, Chapter 003, and Section 211 becomes PL Number 001003211.
- **Rate**: Automatically filled in based on the Crew entered.
12. **Parts**: COMPASS part numbers can be added using Part Search of Bills of Material. These part numbers will be listed on the Work Order on the Parts tab when the Procedure is used.

13. **Tools**: This function is not being utilized by FM.

14. **POs**: This function is not being utilized by FM.

15. **Web Defaults**: Used to enter billing defaults for Web requests; Web procedures are created and updated by the FM Call Center.

**Reference Fields:**

- **Estimated Costs**: Automatically added by COMPASS.
CREATING A NEW PROCEDURE

**EXERCISE 1**

1. Access the *Procedures Library* form from the Navigator screen
2. The *Books* form is initially displayed; click and highlight the business unit where the new procedure will be added
3. Click the *Chapters* button
CREATING A NEW PROCEDURE

4. The *Chapters* form appears; click and highlight the desired Chapter and then click the *Sections* button
5. If no Chapter seems to fit, enter a new Chapter title after the last Chapter entered and then click the *Sections* button
6. The *Sections* form appears and is ready for entering the new Procedure name
7. Do not check the Web checkbox; Web procedures are created and maintained by the FM Call Center
8. Enter the new Procedure name in the next available line, then click and highlight the new Procedure name that you just entered (notice the Procedure button is no longer grayed-out)
9. Click the Procedure button
CREATING A NEW PROCEDURE

10. The Book, Chapter, and Procedure are auto-filled at the top of the form.
11. Enter all the data you would like to have appear on the template.
12. The PL Number will be auto assigned by COMPASS when the Procedure is saved.
13. If entering Parts, they will be referenced on the Work Order Parts tab. An Issue Request would need to be created from the Work Order to order the parts.
14. **Tools** are not used at this time
15. **Web Defaults** are used when setting up web procedures; these are created and maintained by the FM Call Center
16. Close the *Procedures* form or press the *F10* key to save the Procedure
The End!!!

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