

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 <u>Welcome, Joanne Sullivan</u>	The My Profile page will display
2	Populate the New Password field with your new password. Populate the	New password MUST contain a Cap
	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-Lesse Land Status (Land Class) A - Agricultural C - County Transfer D - Legislation To Dispose E - Easement F - Fire Tower G - Landfill H - Article 97 I - In Use							
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
MULSION OF CAPITAL ASSET VANAGEMENT 4	Company	Project	
Home My Reports Portfolio Maintenance	Projects		
Home	🚍 Personalize 📑 Öpen 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 Neurification 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.

Home My Reports Portfolio Deferred Maintenance Porjects Temms Maintenance Porjects Open In New Window Add to Bookmarks My Books Deferred Maintenance Porjects Personalize Crasto Deferred Maintenance Project Image: Maintenance Project Image: Maintenance Project Crasto Deferred Maintenance Record Enderred Maintenance Project Image: Maintenance Project Deferred Maintenance Projection Report (Quarterly Updata) Image: Maintenance Projection Image: Maintenance Projection Deferred Maintenance Report (Quarterly Updata) Image: Maintenance Projection Image: Maintenance Projection Image: Maintenance Projection Deferred Maintenance Report (Quarterly Updata) Image: Maintenance Projection Image: Maintenance Projection Image: Maintenance Projection DecAmb Deferred Maintenance Report (Quarterly Updata) Image: Maintenance Projection Image: Maintenance Projection Image: Maintenance Projection DCAMb Deferred Maintenance Relption Image: Maintenance Projection Image: Maintenance Projection Image: Maintenance Projection DCAMb Deferred Maintenance Relption Image: Maintenance Projection Image: Maintenance Projection Image: Maintenance Projection	M CANTAL ARET CANTAL ARET MANAGEMENT A MANAGEMENT A	Company Project 🔎
Deferred Maintenance (ind Maintenance Project Craste Deferred Maintenance (ind Links Deferred Maintenance (ind Links Deferred Maintenance Project	Home My Reports Portfolio Maintenance	cts
Image: Internance State Image: Internance State Image: Internance State Image: Internance State Image: Internance State Image: Internance State Image: Internance State Image: Internance State Image: Internance State Image: Internance State Image: Internance State Image: Internance State Image: Internance State Image: Internance State Image: Internance State Image: Internance State Image: Internance State Image: Internance State Image: Internance State Image: Internance State Image: Internance State Image: Internance State Image: Internance State Image: Internance State Image: Internance State Image: Internance State Image: Internance State Image: Internance State Image: Internance State Image: Internance State Image: Internance State Image: Internance State Image: Internance State Image: Internance State Image: Internance State Image: Internance State Image: Internance State Image: Internance State Image: Internance State Image: Internance State Image: Internance State Image: Internance State Image: Internance State Image: Internance State Image: Internance State Image: Internance State Image: Internance State Image: Internance State Image: Internal State Image: Internance State I	Deferred Maintenance	
Deferred Maintenance Quick Links Deferred Maintenance Project	Home > Maintenance > Deferred Maintenance	🚍 Personalize 📑 Open In New Window 📲 Add to Bookmarks 📕 My Bookmarks
Create Deferred Maintenance Record Stress Spending Flan (higher Ed) Cathlow Report Catrefy Update) Cathlow Report Catrefy Update) Cot Report Catrefy Update) Cot Report Catrefy Update) Cot Report Catrefy Update) Report Subjection Report Taining (non higher Ed) New Study Instructions	Deferred Maintenance Quick Links	Deferred Maintenance Project
Deferred Mutinemance Help CANN Deferred Maintenance Website Cost Projection Report Taining (non higher Ed) New Study Instructions	Create Deferred Maintenance Record 🗃 5 Year Spending Plan (Higher Ed) 👸 Cashflow Projection Report (Quarterly Update) 🗃 All Deferred Maintenance Projects 👼	Deferred Maintenance Phase
DCAMM Deferred Naintanance Website Cost Projection Report Taining (non righer Ed) New Study Instructions	Deferred Maintenance Help	
New Study Template Webfare © New Study Template Webfare © New Study Arsentation © New Request for Study Certification © New Verification of non Certifiable Projects ©	DCAMM Deferred Maintenance Website () Cost Projection Report Training (non higher Ed) () New Study Translate () New Study Translate Webhare () New Study Presentation () New Request for Study Certification () New Verification of non Certificable 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										
Se Export 1 total found Apply Filters Clear Filters Show More Filters								iow: 50	۳	
	CAMIS Phase	Name	Location Name	Site	Full Path	Phase Type	Phase	Estimated	Requested	
	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	<u>DEF - MAINT</u> - STUDY	Identified	<u>\$10,000.00</u>	DLP	

Search by Title.

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

Search by Status

	Deferred Maintenance Phase											
Ģ	Export 14	total found <u>Apply Filters</u> <u>Clear Filters</u>	Show More Filters					Sł	now: 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> MAINT - STUDY	Identified	<u>\$4,069,800.00</u>	CIRIGLIANO, VINCENT			
	<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	<u>Identified</u>	<u>\$.00</u>	CIRIGLIANO, VINCENT			
	<u>J107348-1</u>	REPLACE LIGHTING CONTROLS	Mccormack State Office Building	<u>BSB01</u>	\Locations\Sites\McCormack Building\551BSB9999 McCormack State Office Building	DEF - MAINT - STUDY	<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	DEF - MAINT - STUDY	<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	DEF - MAINT - STUDY	<u>Identified</u>	<u>\$120,000.00</u>	VCIRIGLIAN			
	<u>J111407-1</u>	INSTALLATION OF NEW CEILING AND WALL FINISHES	Mccormack State Office Building	BSB01	\Locations\Sites\McCormack Building\551BSB9999 McCormack State Office Building	DEF - MAINT - STUDY	<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:
	a new project. Deferred Maintenance Quick Links Create Deferred Maintenance Record S Another way from the list of Deferred Maintenance Project portlet, click the <u>Add</u> link Statement of the statement of th	

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<u>Step</u>	Action	<u>Result</u>]
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 Core View their deviation	Your location list will appear. Export 2 total found Apply Filters Clear Filters ! 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 I D Name Contains Contains Contains Contains DODGH McContack.Building McContack.Building		
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 Ger	A list of Priority options will display:	Formatted: Font color: Dark Gray
9	Click in the radial button to the left of the applicable Priority and then select OK.	Priority Find Clear Name 1 - Critical failure is imminent and code violations Rating 1	Formatted: Normal, Indent: Left: 0"



<u>Step</u>	Action	Resu	<u>lt</u>							
10	Enter the Building System portlet. This helps DCAMM categorize the	A list	A list of Building System options will display:							
Building System Class			1 ID Name 0 800 820 - DCTERIOR VERTICAL ENCLOSURES 0 800 600 - DCTERIOR VERTICAL ENCLOSURES 0 C10 C00 - INTERIOR CONTRUCTION 0 C20 C20 - NCTERIOR FINISHES 0 100 D10 - CONVENIS 0 200 D20 - LUMENIA 0 203 D20 - HUMENIA 0 208 D20 - HEATING, XMD AIR CONDITIONS 0 409 MAR ENDERTITION							
11	Click in the radial button to the left of the applicable Building System	ft The Building System field will be populated.								
	and select OK.	■ ★ N	Building S lame D30 - H (HVAC)	System Class EATING, VENTILA	ATION, AND AIR		<u>ind Clear</u> IING			
12	Enter any assets (If applicable). Select the FIND button to show a list	A list	of assets v Export 13 tota	will appear	ters Clear Filters					
	of assets for the location you selected.	!	Asset Number	Asset Name	Asset ID	Specificati	ion Name			
	Assets Find Bernove		<i>Contains</i> E000007621	boiler BOILER- McCormack Boiler #01	Contains EQ-1000788	Contains BOILER				
				BOILER- McCormack Boiler #02	EQ-1063427	BOILER				
13	Click in the radial button to the left of the applicable Asset(s) and select	The /	Assets field	l will populate	ed		_			
	OK.	¢	Assets	total found <u>Ap</u>	<u>ply Filters</u> <u>Clea</u>	ar Filters				
	Company C		! Type			Image	ID			
	1522 PR Rounds 34 Building System Class Call Print, Building Stem Class Call Print, Building Stem Class	Contains Building Equipment				EQ-10				
	To create and cave the project. Click	Droid	Building	Equipment	t will appear		EQ-10(
14	the Identify button.	CA	MIS Num	iber J2298	56					



CRFA	TING A PHASE		Formatted: Font: 14 pt Bold
	not, you can select "SAVE AND CLOSE" to leave the form.		
15	point, stay on the project form. If		
	If a whata is haing antowed at this		

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 DESCRIPTION . 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 TYPE . This will be either "DEF- MAINT – D&C" or "DEF-MAINT – STUDY".	Type DEF - MAINT - STUDY
	 DEF - MAINT - D&C DEF - MAINT - STUDY 	
5	Enter the COST . IF you do not know the cost you can enter \$0 until you get an actual quote.	Estimated Cost \$50,000.00



funding. See PAGE 17 for definitions (If creating an emergency funding phase outside of the DM process this will not be needed) If the phase, select the IDENTIFY button on the top right to create and save the phase. 7 To complete the phase, select the IDENTIFY 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 J229856-1	6	Enter the DM Attributes . This is a list of questions that you will answer that DCAMM will use to help determine how to distribute	Study Mached Web Dot Mo Study Cott Stands Cott Study Decotts Life Starty Mail Decotts Life Study Extended E	Agency Contribution Planned Start Date Plan End Date I O Class Completed Current PY Spending I Next PY Spending Entential Penalty Describe Potential Penalty	00 20 80 00
needed) CAMIS Phase Code J229856-1 7 To complete the phase, select the IDENTIFY button on the top right to create and save the phase. CAMIS Phase Code J229856-1 This puts the phase into an IDENTIFIED project ready to be REQUESTED. CAMIS Phase Code J229856-1		See PAGE 17 for definitions (If creating an emergency funding phase outside of the DM process this will not be	Shukaren Tureat Descrite Shukaren Tureat Descrite Shukaren Tureat Perfor Desce Perfora Tunear Descrite System (norm 0) Descrite Status (St. Serv. 0) Read-Cost. Last Status Descrite St. Last Status Descrite St. Last Status	Addresses Resiliency Describe Addresses Resiliency Accessibility issue Describe Accessibility issue Pilos Completed (VerNh) Is Colphysp Proprietary Do you have a Pilo plan for new equip	
	7	needed) To complete the phase, select the IDENTIFY 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 Cod	e J229856-	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:								
	Tind the phase you want to request.	Class fination States (5x1) • States (5x1) • States (5x1) • News (5x1) • States (5x1) • States (5x1) • States (5x1) • News (5x1) • States (5x1) • News (5x1) • States (5x1) • States (5x1) • States (5x1)								

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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 Continue button to confirm. Click the x 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	CAMPS Number (2000) Status Druft Amma (r.17) Starf registerment - Advisition Building Description Description								
	Laund 3 total found Analyzilless Generilless Steer-Reserilless									
	CANIS Number Name Location Name Full Path	Type [DEF - INALINT D Requested By [Att Ruck] Requested Date 04/14/2016 Extimated Cost 5109,000.00								
	Container	Location <u>End Gass</u> Priority <u>End Gass</u> Building System Class <u>End Gass</u>								
	J200001 Test #2 as JBacki College Junxigamond Community Uccations/Sites/Out	Knone Administration Knone Administration Knone IIII Control Administration Knone IIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIII								
	J200004 FY17 Roof replacement - Administration Hubble Administration Building	C Phase all								
	144 International International Internationa International International	Found Table found Boar 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 Continue button to confirm. Click the x 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 V x								
		(Optional): Reference related documents or review comments to the record.								
		Comments Add Rem								
		© 0 total found Show: 20 ▼								
		I Comment Created By Date Comment								
		Related Documents Find Remove Upload								
		🖗 0 total found Show: 10 🔻								
		I Document Document Document Document Revision File Date Name								
		No data to display Save & Close More 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 <u>Remove</u> <u>Upload</u>	Drop Files Here								
	Show: 10 T									
	on Date File Name									
		Select Multiple Files for Upsad Cear Butmit								
3	You can drag and drop your files	Cpen								
	right into the "DROP FILES HERE"									
	Section.									
	Or To browse your computer files									
	click "SELECT MULTIPLE FILES FOR									
	UPLOAD". Select the files you want	To have								
	then click	Files of Type: All Files								
		Upen Canter								
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.

н	kome > Cashflow Projection Report (Quarterly Update) 🗖 Open In New Window 📲 Add to Bookmarks 📕 My Boo																						
																							🕒 Pop
Rel	sted	Reports -	Select-			Des Projects - In Progress																	
4		Export /	Apply Filters	Clear Filters	Show More Filter	\$																	
		CAMIS J Number	Project Title	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													
C) 4	111431	PARKING LOT REPAIRS AND STRIPING		<u>1 - Study and</u> Certification	in Progress	FY22	\$5,000.00	\$.00	Critical Repair Bond (CR)		_	_										
c)				2 - Design		<u>FY22</u>	5.00	<u>\$.00</u>	Critical Repair Bond (CR)													
C)				<u>3 - Bid</u>		FY22	5.00	<u>\$.00</u>	Critical Repair Bond (CR)			_		_				_	_		_	
C)				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	ainter	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 🗃						Add
DM Cashflow Report - Status Not Complete R	6	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	Building\551BSB9999 ding
		<u>J107347</u>	REPLACE MAIN ELECTRICAL SWITCH GEAR - MC LOWER MECH ROOM	Mccormack State Office Building	\Locations\Sites\McCormack B McCormack State Office Build	Building\551BSB9999 ting
		<u>J107348</u>	REPLACE LIGHTING CONTROLS - MC 109	Mccormack State Office Building	\Locations\Sites\McCormack B McCormack State Office Build	Building\551BSB9999 ling
		<u>J109203</u>	REPLACE BATHROOMS EXHAUST FANS - MC BUILDING	Mccormack State Office Building	\Locations\Sites\McCormack B McCormack State Office Build	Building\551BSB9999 ting

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	J107343		S	tatus 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	Requested I Remaining	Date 10/18/2007 Cost \$800,000.00	
Location		Find Clear	Priority		Find Clear	Building	System Class	Find Clear
★ <u>Name</u> McCor \Locat <u>Full Path</u> Buildi Office	mack State Off tions\Sites\McCo ng\551BSB9999 Building	ice Building ormack McCormack State	 Name 1 - Critica violations Rating 	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.

pportunity: 1003649 add Th																		
DW Request Cashflow Projections	Notes &	Documents															S	ave S
Project Financial Information																		
Total Project Cost \$800,000.00 Remaining to be Projected \$.00																		
Cashflow Projections																		
Export 4 total found Apply Fil	ters Clear	Filters Show Ma	re Filters															
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												
I - Study and Certification	FY21	In Progress	<u>\$20,000.00</u>	<u>\$.00</u>	\$800,000.00	Critical Repair Bond (CR)						_	_		_	_		
🗆 🌆 <u>2 - Design</u>	FY21		\$50,000.00	<u>5.00</u>	<u>5.00</u>	Critical Repair Bond (CR)												
🗆 🌆 <u>3 - Bid</u>	FY21		5.00	<u>\$.00</u>	5.00	Critical Repair Bond (CR)					_	_	_		_	_	_	_
4 - Construction	FY21		\$ <u>730,000.00</u>	<u>\$.00</u>	<u>\$.00</u>	Critical Repair Bond (CR)												
			\$800,000.00	\$.00														
<																		
Save 🛛 Save & Close 🛛 More 🔺 🔹	•																	

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

Opportunity: 1003649 🙀 Add To Bookmarks 🚔 Print 🕜 Help																					
DM	DM Request Cashflow Projections Notes & Documents Save & Close More V (x)																				
•	Project Financial Information																				
Total Project Cost \$800,000.00 Remaining to be Projected \$800,000.00																					
•	Cashflow Projections Add Delete												Delete								
•	0 total foun	d																			
	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	May	Jun	ISA Funding Amount	ISA Expira Date
No da	ta to display																				
				.00	.00																
4																					÷
Save	Save &	Close Mo	re 🔺 🛛 🗙																		

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	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	 Milestone State 	us	T
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 Projecti	on per Milestone		
* Funding Source Type		★ 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.

Ho	me > DM	Cashflow R	leport												d o	pen in N	lew Win	dow	Add 🖌	to Bookn	narks
Rela	ed Reports	-Select-			M Projecta - in Progress																
4	Export	Apply Filters	Clear Filters	Show More Filters																	
	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	Jun
	Contains	Contains	Contains	Contains	Contains	After	Equals	Equais	Contains												
	<u>J107343</u>	REPLACE CHILLER - MC 7TH FLOOR	<u>BSB2104</u>	<u>1 - Study and</u> Certification	Completed	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>	<u>\$.00</u>	Agency Match												
				4 - Construction		<u>FY21</u>	\$745,000.00	<u>5.00</u>	Critical Repair Bond (CR)												

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								
9	Export 2	Export 25 total found Apply Filters Clear Filters Show More Filters							
	CAMIS Ph	ase Code	Name						
	Contains		Contains						
	<u>J107343-1</u>	L	REPLACE CHILLER						
	<u>J107347-1</u>	<u>L</u>	REPLACE MAIN ELECTRICAL SWITCH GEAR - EQ # E000007744						
	<u>J107347-2</u>	2	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.

1	А	в	с	D	E
1	Deferred Ma	intenance Phase by Location			
2		•			
3	04/17/2020 12:24:07				
4	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 Castion Castion	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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