ISSUES TO BE RESOLVED/ADDRESSED

1. Sell directly to departments? Need process written, bill type code?
2. Ongoing special order i.e. Sanican, PO enter at 1000 unites and receive partial.
   Because cannot, to keep open, once fully received can’t change.
3. DC Code in release what field?
5. Counter Release- person name-come up, org/ off fund, wants name to fill field
   rather than number.
6. MSDS- stock file option, purchase reg?
7. Markup- PO must have, not pulling from stock file, wants required field
8. Object codes- Extended reference using non-stock. Each stock part has obj
   code assigned; it is pulling to the API table.
<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>University of Alaska Fairbanks</td>
<td>1</td>
</tr>
<tr>
<td>Issues to be Resolved/Addressed</td>
<td>2</td>
</tr>
<tr>
<td>Logging into the Server and the FacilityFocus System</td>
<td>5</td>
</tr>
<tr>
<td>Warehouse Modules with Paths</td>
<td>7</td>
</tr>
<tr>
<td>Warehouse Modules with Paths (continued)</td>
<td>8</td>
</tr>
<tr>
<td>Warehouse Work Flow Chart</td>
<td>8</td>
</tr>
<tr>
<td>Warehouse Work Flow Chart</td>
<td>9</td>
</tr>
<tr>
<td>Inventory Counter Release Process</td>
<td>10</td>
</tr>
<tr>
<td>Contracts and Contractors Module</td>
<td>11</td>
</tr>
<tr>
<td>Contracts and Contractors Module (continued)</td>
<td>12</td>
</tr>
<tr>
<td>Detail lines scrolled to right</td>
<td>14</td>
</tr>
<tr>
<td>Working with Stock Numbers</td>
<td>15</td>
</tr>
<tr>
<td>Assign Part to Warehouse Bin</td>
<td>17</td>
</tr>
<tr>
<td>Purchase Order Process</td>
<td>19</td>
</tr>
<tr>
<td>To Reopen a Purchase Order</td>
<td>21</td>
</tr>
<tr>
<td>Purchase Receives Screen</td>
<td>22</td>
</tr>
<tr>
<td>Disbursement screen</td>
<td>24</td>
</tr>
<tr>
<td>Reverse Disbursement Screen</td>
<td>25</td>
</tr>
<tr>
<td>Material Cost Capture</td>
<td>27</td>
</tr>
<tr>
<td>Counter Return</td>
<td>28</td>
</tr>
<tr>
<td>Credit Card Materials Purchases</td>
<td>30</td>
</tr>
<tr>
<td>Special Order Material Request (Non-Stock only)</td>
<td>32</td>
</tr>
<tr>
<td>Automated Inventory Re-Stock Screen</td>
<td>33</td>
</tr>
<tr>
<td>Inventory Adjustment</td>
<td>35</td>
</tr>
<tr>
<td>External Inventory Adjustment Screen</td>
<td>36</td>
</tr>
<tr>
<td>External Charges Posting</td>
<td>37</td>
</tr>
<tr>
<td>Service Contracts</td>
<td>39</td>
</tr>
<tr>
<td>Change Order Screen: End Date</td>
<td>42</td>
</tr>
<tr>
<td>Service Contract Invoice Entry</td>
<td>43</td>
</tr>
<tr>
<td>Service Contract Invoice Adjustment Screen</td>
<td>46</td>
</tr>
<tr>
<td>Materials Purchasing Cost Capture</td>
<td>47</td>
</tr>
</tbody>
</table>
Navigation Techniques ................................................................. 48
Filtered Search and Find ............................................................ 49
Comparison Criteria ............................................................... 51
LOGGING INTO THE SERVER AND THE FACILITYFOCUS SYSTEM

FacilityFocus is a web application. Access to the system requires a browser and a valid user ID and password for both the server and the FacilityFocus system. The process and screens are shown below.

To acquire an ID and password, you must complete a Network Access Request Form (NARF) and acquire the appropriate approvals. Then submit the completed form to the Facilities Services Human Resources unit. The completed form will be routed to the UAF Facilities Services System Administrator or Database Manager and will be entered into the system.

1. Open the Microsoft Internet Explorer browser.
2. Enter the URL for the system: ua.csimaximus.com. A user login screen for the server will load on the screen.
3. Enter a valid user ID and password to log onto the server. After login, the University of Alaska portal screen will show the applications available to you.
4. In the applications window on the left side of the portal screen, the FacilityFocus application icon is listed. Double-click on this icon to bring up the FacilityFocus Signon screen.
5. Enter your valid FacilityFocus login and password. The FacilityFocus Menus screen will open. The user has successfully logged onto the system.

NOTE: The system will time out after a period of inactivity and you will need to log back into the server to gain access.
## Warehouse Modules with Paths

<table>
<thead>
<tr>
<th>Module</th>
<th>Path</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Setup Contractors</strong></td>
<td>Contracts and Contractors Module/ Contracts and Contractors/ Entry/ Contractors</td>
</tr>
<tr>
<td><strong>Insert/Edit Stock Numbers</strong></td>
<td>Inventory and Equipment/ Entry/Enterprise Inventory Master/ Insert/ Edit Stock Numbers</td>
</tr>
<tr>
<td><strong>Setup Contractor Catalog</strong></td>
<td>Inventory and Equipment Module/ Inventory and Equipment/ Entry/ Contractor Catalogs</td>
</tr>
<tr>
<td><strong>Assign Part to Warehouse to Bin</strong></td>
<td>Inventory and Equipment/ Entry/ Warehouse Bins/Warehouse Part/ Bin Edit</td>
</tr>
<tr>
<td><strong>Create PO</strong></td>
<td>Purchasing Module/ Purchasing/ Entry/ Orders/ Purchase Order Transactions</td>
</tr>
<tr>
<td><strong>Reopen Purchase Order</strong></td>
<td>Purchasing Module/ Purchasing/ Entry/ Orders/ Reopen Purchase Orders</td>
</tr>
<tr>
<td><strong>Receive</strong></td>
<td>Purchasing Module/ Purchasing/ Entry/ Receiving</td>
</tr>
<tr>
<td><strong>Disburse</strong></td>
<td>Purchasing and A/P/ Entry/ Disbursement</td>
</tr>
<tr>
<td><strong>Reverse Disbursement</strong></td>
<td>Purchasing and A/P/ Entry/ Reverse Disbursement</td>
</tr>
<tr>
<td><strong>Counter Release</strong></td>
<td>Inventory and Equipment/ Inventory Management/ Entry/ Warehouse Transactions/ Counter Release</td>
</tr>
</tbody>
</table>
### Warehouse Modules with Paths (continued)

<table>
<thead>
<tr>
<th>Module</th>
<th>Path</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Counter Return</strong></td>
<td>Inventory and Equipment Module/Inventory &amp; Equipment/ Entry/ Warehouse Transactions/Counter Return</td>
</tr>
<tr>
<td><strong>Credit Card Material Purchase</strong></td>
<td>Purchasing and A/P Module/ Purchasing/ Entry / Orders/ Credit Cards</td>
</tr>
<tr>
<td><strong>Automated Inventory Re-Stock</strong></td>
<td>Inventory and Equipment Module/ Inventory Management/ Entry/ Automated Inventory Restock Screen</td>
</tr>
<tr>
<td><strong>Inventory Adjustment</strong></td>
<td>Inventory and Equipment/ Entry/ Warehouse Transactions/ Inventory Adjustments</td>
</tr>
<tr>
<td><strong>External Inventory Adjustment</strong></td>
<td>Inventory and Equipment Module/ Inventory and Equipment/ Warehouse Transactions/ External Inventory Adjustment Screen</td>
</tr>
<tr>
<td><strong>External Charges</strong></td>
<td>Finance Module/ Fianance/ Entry/ External Charges</td>
</tr>
<tr>
<td><strong>Service Contracts</strong></td>
<td>Contracts and Contractors/ Contracts/ Service Contracts/ Service Contract Entry</td>
</tr>
<tr>
<td><strong>Service Contract Invoice Entry</strong></td>
<td>Purchasing/ Accounts Payable/ Service Contract Invoice/ Service Contract Invoice Entry</td>
</tr>
<tr>
<td><strong>Service Contract Invoice Adjustment</strong></td>
<td>Purchasing and AP Module/ Purchasing/ Entry/ Accounts Payable/ Service Contract Invoice/ Service Contract Invoice Adjustment</td>
</tr>
</tbody>
</table>
WAREHOUSE WORK FLOW CHART

Inventory Setup

Select a warehouse

Create a part

Assign to a bin

Establish Contractor List

Enter Contractor Catalog

Procurement through Material Release

Purchase Order

Receiving

Disbursement

Reverse Dispers.
INVENTORY COUNTER RELEASE PROCESS

Initiating Event

Technician will usually go to vendor and buy using a credit card. Data entry into the system will take place after the fact.

If purchase is by Credit Card

Credit Card Transaction Screen

OPEN FINALIZED

Disbursement

FINALIZED RECEIVED

If the purchase is by Purchase Order

Purchase Order Transaction

OPEN APPRV

Disbursement

READY FINALIZED

Receiving

FINALIZED RECEIVED

Approval

We will no be using the credit card function at this time because it has no way to add markup.

Reverse Disbursement

Counter Release

Counter Return
Inventory Counter Release Process

Counter Release

Counter Return
CONTRACTS AND CONTRACTORS MODULE

The System Administrator will set up the Contractor Type and Specialty as part of the configuration of FacilityFocus. This must be done before setting up contractors in the Contracts and Contractors Module.

Contractor Setup

The Contractors defined on this screen provide the Contractor list for use in setting up records in all the entry screens of FacilityFocus where an outside vendor can be specified.

Path: Contracts and Contractors Module / Contracts and Contractors / Entry / Contractors

1. Click Insert on the menu bar to create a new record.
2. Enter a recognizable acronym for the contractor in the Contractor field. Establish a naming convention for this purpose.
3. Enter the legal complete name of the contractor in the Name field.
4. Select a type from the drop-down box for the Contractor Type field (such as Landlord or Vendor).
5. Select a specialty from the drop-down box for the Specialty field.
6. Enter the contractor’s SSN or tax ID number into the Federal Tax ID field.
7. In the Qualified field, click to place a checkmark if the contractor is approved to do business with UA. If you do not place this checkmark, the contractor will not be made available in any drop-down box and thus cannot be chosen for work.
8. Enter a date when the contractor’s qualification will expire in the Exp. Date. This is a zoom field to save data entry time.

EDI processing is not enabled for UA. Leave these fields blank, as well as Rating, M/WBE and 1099 Code, unless instructed to use them by your System Administrator.
You may also set up a primary address for this contractor and term codes for making payments.
To enter a primary address:

- 1. Enter a number or an alpha identifier in the Address Code field. 1 or 001 is usually sufficient.
- 2. Enter an Address, City, State (two-letter ID chosen from the drop-down field), ZIP, Phone and Fax.

The Addresses button on the right of the screen provides several other address types you may complete, such as INVOICE and RETURNS. The System Administrator will need to set up the types before you can enter addresses here.

You may also set up other information about the contractor using the buttons on the right of the screen, but none of this information is mandatory.

**SAVE the record at the completion of your data entry by clicking the icon on the menu bar.**

### Set up a vendor catalog

Use the Supplier (Contractor) Catalogs screen to identify the parts you purchase from vendors. On this screen, associate the vendor-supplied part with an item in your inventory so that when you need a replacement, you can select a vendor who supplies the part you need at the best price and quantity.

Path: Inventory and Equipment Module / Inventory and Equipment / Entry / Contractor Catalogs
The vendor must already be set up in the Contracts and Contractors module. Parts must already be set up in your inventory.

1. In the Contractor field, select a vendor from the zoom list or perform a search and find operation for a specific vendor.
2. Click the INSERT button to begin entry of new parts.
3. Enter the part number from the supplier in the Supplier Part field.
4. Enter a description of the part, the UOM and the Cost.
5. Enter the Issue Factor - the number of items making up one unit of the Supplier Part (e.g. Issue factor for a carton of eggs is 12). This number is usually 1.
6. Zoom to choose a part from your inventory for the Inventory Part field. Information from the current record will fill in the other fields automatically.
7. You may continue adding parts by placing your cursor into the last field in the current row and pressing the carriage return. This action opens a new blank row below the current one.
8. SAVE the record by clicking the icon on the menu bar.
WORKING WITH STOCK NUMBERS

This is the screen where work (set up account distribution, edit stock numbers, etc) with Stock Numbers is done.

Path: Inventory and Equipment/ Entry/ Enterprise Inventory Master/ Insert

1. Click Insert on the menu bar to create a new record.

2. Enter a number in the part field. It must be unique.
3. The Status is OUT OF STOCK by default for any new item. Do not change this status. FacilityFocus will automatically update the status to AVAILABLE once a quantity has been entered for the item in the Inventory Adjustment screen, and the status will automatically change to OUT OF STOCK if all items in stock are issued out over time.
4. Enter a description of the item, with notes if you have additional information.
5. In the UOM field, choose EA or one of the other unit of measure descriptors from the drop-down box.
6. For the Type field, choose EQUIPMENT or one of the other descriptors from the drop-down box. If you choose EQUIPMENT or DURABLE, the Serialized checkbox will automatically be checked.
7. In the Preferences box, choose a warehouse name from the drop-down box for the Warehouse, if you have a preference for warehousing the item. This field is not required.
8. For Class, Commodity and Category, choose from the drop-down boxes. Class is required. Commodity is required if you plan to set up a vendor catalog. These fields may be reported on, providing more detail if that is desired.
9. Click the Warehouse button on the right side of the screen and choose a warehouse from the drop-down box. Close the window.
8. Leave all other fields blank.

9. SAVE the record by clicking the icon on the menu bar.
ASSIGN PART TO WAREHOUSE BIN

Inventoried parts require a bin location. This is done in the Warehouse Bins Maintenance screen.

Path: Inventory and Equipment / Entry / Warehouse Bins / Warehouse Part/Bin Edit

1. All the warehouses are accessible via a search and find operation. Select one from the list.
2. Zoom the part field and choose a part from the list. The part description will fill in automatically. The current quantity (Qty field) will fill in automatically.

Other fields you may wish to enter data into are available by scrolling to the right (click the scroll bar at the bottom of the screen).

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bin Order</td>
<td>Bin Part Precedence determining the first bin selected if the part is stored in multiple bins. Enter a number.</td>
</tr>
<tr>
<td>Minlev</td>
<td>Minimum level the quantity of parts can reach before it needs to be restocked. This is the only place that this value can be set. Values roll up to the Enterprise Inventory Master Warehouse window then to the Enterprise Inventory Master itself. Enter a number.</td>
</tr>
<tr>
<td>Maxlev</td>
<td>Maximum Level the quantity of parts can reach in stock, above which the FacilityFocus System should provide a warning message. This is the only place that this value can be set. Values roll up to the Enterprise Inventory Master Warehouse window then to the Enterprise Inventory Master itself. Enter a number.</td>
</tr>
<tr>
<td>Order Quantity</td>
<td>Quantity on order. If Quantity here is equal to zero, the user can delete the record. The total of the Reorder Level plus the reorder quantity must be less than or equal to the maxlev. You will receive error messages indicating this logic and remedial action to populate all three fields to satisfy this math logic. NOTE: The Order Quantity and Reorder Quantity are required if you are utilizing the Automated Inventory ReStock screen functionality.</td>
</tr>
<tr>
<td>Reorder Quantity</td>
<td>Required quantity to order at a time. If Order Quantity is 10 and the Reorder Quantity is 20, the PO would be cut for 20. The total...</td>
</tr>
</tbody>
</table>
of the Reorder Level plus the reorder quantity must be less than or equal to the maxlev. You will receive error messages indicating this logic and remedial action to populate all three fields to satisfy this math logic. NOTE: The Order Quantity and Reorder Quantity are required if you are utilizing the Automated Inventory ReStock screen functionality.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Start Date</td>
<td>The System uses this Cycle Count Start date as a seed date for generating schedules. Zoom to select a date.</td>
</tr>
<tr>
<td>Schedule Frequency</td>
<td>Frequency with which this item should be inventoried. Select from the drop-down list. Frequency codes from the Preventive Maintenance system also apply here. See the table at the bottom of this screen to gain a clearer picture of the associated values.</td>
</tr>
<tr>
<td>Parent Warehouse</td>
<td>Location of Parent Warehouse. Select from the drop-down list.</td>
</tr>
<tr>
<td>Parent Bin</td>
<td>Location of Parent Bin. When a user zooms Bin Location and Parent Bin Location, the system filters these fields by warehouse and parent warehouse respectively. Zoom to select a Bin.</td>
</tr>
</tbody>
</table>
PURCHASE ORDER PROCESS

Use this process for special orders as well as stock orders. Vendor must be set up in the Contracts and Contractors module before entering their PO’s into the FacilityFocus database. A Purchase Order (P.O.) transaction is always entered against a vendor account.

Path: Purchasing Module / Purchasing / Entry / Orders / Purchase Order Transactions

1. Click Insert on the menu bar to create a new record. The PO No is automatically generated by the system. The Status will be OPEN and the Created date will be today’s date.
2. A PO Code is defaulted to the screen. Change this number to your internal purchase order number. This number can be added to an existing PO until the PO reaches the FINALIZED status.
3. In the Description field, enter the C/C#, BPO#, LPO#, CASH, etc. Use the Notes feature if you have more than 80 characters of information.
4. Zoom the Contractor field and choose a vendor from the list.
5. Enter a date in the Needed On field (optional). Zoom to reveal a calendar to save data entry time.
6. Zoom the Requestor field and choose a name from the list (optional).
7. Enter a date in the Expected field if you wish, although this is optional. Zoom to reveal a calendar to save data entry time.
8. For the PO Type, the choices are NO 3-WAY or # WAY MATCH. The warehouse is using the NO 3-WAY as a default.
9. Zoom the Supplier Part field and select one of the parts from the list. The Description field will fill in automatically based on the item you select. You may alternatively enter a part and description for non-inventory items.
10. Finish the fields for the item - UOM, Unit Cost, Quantity, and Shipping if they are known at the time of entry.
11. Click on the Disbursement button.
All items will be disbursed to UAF warehouse (UAFFS), or directly to a work request. (In our example, the first item is being disbursed to the work request and the second item will be disbursed to the warehouse.)

- 12. When PO entry is complete change status to FINALIZED.
- 13. SAVE the record by clicking the button on the menu bar.

**NOTE:** Setting up Contractor Catalog for the major vendors speeds the data entry process considerably, since the Supplier Part Zoom field will filter inventory items for that vendor only, which can save time if your inventory is very large. Additionally, most fields for the item will automatically fill based on the choice you make, thus eliminating most data entry for the line item itself.
TO REOPEN A PURCHASE ORDER

Path: Purchasing and A/P Module/ Purchasing/ Entry/ Orders/ Reopen Purchase Order

1. Click on the Search button, then the Find button.
2. From the list that comes up on screen find the Purchase Order to be reopened and select that record.
3. To make changes to the Purchase Order click on the UPDATE button, change the status to OPEN
4. To save the record click the SAVE button.
PURCHASE RECEIVES SCREEN

Once the PO has been entered into the FacilityFocus database, the items must be received.

Path: Purchasing Module / Purchasing / Entry / Receiving

1. Click Insert on the menu bar to create a new record.
2. Enter the PO Code or SEARCH and FIND. The rest of the fields will automatically fill in on this screen based on the PO Code entered. This field may also be zoomed to find S/O that is needs to be received, after part is found with in list click on “OK”.
3. In the Warehouse find UAFFS.
4. If you have no changes to make from the PO entry on the first screen, change the status to FINALIZED. A note, only the quantity to be received can be changed in the first screen. However if not all of the order was received enter the Qty of what was received to create a partial receiving or to enter the overage to be received.
5. FINALIZE when done and then save.
Reject Process
If a received shipment contains items which are not acceptable, you may reject them for return to the vendor.

1. Click on the Reject Button for the line item to open the Rejection screen.

- Select a Code from the drop-down box.
- Enter a Rejected Qty.
- SAVE the record by clicking the button on the menu bar.

The rejected item(s) will be returned to the Receives screen for further processing. If items are being returned to the vendor, on the Purchase Receives screen, change the status to CLOSED. If the items are going to be disbursed to another work request or warehouse bin, change the status to FINALIZED. These items will then need to be disbursed using the Disbursement screen below.
DISBURSEMENT SCREEN

The final step is to disburse the items as set up in the Transactions screen. In this screen the place where the item is to be disbursed may be changed.

Path: Purchasing and AP / Entry / Disbursement

- 1. Click Insert on the menu bar to create a new record.
- 2. Click on the one of the Load buttons - Credit Card, Petty Cash, Receives - located on the right side of the screen. A list of transactions with the status of FINALIZED will pop up on the screen.
- 3. Choose one (or all) from the list and click OK. The rest of the fields will fill in automatically based on the finalized transaction(s) chosen.
- 4. SAVE the record by clicking the button on the menu bar.

If all items on the transaction have been disbursed, a message will pop up that asks if you wish to close the transaction record. Click Yes to perform this action.
**REVERSE DISBURSEMENT SCREEN**

Use the Reverse Disbursement screen if you need to reverse the distribution process accomplished via the Disbursement screen.

Path: Purchasing and AP / Entry / Reverse Disbursement

1. Click Insert on the menu bar to create a new record.
2. Enter a description.
3. Select a Reverse Dist type from the drop-down list.
4. Choose a part from the zoom list for the Part field.
5. Select a Warehouse from the drop-down box and Choose a Bin from the zoom list for the Bin field.
6. Click on the Get Disbursed Records button at the bottom of the screen. All records meeting the criteria entered at the top of the screen will load into the screen.
7. Click the checkbox for the transaction you wish to reverse.
8. Enter the Reverse Disb Qty you wish to reverse. This can be a partial reversal or a complete reversal (whole numbers based on unit of measure only).
9. SAVE the record by clicking the button on the menu bar.

Once saved a message appears on the screen indicating that a new receiving document is being created. The new document number is shown on this screen for your records. Use this number on the Purchase Receives screen to retrieve the record for processing.

10. Click OK on the message screen to complete the creation of the receiving document.
The system tracks the date and time that the reverse disbursement was performed and the login of the user who performed it.
MATERIAL COST CAPTURE

Materials currently in inventory may be used on a job by assigning them to a work request. You may execute a counter release or perform a warehouse transfer to issue materials out of the warehouse to a job.

Counter Release

The Counter Release screen releases inventory from the warehouse to a job or to the shop.

Path: Inventory and Equipment / Inventory Management / Entry / Warehouse Transactions / Counter Release

To release to an account, fill in the Released by and Released TO, to do this only the employee name will be used. Click on the account button at the end of the row and make out the account to charge it to.

Note that if you release to an employee who is on a shop, you will not be able to change the account, since by default the cost will post to the shop account.

- Click the Insert button on the menu bar to create a new record. The system generates a Transaction number.
- Enter a reference number or some other unique identifier in the Ref No.
- For Total Amt, the system calculates this total from the list of items selected for release.
- Choose a Warehouse from the drop-down box for this field. When the warehouse has been chosen, a filtered parts list becomes available under the Load icon on the right on the screen.
- Select a name from the zoom list for the Released By field.
- Select a name from the zoom list for the Released To field.
- Description: type in a description that can include the reason the Counter Release is generated. Includes a notes function to enter details.
- Created By: This block contains the current date and time of this data entry action and defaults the user ID of the person creating the record. These fields cannot be edited.
- Click the Parts button to reveal a list based on the warehouse entered. Select the part(s) needed from the list. These will be equate to Stock Numbers. If an Inventory Balance Warning appears, print and forward to the Division Manager.
- Pick Ticket field: Leave this blank, since pick tickets are not being used by UAF at this time.
- Item field: You may add a consecutive line number if you wish.
- Description, Unit Cost, UOM. The Description, Unit Cost and UOM will automatically populate when the part is selected.
- MSDS: If an item selected has an MSDS designation as part of its inventory information, a scull and crossbones will appear beneath this icon.
- For the Quantity field, enter the quantity of items you are releasing.
- Zoom to select the Bin from which the item is being released.
• 16. **Serial No:** If this is a piece of serialized equipment, this field will contain its serial number.

• 17. **Work Request and Phase fields:** Zoom to select Work Request and Phase to release the items to.

• 18. **Zoom to select the Date Needed**

• 19. **Bin Qty on Hand:** This number depends on how many of the item are in stock. Remember that, even if the item has a serial number, there may be 10 of that item, each with its own serial number.

• 20. **SAVE the record**. This action depletes inventory and charges the parts to a job. **Once saved, it cannot be edited. Review your data entry for correctness before you save.**

Once the Counter Release is saved the release transaction and material costs of the items will appear on the Work Request and Phase entered above. They can be viewed by clicking the Phase View button or More button on the Work Request Entry Screen.

• 21. **Click the Receipt button to print a copy of the Counter Release transaction for the receiving person’s signature.**

---

**COUNTER RETURN**

This screen is used to record the return of inventory materials/items and equipment to the warehouse previously released on a Counter Release record.

**Path:** Inventory and Equipment Module / Inventory and Equipment / Entry / Warehouse Transactions / Counter Return

1. **Click the Insert button** on the menu bar to create a new record. The system generates a Transaction number (client decides format and starting point).
2. Enter a description of the return. Usually describes the reason materials are being returned to the warehouse. Use the notes capability for details.

3. Choose a warehouse from the drop-down list or type in a name. When the warehouse has been chosen, the Releases button becomes highlighted under the Load icon on the right side of the screen.

4. Zoom to select a release from the list.

5. Zoom the Return To field and select a warehouse staff person to receive the returned item(s).

6. Zoom the Return By field and select the name of the person returning the item(s).

7. Click the Releases button. A list of the releases from this warehouse becomes available. FacilityFocus will populate the record rows with all the data from the release. You may then delete any item row that is not being returned to the warehouse.

8. The Inventory Part field will fill with the items from the release. The Description likewise comes over from the original release.

9. MSDS Icon: If an item selected has an MSDS designation as part of its inventory information, a skull and crossbones will appear beneath this icon.

10. Bin Location should also fill in based on the original release. Zoom or key in to select a bin if one is not there by default or you wish to return the item to a different bin.

11. Work Req, Phase, UOM: These fields are populated with information from the original release. They cannot be edited.

12. Quantity: A defaulted number will already populate this field from the original release. Edit this field by entering a quantity to return to stock.

13. Unit Cost, Sub Total, Date Needed: These fields are populated from information based on the original release. They cannot be edited.

14. Work Code: This field is populated from information based on the original release. You may edit this field to change the code.

15. If you wish to entire transfer hr OK, if only a part needs to be returned then input in the QTY field how much is being returned.

16. SAVE the record. This action subtracts quantities and amounts from the work request phase and increases inventory.
CREDIT CARD MATERIALS PURCHASES

Use this screen to enter credit card transactions for inventory or non-inventory items.

Path: Purchasing and A/P Module / Purchasing / Entry / Orders / Credit Cards

1. Click the Insert button on the menu bar to create a new record. The system generates a Transaction number and sets up the transaction type as a C type (Contractor Catalog) in the line item portion of the screen. **NOTE:** If you are purchasing a non-stock item, change the type to N for non-stock. In this case you do not need to enter a contractor and you can free-form the Supplier Part and description.

2. Statuses are user-definable. You can have as many statuses as you want but they must be tied to the four system statuses of: OPEN - records with an Open status will not be processed. Material can be added to records in an Open status. FINALIZED - records must be in Finalized status to be processed for material acquisition. CLOSED - the record is closed once the acquisition process is complete. CANCEL - you can cancel the record.

3. Enter a description of the credit card transaction.

4. Reference number for this transaction may default if set up by the System Administrator. This 15-character user-defined field can be changed if needed.

5. Issuing bank for the credit card. Zoom this field and select a valid bank. Banks are set up in the Bank Summary Information screen in the Purchasing module. See your System Administrator for information.

6. Zoom the Account field and select the credit card account number for the bank chosen in step 5.

7. Currency Code - If a default currency code has been set up by your system administrator, it will appear in this field. In most cases, the default will be USD (United States dollars).

8. Select a shop from the drop-down list. This is the shop requesting the item being purchased by this credit card transaction.

9. Zoom the Shop Person field and select the shop person requesting the transaction.

10. Zoom the Employee field and select the Employee using the credit card to purchase the item.

11. Enter a name in the Approved By field. This is a free-form field and not mandatory.

12. Contractor - Contractor providing the part being purchased. Not mandatory if the type is N (for non-stock). See the NOTE on item 1 above.

13. The Address Code for the contractor will default based on your selection of a contractor in step 12.
14. The Placed by and Placed on fields are system generated and non-editable. Today’s date and the user’s ID auto-populate these fields.

The Line Item section in the lower portion of the screen is where the materials are entered.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transaction number</td>
<td>The first column is a system provided transaction number.</td>
</tr>
<tr>
<td>Part Type</td>
<td>I = in stock material, N = non-catalog, and C = catalog</td>
</tr>
<tr>
<td>Supplier Part</td>
<td>Purchased to replace the inventory part.</td>
</tr>
<tr>
<td>Supplier Description</td>
<td>Supplier’s name for the part.</td>
</tr>
<tr>
<td>Supplier UOM</td>
<td>Unit of Measure</td>
</tr>
<tr>
<td>Supplier Unit Cost</td>
<td>The cost of one unit</td>
</tr>
<tr>
<td>Supplier Quantity</td>
<td>The number of units charged.</td>
</tr>
<tr>
<td>Tax1</td>
<td>State, local or other tax calculated from the values set up for the contractor address or from the global system settings entered at setup.</td>
</tr>
<tr>
<td>Tax2</td>
<td>A federal tax or other tax calculated from the values set up for the contractor address or from the global system settings entered at setup.</td>
</tr>
<tr>
<td>Issue Factor</td>
<td>Number of items making up one unit of the supplier part (e.g., issue factor for a carton of eggs is 12).</td>
</tr>
<tr>
<td>Inventory Part</td>
<td>Code that represents the inventory part that needs replacing. System generated if there is an internal inventory equivalent.</td>
</tr>
<tr>
<td>Description</td>
<td>Description of part charged. System generated based on Inventory Part number above.</td>
</tr>
<tr>
<td>UOM</td>
<td>Unit of Measure</td>
</tr>
<tr>
<td>Quantity</td>
<td>Number of items needing replacement.</td>
</tr>
<tr>
<td>SubTotal</td>
<td>Product of unit price multiplied by quantity.</td>
</tr>
<tr>
<td>Total</td>
<td>Sub Total plus taxes.</td>
</tr>
<tr>
<td>Sub Ledger</td>
<td>Identifies the selected FacilityFocus system subledger account (material, labor, equipment or contract) for monitoring expenses. Use Materials as the default.</td>
</tr>
<tr>
<td>Ext Ref</td>
<td>A validated zoom field where you may select a value that will be available to be passed to an interface file, such as a PeopleSoft interface file. The list of values available for this field are created in the Systems Administration module data setup screen for purchasing.</td>
</tr>
<tr>
<td>Purchase Date</td>
<td>Specific to a line item in the transaction, click this zoom field to select a date of purchase.</td>
</tr>
</tbody>
</table>

15. When you have completed all the data entry, change the status to FINALIZED.

20. SAVE the record . This action makes the transaction available to the disbursement screen where the costs will be charged to the job.
SPECIAL ORDER MATERIAL REQUEST (NON-STOCK ONLY)

Path: Purchasing and A/P/ Purchasing/ Entry/ Material Request

Steps

To begin entry click on the Insert button, in the REQ CODE field replace number with the Special Order Number. In the description field enter a synopsis of the order. Fill in the WORK REQUEST, PHASE, and DATE NEEDED fields with correct information.

Also fill in the following fields:

- INV- enter “N”
- CONTRACTOR
- SUPPLIER PART
- DESCRIPTION
- U/M
- SUPP COST
- SUPP QTY
- ISSUE FACTOR
- STATUS

When all fields are filled in correctly save record by pushing the SAVE button.
AUTOMATED INVENTORY RE-STOCK SCREEN

This screen will generate P.O.’s to maintain the required quantity on hand to satisfy demand (based on all or a subset of finalized Pick Tickets) on a future target date. Your contractor catalogs must already be set up to use this function.

Path: Inventory and Equipment Module / Inventory Management / Entry / Automated Inventory Restock screen

1. Insert a new record by clicking the Insert icon on the menu bar.
2. Select a Warehouse from the drop-down menu.
3. Select a P.O. type from the drop-down menu. In the general case, select RESTOCK.
4. Zoom the Date Needed field and select a target date on which you want the desired inventory available. (You may wish to generate this report monthly on a date certain or quarterly, for instance, depending on your budgeting/purchasing processes.)
5. SAVE the record. The Generate button will become available (black letters).
6. Click Generate to begin the processing.

FacilityFocus determines whether a part needs to be reordered, and how much to order, using the following formulas:

Reorder Value = (Qty On Hand + Qty On Order – Qty Committed) for part in Warehouse

Reorder part if: Reorder Value <= Reorder Level for part in Warehouse

In addition, if (Reorder Value + Reorder Qty) > Reorder Level, FacilityFocus will reorder using Reorder Qty. If, however, (Reorder Value + Reorder Qty) <= Reorder Level, FacilityFocus will reorder using (Reorder Level – Reorder Value) + Reorder Qty.

FacilityFocus will select contractors based on contractor preference from the Contractor Catalog which also supplies the line item details. You may edit a number of the fields in the resulting line item rows as long as you are in update mode and have not finalized the processing.

7. SAVE the record when you have completed all the editing. The Finalize button becomes available (black letters).
8. Click the Edit icon to begin Update mode. You are now ready to have FacilityFocus cut the P.O.’s for the line items.
9. Click the Finalize button. A decision window will pop up asking if you wish to continue.
10. Click Yes to continue.

FacilityFocus will develop the P.O.’s and will populate the PO Number field at the end of each line item row. If items are being ordered from the same contractor, all will be consolidated into one P.O.
You may view the finalized P.O. in the Purchasing and AP module.

NOTE: Only authorized users with approval authority should be set up to process P.O.’s in the new autogenerate screen, since P.O.’s are placed in the FINALIZED status when they are processed.
INVENTORY ADJUSTMENT

Once the inventoried part has been set up in the Enterprise Master screen, a quantity and cost should be set up so that workers can immediately begin depleting stock for their work requests. It is recommended that a physical count be taken just prior so that the amounts are current and correct. Once these amounts have been entered, additions take place through the purchasing process to replenish stocks, or through adjustments made directly in this screen.

Path: Inventory and Equipment / Entry / Warehouse Transactions / Inventory Adjustment

8. SAVE the record by clicking the icon on the menu bar.
EXTERNAL INVENTORY ADJUSTMENT SCREEN

To adjust inventory quantities, use this screen, typically after you have run a cycle count and confirmed your quantities or otherwise know your shelf quantity is not correct.

Path: Inventory and Equipment Module / Inventory and Equipment / Warehouse Transactions / External Inventory Adjustment Screen

- 1. Click Insert on the menu bar to create a new record. A new blank record line will appear on the screen with a system-generated transaction number assigned.
- 2. Select a Warehouse from the drop-down box.
- 3. Zoom the Inventory Part field and select a part.
EXTERNAL CHARGES POSTING

The external charges screen in FacilityFocus will be used when material labor, equipment or contract cost information data cannot be entered directly in the system by the worker. An example is Banner cost accounting data for materials that needs to be posted against the work request in FacilityFocus. A flat file (Excel spreadsheet or the like) can be created and made available to the External Charges screen for upload.

Please review the External Charges Posting in MobileFM (PDA processing) later in this SOP.

Open the External Charges screen in the Finance module.

Path: Finance Module/Finance/Entry/External Charges

- 1. To enter a new charge, click on the insert button on the menu to start a new record.
- 2. Enter the Work Request number and Phase. These fields are Zoom fields, so select from the lists.
- 3. Enter an Amount.
- 4. Type in a description of the charge in the Description field.
- 5. In the Inv No field, enter a PO# or other unique identifier to track the transaction.
- 6. Scroll to the Sub Ledger field and choose a subledger type from the drop-down box. The most often used is Material.
• 7. SAVE the record. The next step is to Post the new records.

• 8. At the bottom of the External Charges Screen, press the Post Charges button. You will receive the following message:

![Post Charges]

• 9. Click Yes to continue the posting. At the conclusion of this process, the following message will appear:

![Post Charges]

You are able at any time to see those records in this screen that have and have not been posted. Scroll to the right to view the Posted column.
**SERVICE CONTRACTS**

Service contracts are time and materials contracts with outside vendors/contractors to provide recurring maintenance services, such as elevators, pest control, and the like. Enter new contracts when you receive them properly executed.

**Service Contracts Screen.**

**Path:** Contracts and Contractors / Contracts / Service Contracts / Service Contract Entry

1. **Contractor:** Select a contractor from the zoom list. If the contractor is new, add this vendor in the Contracts and Contractors module, and then return to this screen where the vendor will now appear in the Contractor zoom list.
2. **Select a contract type from the drop-down list in the Type field.** NTE, Lump Sum, and the like.
3. **Select an address code from the zoom list, if one does not default.**
4. **The status will default to PENDING and you may save, reopen and edit this record until you are ready to activate this Contract to the system.**
5. **Enter Date From and Date To, which are the start date and end date of the contract.**
6. **Enter the Contract Number in the Contract No. field.**
7. **Enter your T&M rates in the NOTES field for future reference.**
8. **Change the status to ACTIVE to indicate to the system that the contract has been awarded. This status can be updated to CLOSED when the work is completed.**
9. **Enter the Award Amount and the Award Date.** Once the status of the contract is changed to Awarded, this number cannot be changed.
10. **Save the record at the completion of data entry.**
Other fields on this screen may default based on the user’s login or may be completed by the user but are not required for this process. These fields are described in the following table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Currency Code</strong></td>
<td>If a default currency code has been set up by your system administrator, it will appear in this field. In most cases, the default will be USD (United States dollars).</td>
</tr>
<tr>
<td><strong>Bid or Negotiated</strong></td>
<td>Radio buttons indicating whether the contract is secured through bid or negotiation. Selecting Bid activates the Bid button (right side of the screen) that opens the Bid Window.</td>
</tr>
<tr>
<td><strong>Retainage Type</strong></td>
<td>Radio buttons to enable setting the Retainage Type field to “Dollars” or “Percentage.”</td>
</tr>
<tr>
<td><strong>Retainage</strong></td>
<td>If Retainage Type is Dollars, the retainage amount cannot be greater than the contract award (Award Amt. field) amount. If Retainage Type is Percentage the retainage amount cannot be greater than 100.00 (maximum two decimal places provided).</td>
</tr>
<tr>
<td><strong>Award Date</strong></td>
<td>Date the contract is awarded. When a contract has been awarded, enter the Award Date in this field.</td>
</tr>
<tr>
<td><strong>Date From</strong></td>
<td>Contract’s effective date range. Date From is a required field. When the record is saved, the system validates that the contract expiration date (Date To) is prior to or equal to the Expiration Date on the Contractor screen. When a contract is awarded, enter the Date To information in this field.</td>
</tr>
<tr>
<td><strong>Date To</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Est. Amt.</strong></td>
<td>Estimated amount of the contract.</td>
</tr>
<tr>
<td><strong>Phase Act.</strong></td>
<td>Actual amount invoiced by the contractor. This number is calculated by FacilityFocus based on the vendor invoice payments that have been posted.</td>
</tr>
<tr>
<td><strong>Mod. Amt</strong></td>
<td>Modified amount as determined by the total of all Change Orders for this contract.</td>
</tr>
<tr>
<td>Field</td>
<td>Explanation</td>
</tr>
<tr>
<td>------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Total</td>
<td>System-generated running total of charges against contract amount.</td>
</tr>
<tr>
<td>Invoiced</td>
<td></td>
</tr>
<tr>
<td>Paid</td>
<td></td>
</tr>
<tr>
<td>Balance</td>
<td></td>
</tr>
<tr>
<td>MAU, Campus, Property</td>
<td>Location hierarchy for the contracted work. If this hierarchy is properly</td>
</tr>
<tr>
<td></td>
<td>defined in System Administration, entering the property automatically fills</td>
</tr>
<tr>
<td></td>
<td>the MAU and Campus fields.</td>
</tr>
<tr>
<td>Type</td>
<td>Select a work type from the drop-down box.</td>
</tr>
<tr>
<td>Category</td>
<td>Select a work category from the drop-down box.</td>
</tr>
<tr>
<td>Work Code</td>
<td>Select a work code form the drop-down box.</td>
</tr>
<tr>
<td>Copy Serv.(s) Button</td>
<td>Note that if services have been defined for the contractor, a system</td>
</tr>
<tr>
<td></td>
<td>message will pop up indicating that you will be required to list at least</td>
</tr>
<tr>
<td></td>
<td>one before FacilityFocus will save the record. Click the Copy Serv.(s)</td>
</tr>
<tr>
<td></td>
<td>button to associate services to the contract.</td>
</tr>
<tr>
<td>Distribution Button</td>
<td>Before FacilityFocus will save the record during initial data enter, an</td>
</tr>
<tr>
<td></td>
<td>account distribution is required. Please refer to the Distribution Button</td>
</tr>
<tr>
<td></td>
<td>detail below for more information.</td>
</tr>
</tbody>
</table>

The contracts group will manage this process. Enter all contracts and any non-contract/optional change orders (lump sum) to ensure that funds are allocated to all work against a particular service. Before completing any work request phase, and before posting any charges, change the account in the distribution screen for the phase to reflect the correct account for posting. Change Order: Total Amount

The total of the Service Contract can be changed by clicking the Ch Ord button on the Service Contract screen.
The Seq is autopopulated sequentially by FacilityFocus. In Update mode, enter the following information:

1. Enter your change order number and any amendment number.
2. The Date defaults to today and this can be changed.
3. Enter the amount of the change order. If the amount is being decreased, enter a negative sign before the number.
4. Select a Reason from the drop-down list.
5. Zoom the Work Request field and select one from the list. A work request and phase is required unless you are entering a Lump Sum CO for optional services, for reporting purposes.
6. Zoom the Phase and select one from the list.
7. Save the record.

**CHANGE ORDER SCREEN: END DATE**

To change the end date of a contract, open the Service Contract End Date CO screen:
**SERVICE CONTRACT INVOICE ENTRY**

Business Operations will use this screen to set up invoice records presented to your organization for payment. These invoice records reference previously created Work Request Phase records associated with a contractor and can be for time and/or material. When an invoice is created, the system will check to make sure the underlying contract has not expired by comparing today’s date with the Date To field on the contract record.

Path: Purchasing / Accounts Payable / Service Contract Invoice / Service Contract Invoice Entry

<table>
<thead>
<tr>
<th>Description</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

1. Click the Insert button on the menu bar to create a new record. The system generates a Transaction number.
2. Contractor: Select a Contractor from the zoom list.
3. Address Code: Select an Address Code from the zoom list, if one has not defaulted. NOTE: Contractor Address Codes and Address Types are associated via the Contractor Screen which defines physical addresses by types, such as billing, invoicing, and so forth. The address code that appears on this screen is the one associated with invoicing by the Address Type.
4. Contract No.: Select a contract from the zoom list. If the contract does not appear in the zoom list, the underlying contract has either not been entered into the system or has not been set to a status of APPROVED.
5. Enter the Approver’s login in the Approver field (label on this field is Sum Bill No currently).
6. Invoice No.: Enter the invoice number provided on the contractor’s invoice.
7. Invoice Date: Enter the date of the contractor’s invoice.
8. Select a status appropriate for the action. To release the invoice for posting, for instance, change the status to Released.
• 9. Work Request: Work Request with which the invoice is associated. The system limits selection of work requests to those that have a phase contract that matches the contract entered on the invoice header and a phase status of AP Ready.

• 10. Work Request Phase: Work request phase paid on the invoice. A Work Request displaying no phases may indicate that no phases have an A/P Ready Status. Open the Work Request Entry screen, retrieve the Work Request record, and switch to Edit mode to change the Phase Status to an A/P Ready one. Save the record and return to the Service Contract Invoice Entry screen and Zoom the Work Request field again. Phases should now display.

• 11. Description: May default from the phase number; if not enter a description.

• 12. Amount: Enter the line item amount from the contractor’s invoice.

• 13. Accepted Amount: Enter the amount you are accepting on this invoice.

• 14. Tax: Enter tax from the contractor’s invoice or as you have calculated it. The Amount and the Tax are automatically calculated by the system and entered into the Total field for the item.

• 15. SAVE the record

Other fields of interest on this screen may be entered if required by your process. These are described in the following table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Template</td>
<td>Template (if any) you are using to default the values on the entry screen. (See Service Contract Invoice Template Screen, later in this chapter.)</td>
</tr>
<tr>
<td>Invoice Total</td>
<td>Non-editable fields that roll up from the line items. The system ensures that the total of invoiced amounts plus the current invoice is less than or equal to the award amount plus modifications less Retainage amount (described below.)</td>
</tr>
<tr>
<td>Retainage</td>
<td>If the associated contract is at an ACTIVE status the screen displays a value in the contract Retainage field. If the contract is at a Released status, no Retainage is displayed. If the Retainage type is in Dollars the system displays the dollar value. If the Retainage type is in percent (‘P’) the system calculates the Retainage amount by dividing the Award Amount by Retainage. Retainage values are set up on the Service Contract Entry screen, described earlier in this SOP.</td>
</tr>
<tr>
<td>Auto-generated</td>
<td>Indicates that the Service Contract Invoice Entry Record was generated using the Service Contract Invoice Template and Generator screens (discussed later in this chapter). The system checks this checkbox automatically when the invoice is created via the Generator screen.</td>
</tr>
</tbody>
</table>
### Field | Explanation
--- | ---
Tax Cd | Indicates tax information for the invoice.
Suppl Data | Displays additional information about the invoice.
Auth. No | Authorization number and Authorization date relate to corresponding fields on the Work Request screen More window. If your organization requires authorization, enter an authorization number or edit the existing number, if needed.
Auth. Date | This is the authorization date.
Terms | Opens a window that displays and allows edit of terms of the contract presented for invoicing. Term codes have to be defined on the Contractor Screen Contract Terms window before they can be selected here. Values default to the values defined for the selected Terms code, but can be edited here. See Service Contract Invoice Entry Screen Terms Window, later in this chapter.
SERVICE CONTRACT INVOICE ADJUSTMENT SCREEN

Use this screen to correct entries made in error on the Service Contract Invoice screen.
Path: Purchasing and AP Module / Purchasing / Entry / Accounts Payable / Service Contract Invoice / Service Contract Invoice Adjustment

1. Perform a search and find to locate the original transaction. Click the Edit icon.
2. Use the Backout button to backout the entire amount automatically, or enter an amount (plus or minus). Taxes are also editable.
3. Save the transaction.

Adjustments do not alter the original invoice transaction totals, but you may view the transaction history for the latest information.
MATERIALS PURCHASING COST CAPTURE

For ordering materials using a P.O., this process involves three screens: The Purchase Order Transactions screen to enter the PO information, the Purchase Receives screen to receive the items purchased, and the Disbursement screen to distribute the items to a work request and/or to the warehouse (if the item has been set up in a warehouse bin).

For ordering materials using a credit card, this process involves two screens: The Credit Card Transaction screen and the Disbursement screen. This process does not require a “receiving” step, since the item is received at the point of purchase.

Flowchart of Purchasing

Initiating Event

Technician will usually go to vendor and buy using a credit card. Data entry into the system will take after the fact.

If purchase is by Credit Card

Credit Card Transaction Screen

OPEN FINALIZED

Disbursement

FINALIZED RECEIVED

If the purchase is by Purchase Order

Purchase Order Transaction

OPEN APPROV

Approval

READY FINALIZED

Receiving

FINALIZED RECEIVED

Disbursement

All credit card purchases will be reconciled internally from the credit card statement and a report from the system.
This concludes the setup of the serial numbers for the inventoried equipment.

**NAVIGATION TECHNIQUES**

The FacilityFocus system is designed to make easy access to the information. A number of standard windows techniques are introduced in this section to help the user get started. When the user first opens a module, the screen will show a template where information will be entered and viewed. This template is mostly empty (except for today's date) when it first opens - the user must tell the system what to retrieve or what action to prepare for. This rule applies to every module in the system.

**Search and Find**

One of the most common retrieval techniques is to perform a search, then a find.
FILTERED SEARCH AND FIND

To retrieve only a subset of the records available to you, perform a Filtered Search and Find operation. After clicking the search button, the screen below appears with no data in any of the fields. The system provides an opportunity at this point to enter data (called “criteria” at this point) into any of the fields, or any number of fields, and will retrieve only those records that meet the criteria.

1. Enter a work request number in the Work Req field. Since WR numbers are unique, you need only enter this one criteria to find the record.

2. Click the Find button to complete this operation.

Another example:
To retrieve all Work Requests entered into the system on May 15, 2002, enter 05/15/2002 in the Entry Date field.

Click the Find button to complete this operation.

To search by two criteria, such as MAU and Campus:
- 1. Click on the Search button
• 2. Enter information in the MAU and Campus fields.
• 3. Click on the Find button.

FacilityFocus retrieved all the records that met the multiple criteria.
**COMPARISON CRITERIA**

Use comparison criteria to further limit the number of records. Examples of comparison criteria are:
- a series of characters you want to match
- a work request number
- an expression such as, LIKE %TOO HOT% in the title field

FacilityFocus compares the records in the database with the values you enter and displays records meeting those criteria.

**Comparison Operators**

A comparison operator is a sign used in comparison criteria to compare two values. The eight standard comparison operators appear below.

<table>
<thead>
<tr>
<th>Operator</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>=</td>
<td>Equal to.</td>
</tr>
<tr>
<td>&lt;</td>
<td>Less than.</td>
</tr>
<tr>
<td>&gt;=</td>
<td>Greater than or equal to.</td>
</tr>
<tr>
<td>!=</td>
<td>Not equal to.</td>
</tr>
<tr>
<td>like</td>
<td>Like (Wildcard = %)</td>
</tr>
<tr>
<td>not like</td>
<td>Not like (Wildcard = %)</td>
</tr>
</tbody>
</table>

**NOTE:** Comparison criteria are case-sensitive.

The format for comparison criteria is:

First Value Operator Second Value

For example:

City = San Antonio

The expression above will bring up all the records listing San Antonio in the City field.

**Setting up a Custom Filter**

A custom user filter may be set up in any entry screen.

1. For our example, we are creating a filter to load all open plumbing work requests. Open the Work Management module and navigate to the work request entry screen. From this entry screen, click the User Filter icon on the toolbar. The filter setup screen will appear.
2. Click New. You will be prompted to enter a Filter Name - for example, PLUMBING NEW.
FacilityFocus then opens the entry screen. Your filter name will appear at the top of the screen and the fields will be blank.

4. Enter the criteria you wish to associate to this filter.

5. Click Exit. You will be asked if you wish to save the filter. Click Yes.

You may edit or delete the filter in the same fashion using the options available in the filter screen.

**Search Using a Custom Filter**

1. With the blank Work Request entry screen open, click the search button. A small window will appear that looks like the one below.
Pre-defined filters are designed to save time during the search and find operation. Click (None) to select all WR's. This is the default setting.

**Browse**

In this example, there are 42 records. You may click on the arrow keys at the top of the screen to look at each record individually, which will take time. You may also have in mind one particular record in the group. To view a list of retrieved records and then look at a particular one in the list, follow these steps.

1. With the retrieved records loaded and ready to view, click on the Browse button. A Browse window will appear that lists all 42 records in Work Request number order.
2. Select one from the list and double click it. The Work Request will appear on the screen.
Enhanced Browse Functionality
The Browse window provides advanced sorting, with drag and drop capability. The Browse window will automatically launch when a set of records is retrieved. You can also click the icon in the menu.

Zoom Field Quick Selection Feature
Zoom fields offer the ability to view a scrolled list of available selections to choose from, and the list can be unlimited. If a large number of sections are available, you may enter one or more characters in the Quick Selection field on the Zoom window. FacilityFocus will navigate to the first selection matching your characters, as shown below.
2. Update your record. If information already exists in a field, click anywhere in the field to select all the data, then select Edit/Cut from the menu to erase the existing information. Or, after clicking to highlight the data, click again anywhere in the text to activate a cursor. Use the backspace or delete keys to erase the existing information.

3. Click the Save button when you have finished.

**NOTE:** Updates may be made to records that are in the OPEN status, but other statuses may prohibit this type of action. Be sure the record is in a status that allows updates.

**Save**

Saving the information that has been entered updates the data tables in the database. Until the save operation takes place, no changes, additions or new records will be added to the database.

To perform a SAVE operation, click the Save button located on the menu bar.

**Insert a New Record**

1. Open the module and the blank screen of your choice. Click the Insert button on the menu bar.
2. Enter the new record.
3. Click the Save button when you have finished.

**Refresh the Screen after a SAVE operation**

While you are in a particular screen, others may be making changes to the underlying data tables, since all transactions, updates, deletions and additions take place throughout the day in real time. To make sure you have the latest information, especially if you are aware that updates are being made concurrently by other users, refresh the screen you are currently in to update to the latest set of data.

Click on the Reload Lookup icon on the menu to refresh the data. If you earlier performed a search and find, repeat this operation to include anything new.