



Work Instruction

Releasing Planned Work Requests

Planned work requests are usually for higher costs of work that include expensive equipment or construction work, which will take several weeks or months to complete.

To **release** planned work in FAMIS, complete the following steps:

1. Select an Asset from the Asset List pane.
2. Select the Work Request tab. (**Note:** A new form will be displayed in the *Display* window).
3. Complete the applicable fields from the work request tab. Available fields may differ depending on business requirements:

The screenshot shows the FAMIS uatagency interface. The top navigation bar includes 'File', 'Search', 'Reports', and 'Help'. The main content area has tabs for 'Welcome', 'Budget', 'Schedules', 'Work Request', 'Agreement', 'Job Tracking', 'Approvals', 'Job History', 'Job Billing', 'Invoicing', and 'Asset List'. The 'Work Request' tab is active, displaying a form with the following sections:

- Payment Details:** Customer (TRA0000 - DPTI), Local Id (8815), Agency Ref, General Ref.
- Job Details:** Job Type (MINOR WORKS), Work Description, Cost Category, Account Code, Work Category, Planned Start Date (Monday, 27 April 2015), Planned Finish Date (Sunday, 26 April 2015).

Buttons at the bottom include 'Save As Default', 'Release', 'Hold', and 'Cancel'.

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- a) Agency Ref and General Ref are optional fields and may be used by the Agency to further identify work on invoices.
- b) Select the type of work from the Job Type drop down list. (**Note:** System defaults to Breakdown Maintenance).
 - If job type is Minor Works, ensure PLANNED is selected from the additional dropdown list provided.
 - If job type is Replacement/Refurbishment, ensure PLANNED is selected from the additional dropdown list provided.
- c) Enter descriptive details regarding the work request in the Work Description field. (**Note:** this field is limited to 500 characters)
- d) Select the relevant cost category from the Cost Category dropdown list.
- e) Enter a value in the Estimated Cost field.
- f) Select a work category from the Work Category dropdown list.
- g) Choose a Planned Start date and the Planned Finish date using the calendar. (**Note:** Dates must be changed from the default before the Release button is enabled).
- h) Enter Site Contact name and phone number in the Contact Name and Contact Phone fields.
- i) Click the Release button to save the job to the Agreement tab.

Note: All Mandatory fields must be populated before the Release button is enabled. The FAMIS request will automatically advance to the Agreement tab.

Action	Status	Ident	Asset	Asset Zone	Agreement Type	Work Description	Est. Cost Fixed
	Pending	25	05971 M		MIN	Minor work	2000