

Standard Operating Procedure

02 - Converting Service Request to Work Order



A. Purpose

This process documents the steps taken to facilitate the entry of a Service Request through the Service Request form.

B. Responsibilities

The following Departments participate in this process and are tasked with the following responsibilities:

➤ **Customer Service/Work Control**

The Customer Service/Work Control is responsible for entering and tracking the Service Requests entered through CAMIS. They will serve as the central contact for initiating work queries for users.

➤ **Maintenance Manager**

The Maintenance Manager is responsible for managing the work initiated through the Service Request.

C. Process Overview

Customer Service/Work Control

Step 1: Request is entered on line by Requestor or is submitted to Work Control Center through phone, skeleton, electronic, verbal or paper request.

Maintenance Manager

Step 2: A determination is made whether the work is a project.

Step 3: A determination is made whether the work will be performed immediately.

Step 4: Immediate requests are scheduled, creating a Work Order.

Step 5: Immediate work is distributed.

Step 6: Immediate work is performed.

Step 7: Non-immediate requests are screened to determine if work will be performed in the future. If approved, not immediate requests will be scheduled.

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Step 8: A determination is made whether the work will be performed.

Step 9: Canceled work will not be performed. Work may not be approved based on duplicate request, insufficient funding or customer withdrawal of request.

D. Process Steps

Customer Service/Work Control

Note: You can use your mouse or the TAB key to navigate through the forms.

Step 1: Request is entered on-line by Requestor or is submitted to Work Control Center through phone, skeleton, electronic, verbal or paper request.

- Access Service Request Form by clicking on the form in the Navigator. (SERVICE REQUESTS/SERVICE REQUEST)
 - ❑ [TAB] out of the SR Number field. (CAMIS will automatically create SR NUMBER when record is saved.)
 - ❑ Enter description of work. (64 characters can be entered)
 - Enter Parent WO Number, if applicable. (Use the List of Values, CTRL/L if needed)
 - Enter Capital Project Number, if applicable (Use the List of Values, CTRL/L if needed)

Requesting Information

- ❑ Enter Requestor Name (Use the List of Values, CTRL/L if needed)
 - Ex: Last Name, First Name
- ❑ Enter Telephone number
 - Ex: XXX-XXXX ext.
- ❑ Enter Department

Alternate Requestor, if applicable

- ❑ Enter Alternate Requestor Name (Use the List of Values, CTRL/L if needed) Ex: Last Name, First Name
- ❑ Enter Telephone number
 - Ex: XXX-XXXX ext.
- ❑ Enter Department

Equipment Information, if appropriate

- ❑ Enter Equipment ID (Use the List of Values, CTRL/L if needed)

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- ❑ Enter Query Mode (*F11*)
- ❑ Enter Query criteria (*Keyword, Manufacturer, Nomenclature or Equipment ID*)
- ❑ Execute Query Mode (*CTRL/F11*)
- ❑ Select the Equipment and click on [OK]

Location Information

- ❑ Enter Site (*Use the List of Values, CTRL /L if needed*)
- ❑ Enter Building (*Use the List of Values, CTRL /L if needed*)
- ❑ Enter Floor (*Use the List of Values, CTRL /L if needed*)
- ❑ Enter Room (*Use the List of Values, CTRL /L if needed*)

General Information

- ❑ Enter Non-Available time (200 characters can be entered)
- ❑ Enter Maintenance Type (*Use the List of Values, CTRL /L if needed*)
- ❑ Enter Priority for Maintenance Work Orders (*Use the List of Values, CTRL/L if needed*)
 - 1 W. O. Emerg (0 days)
 - 2 W. O. High (1 day)
 - 3 W. O. Med (3 days)
 - 4 W. O. Low (10 days)
- ❑ Enter Status (*Use the List of Values, CTRL /L if needed*)
 - APPROVED (Work approved prior to scheduling)
 - HOLD (Work on hold pending labor, materials, etc)
 - REQUESTED (Work requested by user)
 - CANCELED (Work will not be performed)
 - CONV PROJ (Convert a Service Request to a Project Request)
 - DUPLICATE (Track duplicate Service Requests for call volume)
 - REJECTED (Work request has been rejected)
 - SCHEDULED (Work Order will be created automatically by CAMIS)

Please note that the SCHEDULED status will create a Work Order. Do not select SCHEDULED. The Facility Manager for scheduling will screen all Service Requests. Non-immediate requests are entered for historical purposes or future consideration.

Billing Information

- Access the Billing Window by clicking on the [BILLING] button from the Service Request Form.
 - ❑ Select Billing Method

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- ACTUALS (Account Numbers required)
- ESTIMATE (Account Numbers required)
- NO CHARGE (Account Numbers not required)
- ❑ Select Markup Code (Use List of Values, CTRL/L if needed)
- ❑ Select the Account Numbers to Charge (Use the List of Values, CTRL/L)
- ❑ If Account Numbers are not available, new values can be entered. Please contact your local Business Coordinator
 - Account Number: Enter Account Number up to 8 characters, (Use the List of Values, CTRL/L if needed)
 - Subsidiary: Enter Subsidiary up to 2 characters, (Use the List of Values, CTRL/L if needed)
 - Object Code: Enter Object Code up to 3 characters, (Use the List of Values, CTRL/L if needed)
 - Activity Code (not mandatory): Enter Activity Code up to 4 characters, (Use the List of Values, CTRL/L if needed)
- Close Billing Window by clicking on X in upper right hand corner.

Work Plan Information

- Access the Work Plan Window by clicking on the [WORK PLAN] button from the Service Request Form.
 - ❑ Identify Primary Work Plan Assignments
 - Enter Crew (Use List of Values, CTRL/L if needed)
 - Enter Craft (Use List of Values, CTRL/L if needed)(Optional)
 - Enter Task list

Supporting Labor Information, if applicable

- ❑ Identify Secondary Work Plan Assignments (Optional)
 - Enter Secondary Crew (Use List of Values, CTRL/L if needed)
 - Enter Secondary Craft (Use List of Values, CTRL/L if needed)
 - Enter Secondary Task list
- Close Work Plan by clicking on the X in the upper right hand corner.

Facility Manager

Step 2: A determination is made whether the work is a project.

- ❑ [YES] Refer to the SOP 01 Converting Service Request to Project
- ❑ [NO] Proceed to Step 3.

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Step 3: A determination is made whether the work will be performed immediately.

- [YES] Status = SCHEDULED (Use the List of Values, CTRL /L if needed)
- [NO] Status = REQUESTED (Use the List of Values, CTRL /L if needed)

- Access the Service Request Workbench by clicking on the form in the Navigator. (*SERVICE REQUESTS/SERVICE REQUEST WORKBENCH*)
 - Select from the existing folders (*Use the List of Values, CTRL/L if needed*)
- Or**
 - Create new private folder
 - Click on [EDIT] button
 - Click on [DUPLICATE] button to duplicate existing folder
 - Enter the New Folder name (*60 characters can be entered*)
 - Change the order of columns to be displayed (*Use the Move fields up/Move fields down button*)
 - Select the Primary and Secondary order of the columns (*Use the List of Values, CTRL/L if needed*)
 - Select the sorting order (*Ascending or Descending*)
 - Click on the [FILTER] tab to select the criteria: *Crew, Craft, Site, Maintenance Type, Requestor, Maximum Priority, Status, Assign To & Building* (*Use the List of Values, CTRL/L if needed*)
 - Click on [DISPLAY] tab to complete the folder changes
 - Check to see the Private checkbox is checked
 - Select the Service Request to view and click on the [VIEW] button

Step 4: Immediate requests are scheduled, creating a Work Order

Step 5: Immediate work is distributed

- Access the Print option by clicking on the [PRINT] button from the Service Request Form.
 - Click on the OK button to print the selected Work Order **OR**
 - Click on the 'All marked to print for crew' to print for a selected crew
 - Select the Crew (*Use List of Values, CTRL/L if needed*)
 - Check the 'Include Secondary labor ?' box if needed
- Close the Service Request Form by clicking on the X in the upper right hand corner.

Step 6: Immediate work is performed.

- Work is managed through the Managing Work Order process, SOP # 05

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Step 7: Non-immediate requests are screened to determine if work will be performed in the future. If approved, non-immediate requests will be scheduled.

- Service Requests are viewed from the Service Request Workbench.
- Access the Service Request Workbench by clicking on the form in the Navigator. (*SERVICE REQUESTS /SERVICE REQUESTS WORKBENCHE*)
 - Find Service Request by using folders previously created
 - Select the Service Request to view and click on the [VIEW] button
- Close the Service Request Form by clicking on the X in upper right hand corner

Step 8: A determination is made whether the work will be performed.

- Schedule non-immediate Service Request from the Service Request Workbench
 - Select the Service Request to Assign/Schedule and click on the [ASSIGN/SCHEDULE] button
 - Enter Assigned To (*Use the List of Values, CTRL/L, if needed*)
 - Enter Query mode
 - Enter Employee Name, Crew or Craft or Employee ID
 - Execute Query
 - Select Employee by clicking on [OK] button
 - Enter SCHEDULED in Service Request Status (*Use the List of Values, CTRL/L, if needed*)
- Work is managed through the Managing Work Order process, SOP # 05

Step 9: Canceled work will not be performed. Work may not be approved based on duplicate request, insufficient funding or customer withdrawal of request.

- Cancel Service Request from the Service Request Workbench
 - Find Service Request using the folders previously created
 - Select the Service Request to view and click on the [VIEW] button
 - Change Status to CANCELED
- Close the Service Request by clicking on the X in upper right hand corner
- Close the Service Request Workbench

E. Document Control

Questions, suggestions, and corrections should be forwarded to CamisHelpdesk.DCAM@State.ma.us.

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F. Process Flow

