

Standard Operating Procedure

01 - Converting Service Request to Project



A. Purpose

This process documents the steps taken to facilitate the conversion of a Service Request to a Project. The initial request is created through the Service Request form and converted to a Project Request.

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 Service Requests.

➤ **Maintenance Manager/Project Coordinator**

The Maintenance Manager/Project Coordinator is responsible for determining the scope of work, creating and scheduling phase(s) for the Project, and managing the Project.

➤ **Maintenance Manager**

The Maintenance Manager is responsible for converting Service Requests to Project Requests, managing the work initiated through the Project Phases, and canceling Project Requests.

C. Process Overview

Customer Service/Work Control

Step 1: Request is submitted to Work Control Center.

Step 2: Service Request is entered.

Maintenance Manager

Step 3: A determination is made whether the work is a Project.

Step 5: A determination is made whether the project will be performed.

Step 7: Project Request is cancelled.

Maintenance Manager/Project Coordinator

Standard Operating Procedure

01 - Converting Service Request to Project



Step 4: The scope of the Project is determined by number of shops needed.

Step 6: Project Phases are created based on shop necessity.

Step 8: Report on Project Request history is printed.

D. Process Steps

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

Customer Service/Work Control

Step 1: Request is submitted to Work Control Center

Step 2: Service Request is entered

- Access Service Request Form by clicking on the form in the Navigator. (*SERVICE REQUEST/SERVICE REQUESTS*)
 - ❑ [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 Alternate Requestor Name (*Use the List of Values, CTRL/L if needed*)
 - Ex: Last Name, First Name
- ❑ Enter Telephone number
 - Ex: XXX-XXXX ext.
- ❑ Request Date automatically filled in today's date, update if needed

Location Information

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

Standard Operating Procedure

01 - Converting Service Request to Project



- ❑ 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
- ❑ Enter Priority – Facility In House Project (*Use the List of Values, CTRL/L if needed*)
 - 21 FAC Emerg (30 days)
 - 22 FAC High (90 days)
 - 23 FAC Med (180 days)
 - 24 FAC Low (365 days)
- ❑ Enter Priority – DCAM Capital Project (*Use the List of Values, CTRL/L if needed*)
 - 41 DCAM Emerg (90 days)
 - 42 DCAM High (365 days)
 - 43 DCAM Med (730 days)
 - 44 DCAM Low (1460 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.

- ❑ Enter Equipment ID if the service is for an inventoried equipment (*Use the List of Values, CTRL/L if needed*)

Billing Information

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

Standard Operating Procedure

01 - Converting Service Request to Project



- ❑ Select Billing Method
 - 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 needed)
- ❑ 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 the X in the upper right hand corner.
- Close the Project Request Form by clicking on the X in the upper right hand corner.

Maintenance Manager

Step 3: A determination is made whether the work is a Project.

- Access Service Request Workbench Form 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)

Standard Operating Procedure

01 - Converting Service Request to Project



- ❑ 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 the Service Request to view and click on the [VIEW] button

Will the work be a Project?

- ❑ [NO] Refer to SOP # 02 Converting Service Request to Work Order
- ❑ [YES] Converting Service Request to Project
- ❑ Close the Service Request form by clicking on the X in upper right hand corner.
- ❑ Select the Service Request to convert and click on the [CONVERT TO PROJ] button
- ❑ CAMIS will automatically assign a Project Request number.

Maintenance Manager/Project Coordinator

Step 4: The scope of the Project is determined by number of shops needed.

- Access Project Workbench Form by clicking on the form in the Navigator. (PROJECT/PROJECT 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: *Project Manager, 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
 - ❑ Check to see the Save Changes checkbox is checked
 - ❑ Select the Project Request to view and click on the [VIEW PLAN] button

Standard Operating Procedure

01 - Converting Service Request to Project



Project Information

- Enter Assigned To (*Use the List of Values, CTRL/L if needed*)
- Enter Project Manager (*Use the List of Values, CTRL/L if needed*)
- Enter Requested Start Date (*Customer requested start date*)
- Enter Requested Due Date (*Customer requested end date*)
- Close the Project Planning form by clicking on the X in the upper right hand corner.
- Close the Project Workbench by clicking on the X in the upper right hand corner.

Maintenance Manager

Step 5: A determination is made whether the project will be performed.

- Access Project Workbench Form by clicking on the form in the Navigator. (*PROJECT/PROJECT 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: *Project Manager, 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
 - Check to see the Save Changes checkbox is checked
 - Select the Project Request to view and click on the [VIEW PLAN] button

Will the work be performed?

- [YES] Contact Project Coordinator to proceed with phases
- [NO] Cancel Project Request (Refer to Step 7)
- Close the Project Workbench

Standard Operating Procedure

01 - Converting Service Request to Project



Maintenance Manager/Project Coordinator

Step 6: Project Phases are created based on shop necessity.

- Access Project Workbench Form by clicking on the form in the Navigator. (*PROJECT/PROJECT WORKBENCH*)
 - ❑ Find the Project Request to view using the folder previously created
 - ❑ Select the Project Request to view and click on the [VIEW PLAN] button
- Access Phases Form by clicking on the [PHASES] button from the Project Planning Form.
- Click on [ADD] to enter a new phase
 - ❑ Enter the description of work. (*64 characters can be entered*)

General Information

- ❑ Enter Status (*Use the List of Values, CTRL/L if needed*)
 - APPROVED (Customer has approved estimate for phase)
 - DEFERRED (Postponed due to funding or resources)
 - ESTIMATING (Project phase is being estimated)
 - CANCELED (Customer has rejected estimate for phase)
 - SCHEDULED (Work Order will automatically be created by CAMIS)
- ❑ Enter Start Date
- ❑ Enter Duration (*1 day=1d, 2 weeks=2w, 3 months=3m, 4 years=4y*)
 - Due Date is automatically calculated based on Start Date and Duration
- ❑ Enter Method
- ❑ Enter Requested Start Date (*Customer Requested Start Date*)
- ❑ Enter Requested End Date (*Customer Requested End Date*)

Primary Labor Information

- ❑ Enter Crew (*Use the List of Values, CTRL/L if needed*)
- ❑ Enter Craft (*Use the List of Values, CTRL/L if needed*) (*Optional*)
- ❑ Enter Crew size (*Optional*)
- ❑ Enter Estimated hours

(Primary) Task List Information

- ❑ Click in the Task List to enter necessary steps.

Secondary Labor Information, if applicable

- Access the Secondary Labor Window by clicking on the [LABOR] button from the Phase Form

Standard Operating Procedure

01 - Converting Service Request to Project



- ❑ Enter Crew (*Use the List of Values, CTRL/L if needed*)
- ❑ Enter Crew size
- ❑ Enter Craft (*Use the List of Values, CTRL/L if needed*)
- ❑ Enter Estimated hours
- ❑ Enter (Secondary) Task List
- Close the Secondary Labor Window by clicking on the X in the upper right hand corner

Estimate Information

- Access the Estimate Window by clicking on the [ESTIMATE] button from the Phase Form
 - ❑ Enter Estimated Material charge
 - ❑ Enter Estimated PO charge
 - ❑ Enter Estimated Contingency charge
- Close the Estimate Window by clicking on the [OK] button
- Close the Phase Form by clicking on the [OK] button

Repeat Step 6 to Add additional phases to the Project at any time during an active project

- Close the Phase Summary Form by clicking on the X in the upper right hand corner
- Close the Project Plan Form by clicking on the X in the upper right hand corner

Maintenance Manager

Step 7: Project Request is canceled.

- Access Project Request Form by clicking on the form in the Navigator. (*PROJECT/PROJECT REQUESTS*)
 - ❑ Enter Query mode (*F11*)
 - ❑ Enter Project Request Number
 - ❑ Execute Query (*CTRL/F11*)
 - ❑ Change Status = CANCELED
 - ❑ Save the Project Request (*CTRL/U*)
- Close the Project Request Form by clicking on the X in the upper right hand corner

Standard Operating Procedure

01 - Converting Service Request to Project



Maintenance Manager/Project Coordinator

Step 8: Report on Project Request history is printed.

- Access the Project Workbench Form by clicking on the form in the Navigator.
(PROJECT/PROJECT WORKBENCH)
 - ❑ 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 Project Workbench Form by clicking on the X in upper right hand corner

E. Document Control

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

Standard Operating Procedure

01 - Converting Service Request to Project



F. Process Flow

