

Standard Operating Procedure

05 - Managing Work Orders



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.

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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

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- ❑ 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

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

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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

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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

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- ❑ 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

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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.

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F. Process Flow

