UConn Now for Crew Supervisors v 3.0

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Introduction

The UConn Now Crew Supervisor Dashboard is a tool that supplements the out of the box of FAMIS capabilities. Version 3.0 of the UConn Now Crew Supervisor Dashboard is notable for:

1. Mobile Responsive design,
2. the ability to UPDATE data, such as assigning work orders, where previous versions were READ-ONLY, and
3. the ability to toggle between viewing all work or work distributed by Preventive and Reactive maintenance, and
4. additional metrics such as Total Active work orders and Recent Complete counts

Access

To access Version 3.0 of the UConn Now Crew Supervisor Dashboard go to:

Development (https://famis.dev.uconn.edu/uconnNow/facOps/crewSupers.php)
Test (https://famis.test.uconn.edu/uconnNow/facOps/crewSupers.php)
Production (https://famis.prod.uconn.edu/uconnNow/facOps/crewSupers.php)

Or you can always access resources via the UConn Now menu on famis.uconn.edu. Look for the “Facilities and Building Services Crews” option on the drop down menu.

If you attempt to reach the page and receive an Unauthorized Access message, please send a message to FacilitiesIT@uconn.edu (mailto:FacilitiesIT@uconn.edu) requesting access. Be sure to include your name, email address, netid and reason for requesting access.
Getting Started

There are two views of UConn Now: By Trade or Shop or By Residential Area. Both views have a current state based on the trade or area shown in the title bar of the Current State block. Both views have an aging area. Both views have a Work Assignment area, however the trade view is by individual assignment while the Area view is by crew assignment with specific treatment given to the RES MNTC and CUSTODIAL crews.

Trade or Shop View of UConn Now

Residential Area View of UConn Now
Current State

The area shown here is referred to as the Current State section of UConn Now.

The title bar of the Current State displays the number of total active work orders for the selected crew or area. Active is defined as having a status of OPEN, ASSIGNED or PARTS.

Each title bar also contains toggle buttons. The down toggle is available when the display is showing all maintenance types counted together.

To separate the data into Preventive and Reactive click the down toggle:

The up toggle is available when the display is showing the maintenance types counted separately.

To join the data back together for counting click the up toggle:

If the Priority button label is “Priority” the number indicates the number of Active Work Orders for that Crew or Area that have been set the highest available priority level.

Clicking this button launches the corresponding FIT table.

If there are two buttons, one prefixed with “R-” and “PM-” the “R-” stands for Reactive but actually includes any highest priority work order that is of any type other then Preventive. The “PM-” stand for Preventive and includes all highest priority work orders that are of maintenance type PREVENTIVE. (FOBS business processes make it highly unlikely that any PREVENTIVE work will be highest Priority)

Clicking either of these buttons launches the corresponding FIT table.
If the New button label is “New” the number indicates the number of Work Orders for that Crew or Area that have been created since 3pm the previous day.

If there are two buttons, one prefixed with “R-” and “PM-” the “R-” stands for Reactive but actually includes any work order created since 3pm the previous day that is of any type other then Preventive. The “PM-” stands for Preventive and includes any work orders created since 3pm the previous day that are of maintenance type PREVENTIVE.

If the Parts button label is “Parts” the number indicates the number of Work Orders for that Crew or Area that currently have the status of PARTS.

If there are two buttons, one prefixed with “R-” and “PM-” the “R-” stands for Reactive but actually includes any work order in the status of PARTS that is of any type other then Preventive. The “PM-” stands for Preventive and includes any work orders in PARTS status that are of maintenance type PREVENTIVE.

If the Unassigned button label is “Unassigned” the number indicates the number of Work Orders for that Crew or Area that currently are not assigned.

If there are two buttons, one prefixed with “R-” and “PM-” the “R-” stands for Reactive but actually includes any work order that is not assigned that is of any type other then Preventive. The “PM-” stands for Preventive and includes any work orders not assigned that are of maintenance type PREVENTIVE.
There is a section of buttons labeled *Past week*. It contains the number of work orders opened, the number set to complete and the number set to closed during the last seven days. Like the other Current State buttons, these toggle between all and the Preventive / Reactive split.

Clicking any of these buttons launches the corresponding FIT table.

The last section of the Current State is not clickable. It displays the number of work orders that were opened and closed for that Crew or Area for the current Fiscal Year.

**Aging Work Orders**

Initially the *Aging Work Orders area* shows the counts for active work orders (OPEN, ASSIGNED, PARTS) in various date ranges of aging.

Clicking on any of the yellow bars launches the corresponding FIT table.

To separate the data into Preventive and Reactive click the down toggle

Clicking on any of the yellow bars launches the corresponding FIT table.

Note: The date range indicates that a Work Order is still active and the number of days since it was created until today is within the specified range.

Example: If the date today is *July 21, 2016* then the 3 in the PM 150+ days indicates there are three active work orders for this trade/shop or residential area that were created prior to *Feb 22, 2016*
Work Order Assignments

The By Trade or Shop Work Order Assignments section shows each individual in the crew with a corresponding bar sized relatively in the crew and showing the number of work orders assigned. The stripping in the bar indicates the proportionate area of PREVENTIVE work orders. The lighter blue area indicates the number of other active work orders where the individual has performed labor but is not the primarily assigned worker.

Clicking on any of the blue bars launches the corresponding FIT table.

In the upper right corner of the Work Order Assignment title bar is a building toggle. Clicking this switches the Assignment view to by Building. As with the individual assignments the bars are sized proportionately and the stripping indicates the proportion of PREVENTIVE work orders.

Clicking on any of the blue bars launches the corresponding FIT table.

To switch back to the by Individual view click the Individual Assignment toggle button in the upper right corner of the Work Orders by Building.

The By Residential Area Work Order Assignments section shows each crew with work in the area with a corresponding bar sized relatively in the area and showing the number of work orders assigned. The stripping in the bar indicates the proportionate number of PREVENTIVE work orders. Due to business process, special consideration is given to the RES MNTC and CUSTODIAL shops so they will show at the top and in a lighter blue if they have work order assignments.

Clicking on any of the blue bars launches the corresponding FIT table.
In the upper right corner of the Work Order Assignments title bar is a building toggle. Clicking this switches the Assignment view to by Building just like the Shop view. To go back to the Work Order Assignments by shop click the toolbox toggle button in the title bar.

**Fast Information Tables**

The *Fast Information Table* is a table that responds to actions performed on other areas of the UConn Now Dashboard. When clicking on any of the buttons on the UConn Now Dashboard a FIT launches.

Parts of the Fast Information Tables (FITs)

The title describes the contents of the FIT along with displaying a date/time stamp.

- Clicking the *Print Selected WOs* button prints any work order with its corresponding box checked.
- Clicking the *Export to Excel* button exports the contents of the FIT to an Excel file.
- Clicking the *Refresh Print Flag* resets any checked work orders to “not printed” which is indicated by the presence of a printer icon at the start of the row.
To close the FIT without performing any updates, click the close X in the upper right corner.

Type any word in the Search box and the table will be narrowed to contain only rows that contain the work.

When working on a mobile device, sometimes screen size is a constraint. To hide some of the columns of the FIT to better view the necessary data, uncheck their column header name from the *keep open control.*

Each column that is sort-able has the up and down triangles that allow toggling between ascending and descending order.
If a Work order has not yet been printed it will show the printer icon at the beginning of the row. Clicking this will generate the Work Order ticket to be printed and will mark the work order printed.

To see more details of a particular work order, click the Work order identifier, which is a link indicated by blue text.

If the room number is blue it indicates that a Visual Map floor plan drawing is available for that room. Click the link to launch the floor plan viewer.
The Floor Plan Viewer, known as Visual Map, will default to the room where the work is located. The room should be highlighted

The footer of each FIT shows the count of records matching the criteria of the FIT and any filters created by using Search box.

**Updating Work Order Data**

If a work order is assigned to the crew that the current user is part of, some of the work order data will be editable.

A status can be changed if the value in the Status column is a drop down list.
When a Work Order is changed to ASSIGNED, a selection list with all members of the Work Order’s crew is presented. Click the radio button next to the name of the individual to be assigned the work. Click the **Set Assignment button**.

It is uncommon to assign a work order to someone not in the list. If that is a necessary, click the radio button next to the **OTHER:** option and type in the NETID of the individual to be assigned.

The FIT will have no rows immediately following the re-assignment while it refreshes the system and rebuilds it’s contents. Once the FIT re-populates it is good to continue with data updates.

A Work Order in an **ASSIGNED** status can be assigned to a different worker. Click the **marker icon** next to a worker’s netid in the **Assigned to** column to pick a new worker from the list.

To **COMPLETE** a work order, select the COMPLETE status from the drop down. The next window confirms the work order is being set to complete and collects comments about the work completion. These comments are visible to the requester of the work. Once the comments are entered, click the **Complete Work Order** button.
To CANCEL a work order, select the CANCELED status from the drop down. The next window confirms the work order is being set to canceled and collects comments about the work cancellation. These comments are visible to the requester of the work. Once the comments are entered, click the Complete Work Order button.

To put a work order in PARTS, select the PARTS status from the drop down. The next windows confirms the work order is being set to parts. Setting a work order to parts does not change the assignment of the work order.

IMPORTANT: Upon closing any FIT, the UConn Now Dashboard will refresh to process any changes the current user or other logged in users may have made. Please make sure the refresh is done before performing the next action.