EXAMPLES NEEDED FOR TRAINING

Slide 6: Bring up the Facility Workbench and go through how to choose a folder and how to query for buildings.

Slide 8: Review the Floors button and other buttons that can be accessed from there.

Slide 10: Review the View SR, Create SR, Equipment, WO Backlog and WO History buttons and what can be viewed and how to query, and create SRs.

Slide 12: Review the Facility PMs and scheduling criteria.

Slide 13: Review the View Building data.

Slide 14: Allow the students to work through the exercise and then review how to find the answers in COMPASS by using the projection screen.

Answers:
1. 7
2. 8
3. 1,686 sq. ft.
4. Jim Morse
5. 13
6. April 30, 2007
7. 7
8. none
U615 FACILITY WORKBENCH

SUBJECTS COVERED IN THIS UNIT:
Introduction ............................................... 4
Facility Workbench Form............................ 6
Exercise 1..................................................... 14
INTRODUCTION

• 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
1. Access the Facility Workbench from the Navigator screen
2. Query for the Site (01 = Minneapolis or 02 = St. Paul), Building (designated building number if known), Description (building name) or Zone (District). 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.
FACILITY WORKBENCH FORM

Indicates the Site / Building Number of the current record
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.
<table>
<thead>
<tr>
<th>Site</th>
<th>Building</th>
<th>Description</th>
<th>Zone</th>
<th>Active</th>
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<tbody>
<tr>
<td>001</td>
<td>EDDY HALL</td>
<td></td>
<td>EAST BANK</td>
<td>Y</td>
</tr>
<tr>
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<td>001A</td>
<td>O'BRIEN OBSERVATORY</td>
<td>NORTHWEST</td>
<td>Y</td>
</tr>
<tr>
<td>001</td>
<td>002</td>
<td>PILLSBURY HALL</td>
<td>EAST BANK</td>
<td>Y</td>
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<tr>
<td>001</td>
<td>003</td>
<td>PATTEE HALL</td>
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<td>Y</td>
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<tr>
<td>001</td>
<td>005</td>
<td>NICHOLSON HALL</td>
<td>EAST BANK</td>
<td>Y</td>
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<tr>
<td>001</td>
<td>006</td>
<td>WULLING HALL</td>
<td>EAST BANK</td>
<td>Y</td>
</tr>
<tr>
<td>001</td>
<td>008</td>
<td>BURTON HALL</td>
<td>EAST BANK</td>
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<td>WESBROOK HALL</td>
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<td>023</td>
<td>FULTON SWITCH STATION</td>
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<td>HEALTH SCI</td>
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<tr>
<td>030</td>
<td>WILKINS HALL, RDY</td>
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</tr>
</tbody>
</table>
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.
Click the **Facility PM**... button to view all Facility (custodial) PM data for the selected building.

The text for a selected PM can be viewed further by clicking the **View PM**... button.

All the scheduling criteria for the selected PM can be viewed by clicking the **View Criteria**... button.
Click the **View Building**... button to view the building address, building manager contact information, and Zone (District) the building is assigned to.

Click the **Floors**... button to drill down further to view the floors and rooms in the selected building.

Click the **Accounts**... button to view the account number(s) assigned to the selected building.
EXERCISE 1

1. What is the square footage of room 3-110 in Moos Tower?

2. How many floors are in building 066?

3. How many custodial rooms are on the ground floor of building 036?

4. Who is the building contact of Weaver-Densford Hall?
EXERCISE 1

5. How many active repair work orders are there in Sanford Hall.

6. In building 115, when is the next Bathroom Power Washing PM due?

7. How many rooms are in the sub-basement of Jones Hall?

8. How many exhaust fans are in building 030?
The End!!!

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