

Creating a Capital Project Work Order

PROCEDURE

Capital Project Form – General Tab – Header Section

Capital Project

CP Number CP130052 SER: INSTALLATION OF LARGE WAREHOUSE CEILING FAN IN SER 222

Parent CP

General Details Versions Approvals Schedule Accounts Budget Work Orders POs Locations

General Information

Status CANCELED Assigned To 11301 Fees...

Type FS_PMCS_RENO Project Manager 00382 Audit Trail...

Open Date TUE JUL 12, 2005 Funding Amount Leases...

Dates...

Location

Site UTM

Building 0561

Floor

Room

Requestor Information

Requestor MUHLSTEIN_DENNIS

Telephone

Description

PLEASE DO A CONSTRUCTABILITY REVIEW FOR INSTALLATION OF THE LARGE WAREHOUSE CEILING FAN. THESE ARE THE REQUIREMENTS:

THE FAN IS A CEILING MOUNTED FAN FOR AIR MOVEMENT FROM MACROAIR TECHNOLOGIES AND HAS A 10' BLADE. THE ENTIRE UNIT WEIGHS 195 LBS. POWER REQUIREMENTS ARE 230 VOLTS SINGLE PHASE OR THREE PHASE USING

1. Open the FCP Capital Project form and query for the appropriate CP.
 - a. **CP Number** – If not already selected, put cursor in CP Number field and click on the 'Enter Query' button (F11).
 - b. Fill in the appropriate CP number and click on the 'Execute Query' button (Ctrl+F11).
2. Click on the Work Order tab.
 - a. Make sure that there is not a Work Order already created for this purpose.

Creating a Capital Project Work Order

Capital Project Form – Work Orders Tab

WO Number	Description	Status
36261020	DESIGN NON-CHARGE PLANNING/ESTIMATING	CLOSED

b. Click on the **Add...** button to open the Capital Project Work Order Form.

Creating a Capital Project Work Order

Capital Project Work Order Form – General Tab

Capital Project Work Order

General | Detail | Budget | Schedule | Routing | Requisitions | POs

Req Number: **ASSIGN**

CP Number: CP130052

WO Number:

Deficiency Project:

General Information

Status: []

Type: []

Priority: []

Method: []

Crew: []

Assigned To: [] Print Ticket

Start Date: []

Due Date: []

Complete Date: []

Site: UTM

Building: 0561

Floor: []

Room: []

Billing...
Print...
Dates...
Costs...
Request...
Audit...

Requirements

[]

- c. **CPWO Description** – Fill in the Standard CPWO Description.
 - i) The Standard CPWO Description format is: 'Budget Code' – 'Building Abbreviation': 'Description of work' **Example:** 1.1 MAI: Printing and Delivery Charges or 2.1 **MAI:** 06CMR002.1-FLYNN-GMP'S-4TH FLOOR AIR HANDLING UNIT

Creating a Capital Project Work Order

Capital Project Work Order Form – General Tab –General Information

Capital Project Work Order

General | Detail | Budget | Schedule | Routing | Requisitions | POs

Req Number: **ASSIGN**

CP Number: CP130052

WO Number:

Deficiency Project:

General Information

Status: []

Type: []

Priority: []

Method: []

Crew: []

Assigned To: [] Print Ticket

Start Date: []

Due Date: []

Complete Date: []

Site: UTM []

Building: 0561 []

Floor: []

Room: []

Billing...
Print...
Dates...
Costs...
Request...
Audit...

Requirements

- ii) **Status** – (required) Indicates the Status of the Work Order. Make the appropriate selection using the Status button, or by typing directly in the field.
 - iii) **Type** – (required) Indicates the type of work to be performed. Make the appropriate selection using the Type button, or by typing directly in the field.
 - iv) **Priority** – (required) Priority given to the work being done. Make the appropriate selection using the Priority button, or by typing directly in the field.
 - v) **Method** – (required) Indicates the delivery method. Make the appropriate selection using the Method button. If not known, use TBD.
 - vi) **Crew** - (required) Enter crew number of crew to perform work/manage work order. Make the appropriate selection using the Crew button, or by typing directly in the field.
 - vii) **Assigned To** - Enter employee number of employee to manage work order, if applicable. Make the appropriate selection using the Assigned To button.
 - viii) **Start Date** – Not used.
 - ix) **Due Date** – Not used.
 - x) **Site** – (required) Enter site abbreviation for location where work will take place. Make the appropriate selection using the LOV button.
 - xi) **Building** – Enter building number for location where work will take place, if applicable. Make the appropriate selection using the LOV button.
 - xii) **Floor** - Enter floor number for location where work will take place, if applicable. Make the appropriate selection using the LOV button.
 - xiii) **Room** - Enter room number for location where work will take place, if applicable. Make the appropriate selection using the LOV button.
- d. Click on the Budget Tab.

Creating a Capital Project Work Order

Capital Project Work Order Form – Budget Tab – Header Section

Capital Project Work Order

General Detail Budget Schedule Routing Requisitions POs

Budget Code 1.1 (DESIGN)

	Estimate	Actual	Balance		
Hours				Current Balance	.00
Rate	50.00			Less Approved CR	.00
Labor	.00	.00	.00	Less Approved Reqs	.00
Material		.00	.00	Less Committed POs	.00
Purchases		.00	.00	Total Allocated	.00
Contingency		.00	.00	Less Active CRs	.00
Equipment			.00	Less Requested Reqs	.00
Total	.00	.00	.00	Remaining	.00

Buttons: Billing Refresh Costs

- i) **Budget Code** – Choose the appropriate Budget Code.

Creating a Capital Project Work Order

Capital Project Work Order Form – Budget Tab – Buttons

	Estimate	Actual	Balance		
Hours				Current Balance	.00
Rate	50.00			Less Approved CR	.00
Labor	.00	.00	.00	Less Approved Reqs	.00
Material		.00	.00	Less Committed POs	.00
Purchases		.00	.00	Total Allocated	.00
Contingency		.00	.00	Less Active CRs	.00
Equipment			.00	Less Requested Reqs	.00
Total	.00	.00	.00	Remaining	.00

ii) Click on the Billing button.

Capital Project Work Order Form – Budget Tab – Billing

Account	Percent	Attribute1	Attribute2
3675603251-1803	100.00		

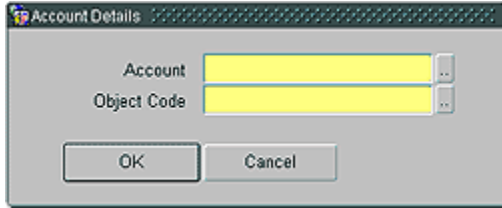
iii) **Billing Type** – Select Appropriate Billing Type.

iv) **Account Number and Object Code** – Check to make sure that the appropriate Account Number and Object Code is on the Work Order.

(i) **Account Details** – If no information is in the Account Details, click on the Account button to enter the appropriate Account number and Object Code.

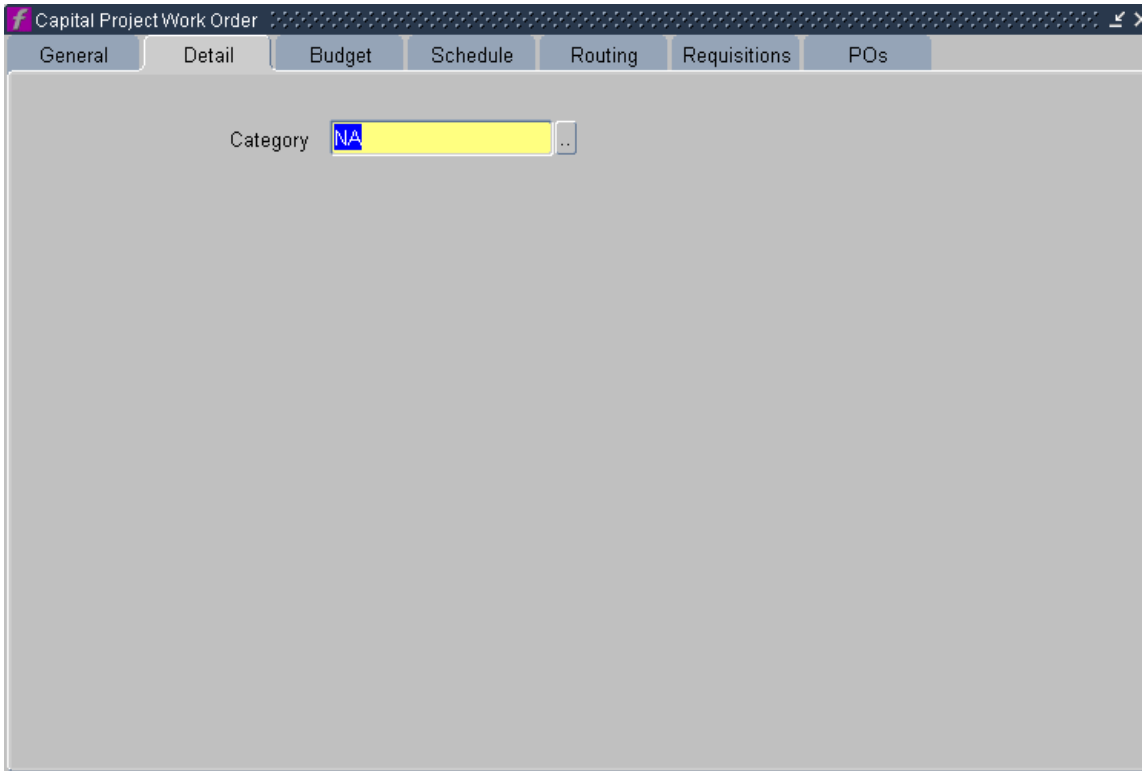
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Capital Project Work Order Form – Budget Tab – Billing – Account Details



- (j) **Account** – Click on the List of Values button next to the Account field and choose the appropriate account number.
- (k) **Object Code** – Click on the List of Values button next to the Object Code field and choose the appropriate object code.
- (l) Click OK.
- v) Click OK until you are back at the CP Work Order form.
- vi) Click on the Details Tab.

Capital Project Work Order Form – Details Tab



- (1) **Category** – Shows the detail of the work being done.
 - (a) Select the appropriate category using the LOV button. This selection correlates with the CPWO Type.
- (2) Close the CPWO Form.
- vii) Close the Capital Project form.