

# CAMIS FY22 Deferred Maintenance User Guide (Non Higher Ed)

DIVISION OF CAPITAL ASSET MANAGEMENT & MAINTENANCE

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#### ACCESSING AND LOGGING INTO CAMIS

To access CAMIS you will use your username and password. Your username is usually your first initial plus last name (John Smith would be jsmith). Your password is defaulted to "password" which you can change.

CAMIS URL <u>HTTPS://CAMIS.DCP.STATE.MA.US</u>

#### **CHANGING PASSWORD**

The Password requirements are:

- Must contain at least 1 lower case letter
- Must contain at least 1 upper case letter
- Must contain at least 1 number
- Must contain a special character
- Must be minimum of 6 characters long

Must not exceed 15 characters long

Step	Action	Result
1	From the Home page, click the link to your name located in the upper right Welcome, Joanne Sullivan	The My Profile page will display
2	Populate the New Password field with your new password.	New password MUST contain a Cap
3	Populate the Confirm Passwordfield with your new password	
4	Click the Save & Close button located at the bottom left of the screen	If successful, you will get a message telling you and you will have to Sign Out and sign back in using the new password. If you are not successful and you do not get a message telling you that, the New Password screen will present itself again with blank fields. (it is most likely that the special character was not recognized so you should try a different special character in your password).



#### NAVIGATING CAMIS

This section will explain what the different symbols mean in CAMIS.

-						
Icon	Function					
6	Opens the linked object in a new window					
>	Page forward when multiple pages are available					
4	Page back after page forward has been used					
ø	Refresh the current page					
*	Displays a complete list that is not displayed (used with Tabs)					
	Collapse the portlet					
🖸 or 🗖	Expand or Maximizes the portlet					
Q	Produces the list of available values with which to populate the field          L-Lease					
8	Removes the value with which a field is currently populated					
	Produces the list of available values with which to populate the field acres acres ares each hectares					
25	Displays a calendar from which a date can be selected to populate the field					



#### HOME SCREEN

Depending on your security role in CAMIS you will access the Deferred Maintenance screens in two ways. If your agency does not use CAMIS for work order management, then your home screen will be the Deferred Maintenance page.

	Welcome, DM User	Log off	About
	Company	Project	<b>&gt;</b>
	Projects		
Home	🗮 Personalize 🛛 📑 Open In New Window	My Boo	okmarks
Deferred Maintenance Quick Links	Deferred Maintenance Project		
Create Deferred Maintenance Record () 5 Year Spending Plan (Higher Ed) () Cashflow Projection Report (Quarterly Update) () All Deferred Maintenance Projects ()	Deferred Maintenance Phase		
Deferred Maintenance Help     CAMN Deferred Maintenance Website ()     CAMN Deferred Maintenance Website ()     Cost Projection Report Training (non Higher Ed) ()     Here Study Template Website     Wes Study Template Website ()     Here Study Presentation ()     Here Study Presentation ()     Here Verification of non Certifiable Projects ()			

If your facility uses CAMIS for work task management, you will need to navigate to the MAINTENANCE tab and then DEFERRED MAINTENANCE.

			Company	Project 🔎
Home   My Reports   Portfolio Maintenance	Projects			
Deferred Maintenance				
Home > Maintenance > Deferred Maintenance	÷	Personalize 🏾 🍟 Open In New Window	🙀 Add to Bookmarks	My Bookmarks
Deferred Maintenance Quick Links	Deferred Maintenance Project			=0
Create Deferred Maintenance Record 😨 5 Year Spending Plan (Higher Ed) 😨 Cashflow Projection Report (Quarterly Update) 📴 All Deferred Maintenance Projects 😭	Deferred Maintenance Phase			=0
Deferred Maintenance Help				
DCAWN Deferred Maintenance Webste () Cost Projection Report Training (non higher Ed) () Here Study Instructions () Here Study Trainiste () Here Study Trainiste Webhare () Here Study Presentation () Here Repuest for Study Certification () Here Verification of non Certifiable Projects ()				



#### **FINDING PROJECTS AND PHASES**

In the Deferred Maintenance window, you will see two portlet queries. One is for the Projects and the other is for the phases within the projects. You can search either query to find, sort and even export your data. Use any of the white "contains" boxes to search any of the fields.

#### Search by J #.

	🗆 Deferred Maintenance Phase 🔤 🖸										
9	Second 1 total found Apply Filters Clear Filters Show:										
	CAMIS Phase Name Location Name		Site	Full Path	Phase Type	Phase	Estimated	Requested	đ		
	Code			Code			Status	Cost	Ву		
	J203585	Contains	Contains		Contains	Contains	Contains		Contains		
	<u>J203585-1</u>	<u>Test</u> <u>Opportunity</u> <u>Phase</u>	Mccormack State Office Building	<u>BSB01</u>	<u>\Locations\Sites\McCormack Building\551BSB9999</u> McCormack State Office Building	DEF - MAINT - STUDY	Identified	<u>\$10,000.00</u>	DLP		

#### Search by Title.

🛛 Deferred Maintenance Phase									
\$ Export 1 total found Apply Filters Clear Filters Show More Filters Show: 50 T									
CAMIS Phase	Name	Location Name	Site	Full Path	Phase Type	Phase Status	Estimated	Requeste	d
Code			Code				Cost	Ву	
Contains	chiller 💦	Contains		Contains	Contains	Contains		Contains	
<u>J107343-1</u>	REPLACE CHILLER	Mccormack State Office Building	<u>BSB01</u>	\Locations\Sites\McCormack Building\551BSB9999 McCormack State Office Building	DEF - MAINT - STUDY	<u>Completed</u>	<u>\$800,000.00</u>	CIRIGLIAN VINCENT	<u>10,</u>

#### Search by Status

Deferred Maintenance Phase										
Expert 14 total found Apply Filters Clear Filters Show More Filters Show 50 •										
	CAMIS Name Location Name Site Full Path Phase Phase Estimated								Requested	
	Phase			Code		Туре	Status	Cost	Ву	
	Code									
	Contains	Contains	Contains		Contains	Contains	identified		Contains	
	<u>J107347-1</u>	REPLACE MAIN ELECTRICAL SWITCH GEAR - EQ # E000007744	Mccormack State Office Building	<u>BSB01</u>	\Locations\Sites\McCormack Building\551BSB9999 McCormack State Office Building	<u>DEF -</u> <u>MAINT -</u> <u>STUDY</u>	Identified	<u>\$4,069,800.00</u>	<u>CIRIGLIANO,</u> <u>VINCENT</u>	
	<u>J107347-2</u>	REPLACE MAIN ELECTRICAL SWITCH GEAR - EQ # E000007745	Mccormack State Office Building	<u>BSB01</u>	\Locations\Sites\McCormack Building\551BSB9999 McCormack State Office Building	DEF - MAINT - D&C	Identified	<u>\$.00</u>	<u>CIRIGLIANO,</u> <u>VINCENT</u>	
	<u>J107348-1</u>	REPLACE LIGHTING CONTROLS	Mccormack State Office Building	<u>BSB01</u>	\Locations\Sites\McCormack Building\551BSB9999 McCormack State Office Building	DEF	<u>Identified</u>	<u>\$214,200.00</u>	<u>CIRIGLIANO,</u> <u>VINCENT</u>	
	<u>J110251-1</u>	FY-10 MCCORMACK GARAGE DRAIN SYSTEM REPALCEMENT	Mccormack State Office Building	<u>BSB01</u>	\Locations\Sites\McCormack Building\551BSB9999 McCormack State Office Building	<u>DEF -</u> <u>MAINT -</u> <u>STUDY</u>	<u>Identified</u>	<u>\$128,520.00</u>	VCIRIGLIAN	
	<u>J111405-1</u>	GARAGE DRAIN PIPING REPLACEMENT	Mccormack State Office Building	<u>BSB01</u>	\Locations\Sites\McCormack Building\551BSB9999 McCormack State Office Building	<u>DEF -</u> <u>MAINT -</u> <u>STUDY</u>	Identified	<u>\$120,000.00</u>	VCIRIGLIAN	
	<u>J111407-1</u>	INSTALLATION OF NEW CEILING AND WALL FINISHES	Mccormack State Office Building	<u>BSB01</u>	\Locations\Sites\McCormack Building\551BSB9999 McCormack State Office Building	<u>DEF -</u> <u>MAINT -</u> <u>STUDY</u>	<u>Identified</u>	<u>\$111,000.00</u>	VCIRIGLIAN	



#### **CREATING A PROJECT**

To create a Deferred Maintenance record, you must create a project. The project acts as a folder for the phases that will be added later. In the project folder you will enter the basic details such as the project description, location, priority, assets, etc.

After Projects are identified you can then move them into IN PROGRESS and COMPLETE as needed. You will REQUEST a project at the phase level in later steps.

Step	Action	Result •
1	Using the Quick Links you can create a new project.	The Project page for the specific phase will display:
L	Deferred Maintenance Quick Links     Create Deferred Maintenance Record      Another way from the list of     Deferred Maintenance Project     portlet, click the <u>Add</u> link	
2	Defensed Raitsmanne Project     Bo     Gaust Method Analytika Caucifus Ranchaulikan Sawe 10	Statal Road     Status     Description     Status     Opportunity Type     Estimated Cost     for data training
	and where it is located. The description gives you space to explain why the project is needed.	Description The boiler in the <u>McCormack</u> building is 25 years old and has failed several times in the past year. The parts are scarce and it is inefficient.

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<u>Step</u>	Action	<u>Result</u>	7
3	Enter the TYPE of project. This will always be "DEF-MAINT" at the project level.	Type DEF - MAINT	Formatted Table
4	Enter the REQUESTED BY field. This is the person who should be contacted if DCAMM has questions.	Requested By Robbie Brown	-
5	Enter the LOCATION information by selecting the FIND button.    Location  End   Ger  Muse Identified	Your location list will appear.         Export       2 total found       Apply Filters       Clear Filters         I       ID       Name         Contains       Contains         1000604       McCormack Building         1005069       McCormack State Office Building	
6	Click in the radial button to the left of the applicable Location  Contains		_
7	Click the OK link	The Location field will be populated with your selection  Location Find   Clear  Name McCormack Building Full Path \Locations\Sites\McCormack Building	_
8	In the Priority portlet, click the Find link Priority End I Gen:	A list of Priority options will display: Export 6 total found Apply Filters Clear Filt      Description      Priority 1      Priority 2      Priority 3	Formatted: Font color: Dark Gray
9	Click in the radial button to the left of the applicable Priority and then select OK.	Priority <u>Find   Clear</u> Name 1 - Critical failure is imminent and code violations     Rating     1	Formatted: Normal, Indent: Left: 0"



Ston	Action	Decul	4				
<u>Step</u>	Action	<u>Resul</u>					
10	Enter the Building System portlet. This helps DCAMM categorize the	A list	of Buildin	g System opt	ions will disp	olay:	+
	Project. Select FIND.  Building System Class End   Case	I         ID           ○         820           ○         830           ○         C10           ○         C20           ○         D10           ○         D20           ○         D30           ○         D40			Name B20 - EXTERIOR VERTIC/ B30 - EXTERIOR HORIZO C10 - INTERIOR CONSTR C20 - INTERIOR FINISHEE D10 - CONVEYING D20 - PLLIMBING D30 - HEATING, VENTIL/ D40 - FIRE PROTECTION	NTAL ENCLOSURES UCTION 5	TIONING (HVAC)
11	Click in the radial button to the left	The B	uilding Sy	stem field wi	ll be populat	ed.	-
	of the applicable Building System and select OK.	•	Building	System Class		E	<u>ind   Clear</u>
		★ Na	ame D30 - H (HVAC)	IEATING, VENTIL	ATION, AND AIR	CONDITION	ling
12	Enter any assets (If applicable). Select the FIND button to show a list	A list	of assets v	will appear			
	of assets for the location you	Ø <u>E</u>	Export 13 tota	I found <u>Apply Fi</u>	Iters <u>Clear Filters</u>		
	selected.	!	Asset Number	Asset Name	Asset ID	Specificat	ion Name
	Assets Find   Remove		Contains	boiler	Contains	Contains	
			E000007621	BOILER- McCormack Boiler #01	EQ-1000788	BOILER	
				BOILER- McCormack Boiler #02	EQ-1063427	BOILER	
13	Click in the radial button to the left	The A	ssets field	l will populat	ed		
	of the applicable Asset(s) and select OK.	•	Assets				
	D	ø	Export 2	total found Ap	oply Filters Clea	ar Filters	
	Strengt         Cannot           1         /13         Eagent         444 totel found         Acalutifian         Shew:         50         •           1         ID         Name		! Type			Image	ID
	1532 PM Rounds     153     1532 Building System Class     monoto and anoto and anoto and anoto an		Contains				Contai
	الم من اللي الي الي الي و الذي الله مالي و الله و المكانية (Charles and a second and a second and a second and		Building	Equipment			EQ-100
			Building	Equipment			EQ-106
14	To create and save the project, Click the ldentify button.			created and J		r.	
	uie button.	CAN	NIS NUM	iber J2298	500		_



	15	If a phase is being entered at this point, stay on the project form. If not, you can select "SAVE AND CLOSE" to leave the form.	
C	REAT	ING A PHASE	Formatted: Font: 14 pt. Bold

After creating a project, you will need to create a phase on the same form. You should create either one or two phases.

- 1. If the project does not need a study, then phase 1 will be for design and construction (D&C) of the project.
- 2. If a study is needed, then phase 1 will be the study and phase 2 will be the design and construction (D&C) of the project.

Step	Action	Result
1	In the project form, click the ADD button under the phase portlet.	A Blank Phase page will display:



2	Enter the NAME. The recommended way is to copy the project name and add either " - study" or "-D&C" to the end depending on what this particular phase refers to.	Name FY21 Boiler Replacement • McCormack Building • Study
Step	Action	Result
3	Enter the <b>DESCRIPTION</b> . This should be the details of the phase you are entering.	Description A study is needed for the replacement of the boiler because the surrounding systems connected to the boiler are also out of date
4	Enter the <b>TYPE</b> . This will be either "DEF- MAINT – D&C" or "DEF-MAINT – STUDY". Export 2 total found Name DEF - MAINT - D&C DEF - MAINT - STUDY	Type DEF - MAINT - STUDY
5	Enter the <b>COST</b> . IF you do not know the cost you can enter \$0 until you get an actual quote.	Estimated Cost \$50,000.00



6	Enter the <b>DM Attributes</b> . This is a list of questions that you will answer that DCAMM will use to help determine how to distribute funding. <b>See PAGE 17 for definitions</b> (If creating an emergency funding phase outside of the DM process this will not be needed)	Study in Earlier III Start Sta	Agency contribution Period Stars Star Files De Ottor Glass Competence Carnet 7 Signaldy Describe Address Realinery Describe Address Realinery Describe Address Realinery Address Realinery Describe Address Realinery De	
7	To complete the phase, select the <b>IDENTIFY</b> button on the top right to create and save the phase. This puts the phase into an IDENTIFIED project ready to be REQUESTED.	CAMIS Phase Code	e J229856-1	1

# REQUESTING A PHASE

When it comes time to request a funding from DCAMM you will want to move any identified phases you have into the requested status so DCAMM can evaluate them.

Step	Action	Result										
1	From the list of Phases in the Deferred Maintenance Phase portlet	The Phase page for the specific project will display:										
	find the phase you want to request.	Class fination (protein the final protein the fin										

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2	In the top right corner of the phase portlet, select REQUESTED to request the phase. Add To Bookmarks Print @ Help Requested Save & Close Cancel x	A warning will appear for you to confirm that you want to Request this Phase.
3	Click the <b>Continue</b> button to confirm. Click the <b>x</b> if you do not want to request the Phase.	The Phase will be moved to a Requested status. The Phase will stay as Identified.
4	The Phase form will close and the phase will be in REQUESTED status.	

# CANCELING A PHASE

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If a phase is no longer needed in the CAMIS system, you can CANCEL the phase. It will not remove the phase, but it will take it off your active lists.

If a phase was cancelled by accident contact a CAMIS COORDINATOR and we can reverse it.

Step	Action	Result									
1	From the list of Phases in the	The Phase page for the specific project will display:									
-	Deferred Maintenance Phase portlet										
	select the phase to CANCEL.										
	C Deferred Maintenance Project	CAVIS Harriber (2000) Name (1177 Nor replacement - Administration Exhibiting Description Description Description									
	Lagest 3 total found ApplyTilless Case/Tilless Show/How/Tilless										
	CANUS Number Name Location Name Full Path	Type [DEF - INALINT D Requested By [Att Ruck]     Requested Date 04/14/2016 Extimated Cost 5109,000.00									
	Containe Containe Containe Containe Containe	Location <u>End   Gass</u> Priority <u>End   Gass</u> Building System Class <u>End   Gass</u>									
	J200003 Test #2 as JBacki College     Jacking Consumity UccationedSites/Out	Name Administration     Name 1 - Crtiticit fulture is investeer and code violations     Name 80 - ECTERIOR HORIZONTAL ENCLOSURES     Name 10 - ECTERIOR HORIZONTAL ENCLOSURES     Name 10 - ECTERIOR HORIZONTAL ENCLOSURES     Name 10 - ECTERIOR HORIZONTAL ENCLOSURES									
	J200004 FY17 Roof replacement - Administration Hubble Administration Building	C Phase all									
	144 International International Internationa International International	Front Stad food     Gave 10									



2	In the top right corner of the phase portlet, select CANCEL to cancel the phase. Add To Bookmarks Print @ Help p Requested Save Save & Close Cancel x	A warning will appear for you to confirm that you want to cancel this Phase.
3	Click the <b>Continue</b> button to confirm. Click the <b>x</b> if you do not want to cacnel the Phase.	The Phase will be moved to a Canceled status. The Phase will not be Canceled.
4	The Phase form will close and the phase will be in cancelled status.	

## ATTACHING A DOCUMENT TO A RECORD

You can attach documents to almost any record in CAMIS. In the Deferred Maintenance process, please attach any files to the PHASE record. You should attach any records that would support your request for funding such as studies, photos or quotes. The file can be in almost any format (PDF, JPEG, .DOC, etc.)

Step	Action	Result
1	Click on the Notes & Documents tab	The page will open:
	DM Request Notes & Documents	



		Opportunity: J115424 📕 Add To Bookmarks 🚔 Print 🕐 Help							
		DM. Request Notes & Documents Save Save & Close More 💌 🗴							
		(Optional): Reference related documents or review comments to the record.							
		Comments Add   Remove							
		🕏 0 total found Show: 20 🔻							
		I Comment Created By Reference Date Comment							
		Related Documents     Find   Remove   Upload							
		🗳 0 total found Show: 10 🔻							
		Image: Document Name         Document Document Number         Document Status         Revision Revision         File Name							
		No data to display Save B Save & Close More A X							
2	In the Related Documents portlet,	The Object attachment Upload page will display:							
	click the UPLOAD link	Upload Multiple Files Single Upload							
		Number Type File Name Size							
	Find   Remove   Upload	Drop Files Here							
	Show: 10 <b>•</b>								
	on Date File Name								
		Select Multiple Files for Upload Clear Butmit							
3	You can drag and drop your files	Den 💌							
-	right into the "DROP FILES HERE"								
	Section.								
	Or To browse your computer files,								
	click "SELECT MULTIPLE FILES FOR								
	UPLOAD". Select the files you want	File Same							
	then click	Files of Type: All Files Open: Cancel							
4	Click the submit button at the	The document will be attached and displayed in the							
	bottom of the screen	Related Documents portlet:							

#### **CREATING A CASHFLOW PROJECTION (Quarterly Update)**

The new Cashflow projection tab will be replacing the old Project Status Report tab on the project form. We hope that this new design will help both DCAMM and user agencies track the progress of their Deferred Maintenance projects. The new design is based on a Gantt chart which is used frequently in project management. This document will help you navigate the new process.

**NOTE:** Please create your DM project in the usual way, with a project and phase(s). The only change is the Cashflow Projection tab is on at the Project level form, not the phase level.

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Once you fill out a Cashflow Projection for a project, you will be able to quickly find it in this report. When the next quarterly update comes around you can just use this report to see all your projects.

Horr	ne > Cash	flow Proj	ection Re	port (Quarte	erly Updat	e)								1	Oper	In New	Window	- † <b>j</b>	Add to I	lookmari	в 🖡	My B
																						g
elate	ed Reports	-Select-			De Projects - in Progress																	
0	Export	Apply Filters	Clear Filters	Show More Filter	1																	
	CAMIS J Number		DCAMM Project Number	Milestone	Milestone Status	Fiscal Year	Fund Amount	Total Expended to Date	Funding Source Type	Comments	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	Мау	Jun
	Contains	Contains	Contains	Contains	Contains	After	Equals	Equals	Contains													
	J111431	PARKING LOT REPAIRS AND STRIPING		<u>1 - Study and</u> Certification	In Progress	FY22	\$5,000.00	\$.00	Critical Repair Bond (CR)		_	_										
				2 - Design		<u>FY22</u>	5.00	5.00	Critical Repair Bond (CR)													
				<u>3 - Bid</u>		<u>FY22</u>	5.00	\$.00	Critical Repair Bond (CR)					_						_		
				4 - Construction		FY22	\$295,000.00	5.00	Critical Repair Bond (CR)													
							\$300,000.00	\$.00														

To create a Cashflow Projection, navigate to a project the same way you would edit a current entry. (changed because not everyone has dealt with entering project status reports) Find the project in the DEFERRED MAINTENANCE PROJECT portlet or from your 5 YEAR SPENDING PLAN REPORT and select it to open.



					Welcome, DM User	Log off About
					Company	Project 🔎
Home My Reports   Portfolio   Ma	inter	nance	Projects			
Home				Personalize	🗗 Open In New Window	My Bookmarks
Deferred Maintenance Quick Links		)eferred M	aintenance Phase			
Create Deferred Maintenance Record 🚳		eferred M	aintenance Project			
Deferred Maintenance Phases  Active Deferred Maintenance Phases						Add
DM Cashflow Report - Status Not Complete	0	Export	27 total found Apply Filters Clear Filters	Show More Filters		Show: 50 ~
		CAMIS Number	Name	Location Name	Full Path	
Notifications		Contains	Contains	Contains	Contains	
Notices		<u>J107343</u>	REPLACE CHILLER - MC 7TH FLOOR	Mccormack State Office Building	\Locations\Sites\McCormack B McCormack State Office Build	
		<u>J107347</u>	REPLACE MAIN ELECTRICAL SWITCH GEAR - MC LOWER MECH ROOM	Mccormack State Office Building	\Locations\Sites\McCormack B McCormack State Office Build	
		<u>J107348</u>	REPLACE LIGHTING CONTROLS - MC 109	Mccormack State Office Building	\Locations\Sites\McCormack B McCormack State Office Build	
		<u>J109203</u>	REPLACE BATHROOMS EXHAUST FANS - MC BUILDING	Mccormack State Office Building	\Locations\Sites\McCormack E McCormack State Office Build	

Once open you will see the Cashflow Projection tab where the Project Status Update tab used to be. Select the tab to open it.

Opportunity: 10036	49						Add To Boo	kmarks 📑 Print 🕐 He
DM Request Cas	hflow Projections	Notes & Documents					Save Save	& Close ] [ More ▼ ] [ x
(Attributestabinfo):								
General								
CAMIS Number			S	<b>tatus</b> Draft				
* Name	REPLACE CHIL	LER - MC 7TH FLOOR						
Description								
* Type Estimated Cost	DEF - MAINT \$800,000.00	8 م	★ Request Cumulative cost Proje	ed By CIRIGLIANO, ection \$.00	VINCENT		Date 10/18/2007 Cost \$800,000.00	
Location		Find   Clear	Priority		Find   Clear	Building	System Class	Find   Clear
Full Path Buildi	tions\Sites\McCo		<ul> <li>Name 1 - Critica violations</li> <li>Rating</li> </ul>	al failure is immine ; 1	nt and code	* Name		
Assets								Find   Remove
🗢   0 total found								Show: 10 🗸
! Туре		Image	ID	Name	Sp	pec Name	Spec Class	
No data to display								

When first opening the tab, it will be blank. We ask that you add 4 lines to this report. To add a line, you will select the ADD button on the right hand side of the screen.

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- 1. Study and Certification
- 2. Design
- 3. Bid
- 4. Construction

This is what a completed Cashflow projection should look like when complete.

a F	Project Financial Inform	nation																	
Tota	I Project Cost \$800,000.00						Ren	naining	to be P	rojecteo	\$.00								
	ashflow Projections																		
<b>9</b> g		ters <u>Clea</u>	Filters Show M																
	Milestone	Fiscal Year	Milestone Status	Fund Amount	Total Expended to Date	Open Obligation	Funding Source Type	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	Мау	Jun
	Contains	Equals	Contains	Equals	Equals	Equals	Contains												
	1 - Study and Certification	FY21	In Progress	\$20,000.00	<u>\$.00</u>	\$800,000.00	Critical Repair Bond (CR)					_	_	_	_	_	_		_
	2 - Design	FY21		\$50,000.00	<u>5.00</u>	<u>5.00</u>	Critical Repair Bond (CR)												_
	3 - Bid	FY21		5.00	<u>S.00</u>	5.00	Critical Repair Bond (CR)		_			_	_			_	_		
	4 - Construction	FY21		\$730,000.00	<u>\$.00</u>	<u>5.00</u>	Critical Repair Bond (CR)												_

To Create a Cashflow Projection select "ADD" on the right hand side of the screen.

Орро	Opportunity: 1003649 📲 Print 🕐 Help																					
DM	DM Request Cashflow Projections Notes & Documents Save & Close More													re▼ X								
•	Project Financial Information																					
Тс	Total Project Cost \$800,000.00 Remaining to be Projected \$800,000.00																					
•	Cashflow Projections												Add	Delete								
•	0 total four	nd																				
	Milestone		iscal ear	Milestone Status	Fund Amount	Total Expended to Date	Open Obligation	Funding Source Type	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	ISA Funding Amount	ISA Expira Date
No da	ta to display																					
					.00	.00																
4																						÷
Save	Save &	Close	More 4	▲ ×																		

After selecting ADD, the Financial Information and Milestones Timelines form will appear.



DM FY Update:					📑 Print 🕜 Help
General System Workflow Instance	Associations				Create X
(Required):					
Project Financial Informat	tion				
CAMIS J Number J1	107348	DCAMM Project Number			
Budget (TPC) \$	214,200.00	Cumulative Projections	\$.00	Remaining	g to be Projected \$214,200.00
ISA Funding Amount S	.00	ISA Expiration Date		25 🕄	
Open Obligation (Encumbered )	.00	Total Expended to Date	\$.00		
Project Milestone Timeline	es				
* Fiscal Year	🔹 🔹 Milesto	one	<ul> <li>Milestone State</li> </ul>	us	Y
Jul 🗆	_	Aug 🗆	Se	ep 🗌	Oct
Nov 🗆	1	Dec 🗌	Ja	an 🗌	Feb 🗌
Mar 🗆		Apr 🗆	M	ay 🗆	Jun 🗌
Cash Flow Projection per I	Milestone				
* Funding Source Type			🔹 Fund Amount 🖇		
Create X					

The first section is the Project Financial Information. We ask that you fill out the following.

- 1. ISA Funding Amount: Amount of money transferred in the ISA.
- 2. Open Obligation (Encumbered): Amount of money that has been encumbered.
- DCAMM Project Number: The Project number that was assigned in the ISA (Ex: UML2101)
- 4. ISA Expiration Date: Date that the ISA Expires (Usually 2 years unless extended)
- 5. Total Expended to Date: Amount paid to vendor in this step of process.

The next sections are the Project Milestone Timelines and Projection. This is where you will tell us how long this process should take and if this step is in in progress, completed or Not Applicable.

Project Milestone	Timelines		
* Fiscal Year	🔹 🖈 Milestone	Milestone Status	
Jul 🗆	Aug 🗌	Sep 🗌	Oct
Nov 🗌	Dec 🗌	Jan 🗌	Feb
Mar 🗌	Apr 🗌	May 🗆	Jun 🗆
Cash Flow Project	ion per Milestone		
* Funding Source Type	V	✤ Fund Amount \$	

1. Fiscal Year: The fiscal year that this step of the process will take place.



- 2. Milestone: The Milestone step that this data refers to.
- 3. Milestone Status: The status of the selected Milestone.
- 4. Months list: The months in which this step will take place.
- 5. Funding Source Type: What type of money is being spent (Bond, Match, SRP, etc)
- 6. Fund Amount: How much you expect to spend on this step.

Hon	me > DM C	ashflow R	eport												ď	open in t	lew Wind	dow	Add 🕅	to Bookn	narks
Relate S	ed Reports		Class Filters	Show More Filters	A Projecta - in Progresa																
ĺ	CAMIS J Number	Project Title	DCAMM Project Number	Milestone	Milestone Status	Fiscal Year	Fund Amount	Total Expended to Date	Funding Source Type	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Ju
	Contains	Contains	Contains	Contains	Contains	After	Equals	Equals	Contains												
	<u>J107343</u>	REPLACE CHILLER - MC.7TH FLOOR	BSB2104	<u>1 - Study and</u> Certification		FY21	\$20.000.00	\$20,000.00	Grant	_	_										
				2 - Design	In Progress	FY21	\$20,000.00	\$100,000.00	Critical Repair Bond (CR)						_						
				<u>3 - Bid</u>		FY21	<u>\$.00</u>	5.00	Agency Match												
				4 - Construction		FY21	\$745,000.00	<u>\$.00</u>	Critical Repair Bond (CR)												
							£705 000 00	6120.000.00													

After completing the four steps in your project you should end up with the report below.

When the time comes for the next update, you can use the Cashflow Report to see all your projects you have created Cashflow projections for. You can also follow this guide and add any other project that does not have a projection yet.

#### **EXPORTING DATA TO EXCEL**



There are many ways to export data from CAMIS query portlets or reports. Simply select the EXPORT button which is located above the headers of the query. If you use filters on the query first, the system will only export the filtered data.

	Deferred Maintenance Phase										
- 6	Export 25 total found Apply Filters Clear Filters Show More Filters										
	CAMIS Phase Cod	e Name									
	Contains	Contains									
	<u>J107343-1</u>	REPLACE CHILLER									
	<u>J107347-1</u>	REPLACE MAIN ELECTRICAL SWITCH GEAR - EQ # E000007744									
	<u>J107347-2</u>	REPLACE MAIN ELECTRICAL SWITCH GEAR - EQ # E000007745									

In Chrome browser it will show the downloaded file in the bottom left of your screen. In Explorer browser it will ask if you want to save or open the spreadsheet.

Below is how the data will appear in excel. Most formatting is lost so you will have to reformat text, column widths and heights.

4	А	В	с	D	E
1	Deferred Ma	intenance Phase by Location			
2		-			
3	04/17/2020 12:24:0	7			
4					
5	CAMIS Phase Code	Name	Location Name	Site Code	Full Path
6	J107343-1	REPLACE CHILLER	Mccormack State Office Building	BSB01	\Locations\Sites\McCormack Building\551BSB9999 M
7	J107347-1	REPLACE MAIN ELECTRICAL SWITCH GEAR - EQ # E000007744	Mccormack State Office Building	BSB01	\Locations\Sites\McCormack Building\551BSB9999 M
8	J107347-2	REPLACE MAIN ELECTRICAL SWITCH GEAR - EQ # E000007745	Mccormack State Office Building	BSB01	\Locations\Sites\McCormack Building\551BSB9999 M
9	J107348-1	REPLACE LIGHTING CONTROLS	Mccormack State Office Building	BSB01	\Locations\Sites\McCormack Building\551BSB9999 M
10	J109203-1	REPLACE BATHROOMS EXHAUST FANS - MC BUILDING	Mccormack State Office Building	BSB01	\Locations\Sites\McCormack Building\551BSB9999 M
11	J110200-1	CONDUCT ARC-FLASH SURVEY & PRODUCE ONE LINE DIAG.	Mccormack State Office Building	BSB01	\Locations\Sites\McCormack Building\551BSB9999 M

#### **BOOKMARKING REPORTS AND PROJECTS**



Using the bookmarking system in CAMIS can be very useful to have quick access to projects and reports you might need often.

Step	Action	Result
1	Open a Report, Project, Phase or many other records in CAMIS.	Openduety: 2000/2384.         At to Answer         Image: The open and the open a
2	Click on the ADD TO BOOKMARKS in the top right hand corner of the record.	The Bookmark window will open.
3	Edit the Bookmark Name to something relevant. This would be the project or phase name. Select ADD to save the bookmark Add To Bookmark Print Bookmark this record Bookmark this form Bookmark this form Bookmark this form Crosected folder: Way Favorites	The bookmark will save.
Step	Action	Result





### **DEFERRED MAINTENANCE ATTRIBUTES**



When requesting Deferred Maintenance money, DCAMM needs a way to rank each project that is submitted. These attributes are what DCAMM bases their funding determinations on. The more information you can provide, the better chance the project has of being funded.

Who Did the Study	Name of the house doctor or qualified agency employee that executed the study.
Cost Estimate Source	Vendor Name that provided the service quote to your agency.
Cost Estimate Date	Date the vendor/contractor/house doctor provided your agency a quote for services.
Current Phase of Project	What phase is the project in (Study/ D & C) Use the drop down to select an option.
Other Documents (Notes & Documents)	Checking to note that you have additional document to support this request in funding/
Life Safety Risk	Does the project involve a life safety risk? This would be a possible injury or death if this project is not completed.
Shutdown Threat	Does the project involve a shutdown threat? Is there a possibility if action is not taken on this request that the facility would be closed, if this project is not funded.
Describe Further Damage	Does this project involve anything further damage? If this system problem is not addressed now that over time that it will close further damage to other systems within the building.
Potential Penalty	Does this project involve a potential penalty? If this problem or potential failure will cause the agency to get fined by another government agency (i.e. DPH, DPS, DLS)
Addresses Resiliency	Does this project address resiliency? This would be if the identified problem was going to be increased by the rising climate or if the completion of the project would help reduce climate change.
Accessibility Issue	Does this project involve accessibility issues? Is there a need to address accessibility (i.e. walkways, entryways, elevators, drinking foundations) because of this request or because of certain triggers where must be addressed due this request.



Planned Start Date	When do you estimate that this project will start based upon the project schedule
Plan End Date	Per your planned project schedule when will this project be completed.
IG Class Completed	Name of the facility staff employee involved with this project that has completed the Inspector General's MCPPO class on procurement
Current FY Spending	If/when this project was funded, what is the total dollar amount you project will be expended in the current fiscal year.
Next FY Spending	The amount you project will be expended in the following fiscal year.
Only Applicable if dealing with equipment	
Age of Equipment or System (years)	Current age is based upon when the system was installed in your facility
Expected Remaining Life (years)	Based upon average life span of system and when it was installed how many years does this system have for its useful life.
Repair Cost Last 5 Years	How much has your agency spent on repairs and preventative maintenance for this system.
Replacement Parts Available	Can you still get parts to address the system's needed repairs?
PMs Completed (Yes/No)	Please provide detailed information what was your preventative maintenance plan
Is Equip/Sys Proprietary	Is the equipment Proprietary (can only be serviced by the original installation vendor)
Do you have a PM plan for new equip	Please provide a detail preventative maintenance (PM) plan for the new equipment

## CAMIS TEAM HELPDESK and CONTACTS



 The CAMIS helpdesk is monitored by the CAMIS team and is the best way to reach out to solve any problem with CAMIS.
 CamisHelpdesk.DCAM@MassMail.State.MA.US

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