facilityworqs

PROCEDURE

Capital Project Form – General Tab – Header Section

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.

Capital Project Form – Work Orders Tab

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

Capital Project Work Order Form – General Tab

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

Capital Project Work Order Form – General Tab –General Information

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.

Capital Project Work Order Form – Budget Tab – Header Section

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

Capital Project Work Order Form – Budget Tab – Buttons

  ii) Click on the Billing button.

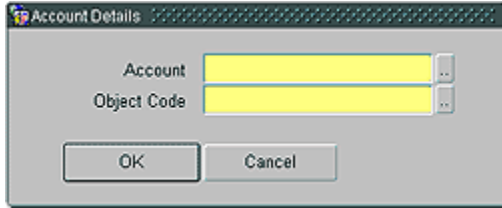**Capital Project Work Order Form – Budget Tab – Billing**

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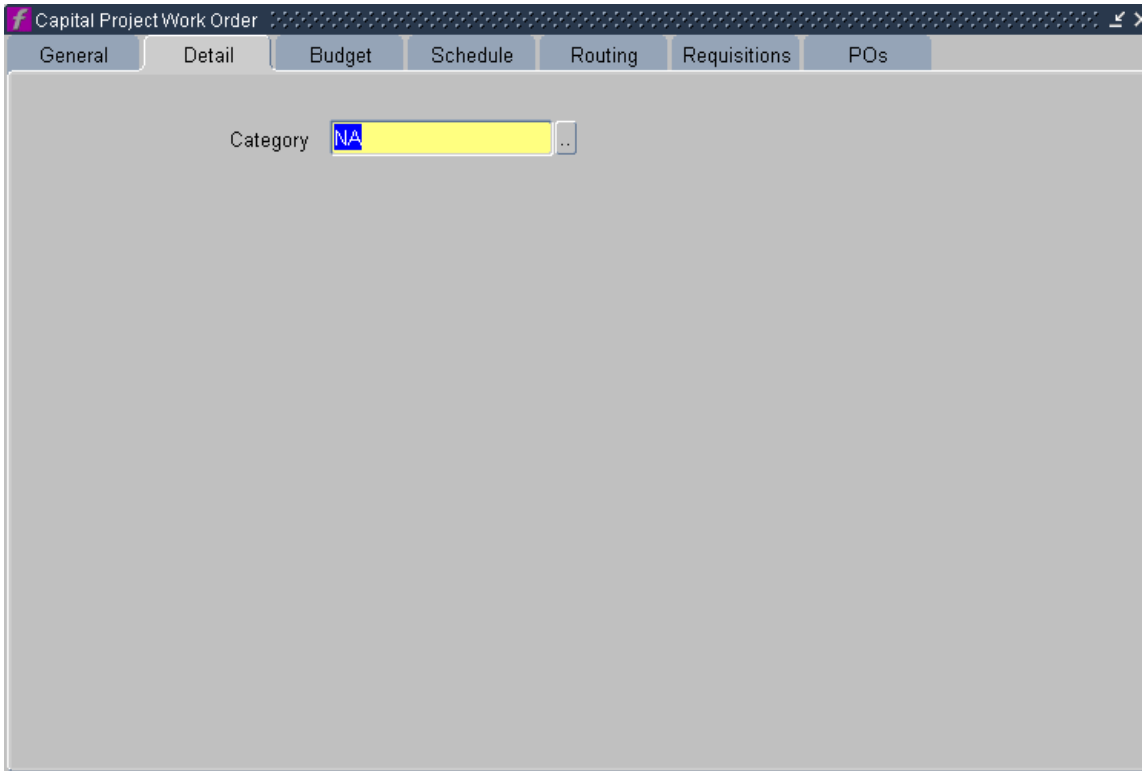
Capital Project Work Order Form – Budget Tab – Billing – Account Details

(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.