A. **Purpose**

This process documents the steps taken to facilitate the tracking of Work Orders through the Current Schedule form.

B. **Responsibilities**

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

- **Maintenance Manager**
  The Maintenance Manager is responsible for tracking, managing and scheduling the Work Orders entered through CAMIS.

- **Technician/Maintenance Worker**
  The Technician/Maintenance Worker are responsible for performing the work detailed through the Work Order, charging labor & material against the Work Order and reporting.

- **Business or Finance Office**
  The Business or Finance Office is responsible for processing the Purchase Requisition necessary to facilitate the work detailed through the Work Order.

C. **Process Overview**

**Maintenance Manager**

Step 1: Work Order is created.

Step 2: A determination is made whether there is available labor.

Step 3: Work is postponed pending available labor.

Step 4: Work Order is assigned to Crew, Craft, and Employee.

Step 5: A determination is made whether materials are needed.

Step 6: Work is distributed.

Step 10: Work Order is closed.
Step 11: A determination is made whether other work order / project should be closed.

Step 12: Report detailing Work Order costing is printed.

**Technician/maintenance worker**

Step 7: Work is performed.

Step 8: Labor & materials are charged against the Work Order.

Step 9: Work Order is completed.

**Business or Finance Office**

Step 13: Purchase Requisition is created for purchasing materials.

Step 14: Requisition is forwarded to Purchasing.

Step 15: Purchase Requisition is processed.

Step 16: Purchase Order information is forwarded.

Step 17: Materials are received.

Step 18: Vendor is invoiced for purchased materials.

D. **Process Steps**

**Maintenance Manager:**

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

**Step 1: Work Order is created.**

- Access Current Schedule Form by clicking on the form in the Navigator.  
  *(WORK ORDERS/CURRENT SCHEDULE)*
  - Select from the existing folders *(Use the List of Values, CTRL/L if needed)*
- Or
  - Create new private folder
  - Click on [EDIT] button
Step 2: A determination is made whether there is available labor.
- [YES] Work Order is assigned; go to Step 4
- [NO] Work Order is postponed

Step 3: Work is postponed pending available labor.
- Access the Work Order to be postponed from the Current Schedule Form.
  - Select Work Order by clicking on [VIEW]
  - Change the Status = HOLD
- Close the Work Order Form

Step 4: Work Order is assigned to Crew, Craft, and Employee.
- Access the Assign Work Order form by clicking [ASSIGN WO] button from the Current Schedule Form
  - Enter Assigned To (Use the List of Values, CTRL/L if needed)
  - Check the 'Change Status to Assigned' checkbox
- Click on [OK] to close the form

Step 5: A determination is made whether material purchasing is needed.
- [YES] Material is purchased through the Business or Finance Office; go to Step 12
- [NO] Work is distributed
**Step 6: Work is distributed.**
- Access the Work Order by clicking on [VIEW] button from the Current Schedule Form.
- Access the Print option by clicking on the [PRINT] button from the Work Order 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

**Technician/Maintenance Worker**

**Step 7: Work is performed**
- Work is performed based on detailing on the Work Order

**Step 8: Labor & materials are charged against the Work Order**
- Access the Work Order Closing Form by clicking on the [CLOSE WO] button from the Current Schedule Form. *(WORK ORDERS/CURRENT SCHEDULE)*
  - 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, Labor, Maintenance Type, Request Type, Maximum Priority, Status, Assigned To, Building & Include Child Route WOs *(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
    - Check to see the Save Changes checkbox is checked
    - Select [CLOSE WO] to access the Work Order Closing Form
Labor entry
- Access the Labor Charges Window by clicking on the [LABOR] tab from the Work Order Closing Form.
  - Enter Employee ID
  - Work Date defaults to Current Date (Work Date can be changed)
  - Enter hours worked
  - Pay Code and Labor Class will be automatically populated by CAMIS.

Material entry
- Access the Material Charges Window by clicking on the [MATERIAL] tab from the Work Order Closing Form.
  - Enter Part Number (10 characters can be entered)
  - Enter Issue Date
  - Enter Issued To (Employee ID)
  - Enter UM (Unit of Measure)
  - Enter Quantity
  - Enter Price
  - Amount will be automatically calculated by CAMIS based on Qty and Price
- Click on the [MAIN] tab to return to the Work Order Closing information

Step 9: Work Order is completed.
The Technician can complete the Work Order, allowing the Supervisor to actually close the Work Order. This provides a means for supervisors to review prior to closing.

- Change the Status to COMPLETE (Use the List of Values, CTRL/L if needed)
- Close the Work Order Closing form by clicking on the X in the upper right hand corner
- Close the Current Schedule form by clicking on the X in the upper right hand corner.

Maintenance Manager

Step 10: Work Order is closed.
- Access the Work Order Closing Form by clicking on the form in the Navigator. (WORK ORDERS/CURRENT SCHEDULE)
  - Find the Work Orders to view using the folders previously created
  - Select Work Order to be closed by clicking on [CLOSE WO]
  - Change the Status to CLOSED (Use the List of Values, CTRL/L if needed)
  - Completed Date will be automatically populated based on current date
Date Closed to Charges (Labor, Material & Invoices) will be automatically populated
Close the Work Order Closing form by clicking on the X in the upper right hand corner
Close the Current Schedule Form by clicking on the X in the upper right hand corner

**Step 11: A determination is made whether other work order / project should be closed.**

- if all the work orders under a route are closed, the route work order should be closed by repeating Step 10
- If all the Project Phases' work orders are closed, Project Request should be closed through Project Workbench.
- If all the children Projects are closed, Parent Project should be closed through Project Workbench.

**Step 12: Report detailing Work Order costing is printed.**

- Access the Current Schedule Form by clicking on the form in the Navigator. *(WORK ORDERS/CURRENT SCHEDULE)*
  - Select [REPORTS] to access the reporting option
  - Select the report and [RUN REPORT]
  - Enter specific parameter data, if needed *(Case sensitivity, use only uppercase)*
  - Change DEST TYPE to PRINTER
  - Click on [RUN REPORT]
  - Close the Current Schedule Form by clicking on the X in upper right hand corner
Business or Finance Office

Step 13: Purchase Requisition is created for purchasing materials

Step 14: Requisition is forwarded to Purchasing

Step 15: Purchase Requisition is processed

Step 16: Purchase Order information is forwarded

Step 17: Materials are received

Step 18: Vendor is invoiced for purchased materials

E. Document Control
Questions, suggestions, and corrections should be forwarded to CamisHelpdesk.DCAM@State.ma.us.
F. Process Flow

<table>
<thead>
<tr>
<th>Maintenance Manager</th>
<th>Technician/ Maintenance Worker</th>
<th>Business or Finance Office</th>
</tr>
</thead>
<tbody>
<tr>
<td>Work Order is created</td>
<td>Work is performed</td>
<td>Purchase Requisition created for purchase</td>
</tr>
<tr>
<td>Available Labor? Yes</td>
<td>Labor &amp; materials recorded for Work Order</td>
<td>Requisition forwarded to Purchasing</td>
</tr>
<tr>
<td>Work Order assigned to Crew, Craft &amp; Employee Status = Assigned</td>
<td>Work Order is completed</td>
<td>Requisition is processed</td>
</tr>
<tr>
<td>Need to purchase materials? No</td>
<td>Report on Work Order History</td>
<td>Purchase Order information is forwarded</td>
</tr>
<tr>
<td>Work is distributed</td>
<td>Other Work Order / Project is Closed Yes</td>
<td>Materials are received</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Vendor invoiced for purchased materials</td>
</tr>
</tbody>
</table>

CAMIS --Managing Work Orders--