

Creating a Capital Project

PROCEDURE

1. Open the FCP Capital Project Form.

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

2. **CP Number** – Query for the appropriate CP Number.
 - a. Click on the Enter query button (F11), fill in the appropriate CP Number, and click on the Execute Query button (Ctrl+F11).

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Capital Project Form – General Tab – General Information Section

Capital Project

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General Information

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- b. **Status** – Select the appropriate Status.
 - i) Click on dropdown list or type directly in the field.
- c. **Type** – Select appropriate Type for Capital Project.
 - i) Click on dropdown list or type directly in the field.
- d. Click on the Save button or press Ctrl+S on your keyboard.

There will be a pop-up window that displays the message “You have changed the CP type which will delete the current funding, schedule, budgets and all revisions.”

 - i) Click on Save. Note: Since you are just creating the CP, there is nothing to lose as described in above message.* If you are asked to change the Type when there is already information in the above tabs, then you will need to do a screen print of Details, Schedule, Accounts, Accounts Details, and Versions tab prior to changing the Type so that you can re-enter this information.
- e. **Assigned To** – Enter in the Assigned To field the FAMIS 5 digit ID# of the appropriate employee.
 - i) If unknown, click on the Assigned To LOV field and query “%last name%”, highlight correct name. Click OK or double click on name.
- f. **Project Manager** – If appropriate, enter in the Project Manager LOV field the FAMIS 5 digit ID# of the applicable employee.
 - i) If unknown, click on the Assigned To LOV field and query “%last name%”, highlight correct name. Click OK or double click on name.

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Capital Project Form – General Tab – Location 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...
Requestor Information: Requestor: MUHLSTEIN_DENNIS Dates...
Telephone: ..

Location

Site: UTM ..
Building: 0561 ..
Floor: ..
Room: ..

Description

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- g. **Floor** – Enter the Floor if appropriate.
- h. **Room** – Enter the Room if appropriate.
- i. **Requestor** – Enter Requestor if appropriate.

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Capital Project Form – General Tab – Description Section

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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

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- j. **Description** – If there is no information in the Description, please type in 'Building Abbreviation': 'Description of Work'.
 - i) Ex. MAI: Renovate President's Office
- k. Click on the Details tab. (The Details tab can change based on CP Type.)

Creating a Capital Project

Capital Project Form – Details Tab

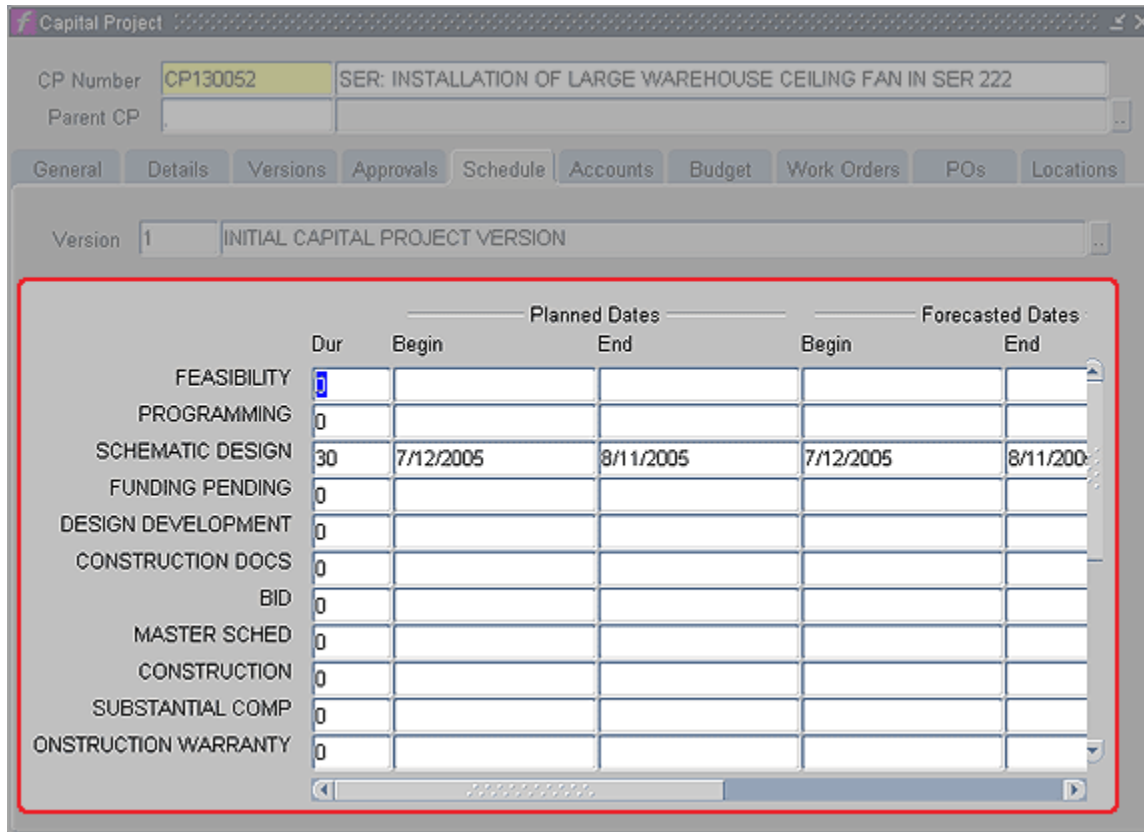
CP Number	CP199453	SV1: REPLACE PAINT STOARGE ROOM W/ PAINT MIXING ROOM & HOOD SYS	
Parent CP			
General	Details	Versions	
Approvals	Schedule	Accounts	
Budget	Work Orders	POs	
Locations			
COLLEGE_DEPT	FS PRO	CLIENT REQ SEAS	
VICE PRESIDENT	VPECS	CLIENT PRIORITY	
CONTACT NAME	MARTHA ELLIS	REVIEW CODE	50
CONTACT PHONE	5124711563	FS_PMCS PRIOR	0
PROJ ACCOUNTANT		DESIGN METHOD	
ARCHITECTURAL	ELLIS_MARTHA_S	CONST METHOD	
INT DESIGN		GEN CONTRACTOR	
ELECTRICAL		SPECIAL SCHED	
MECHANICAL		REGULATORY	
STRUCTURAL		TELE	N
CADD		PROJECT TYPE	
CONST COORD	MCCRACKEN_STEVEN	SQUARE FOOTAGE	
CONST PLANNER			
PROF SERV PROV			
OTHER PROVIDER			

- i) **COLLEGE_DEPT and VICE PRESIDENT** – Select the COLLEGE_DEPT and VICE PRESIDENT information from the appropriate list of values (LOV).
 - (1) If the Department or VP is not listed, see AD for suggestion. AD has to send an email to FAMIS Manager with a request to add a new entry.
- ii) **CONTACT NAME** - Enter the CONTACT NAME and
- iii) **CONTACT PHONE** – Enter the CONTACT PHONE.
 - (1) If there is an alternate contact person, enter that information in details of General Tab.
- iv) **Team Member** – Select Team Member information if applicable. Use the LOV buttons to choose the appropriate code. (Do NOT fill in a name.)
 - PROJ ACCOUNTANT** = PRX
 - ARCHITECTURAL** = ARX
 - INT DESIGN** = INX
 - ELECTRICAL** = ELX
 - MECHANICAL** = MEX
 - STRUCTURAL** = STX
 - CADD** = CTX
 - CONST COORD** = CCX
 - CONST PLANNER** = CPX
- v) **CLIENT REQ SEAS** – Select CLIENT REQ SEAS if available using LOV, otherwise TBD.
- vi) **CLIENT PRIORITY** – Select CLIENT PRIORITY if appropriate.
- vii) **REVIEW CODE** – Select REVIEW CODE if available.
- viii) **FS_PMCS PRIOR** – Select appropriate priority.

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- ix) **DESIGN METHOD** – Select DESIGN METHOD, or select TBD.
 - x) **CONST METHOD** – Select CONST METHOD, or select TBD.
 - xi) **SPECIAL SCHED** – Select SPECIAL SCHED if appropriate.
 - xii) **REGULATORY** – Select REGULATORY value if appropriate.
 - xiii) **TELE** – If Telecom work is required on the project, select Y in the TELE field, otherwise select TBD.
 - xiv) **PROJECT TYPE** – Select appropriate PROJECT TYPE or TBD.
- l. Click on the Schedule tab.

Capital Project Form – Schedule Tab



	Dur	Planned Dates		Forecasted Dates	
		Begin	End	Begin	End
FEASIBILITY	0				
PROGRAMMING	0				
SCHEMATIC DESIGN	30	7/12/2005	8/11/2005	7/12/2005	8/11/2005
FUNDING PENDING	0				
DESIGN DEVELOPMENT	0				
CONSTRUCTION DOCS	0				
BID	0				
MASTER SCHED	0				
CONSTRUCTION	0				
SUBSTANTIAL COMP	0				
ONSTRUCTION WARRANTY	0				

- i) **Dur** – Enter appropriate number of days here if applicable at time of CP Creation.
 - ii) **Begin Date** - Enter appropriate date here if applicable at time of CP Creation.
 - (1) If you enter a **Dur**, you must enter a **Begin Date**.
- m. Click on the Work Order tab.

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Capital Project Form – Work Order Tab

Capital Project Form – Work Order Tab

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

Parent CP: [Empty]

General Details Versions Approvals Schedule Accounts Budget **Work Orders** POs Locations

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

View...
Add...
Costs...

- n. **Work Order Tab** – [Refer to CP Work Order SOP](#) on the FAMIS Help Center and the appropriate [Business Rules](#) for your Department
- o. Click on the Attachments Button.
- p. **Notes** - [Refer to the Notes Attachment SOP](#) on the FAMIS Help Center and the appropriate [Business Rules](#) for your Department.
- q. Close the Capital Project form.