

Closing out FAMIS Capital Projects

PROCEDURE

1. Open the Capital Projects Workbench form

Capital Project Workbench Form – Header Section

CP Number	Building	Description	Status
CP165044	0040	WWH: REPLACE DOOR OF WWH	CNS*
CP137250	0040	WWH: PROVIDE TAS & F&LS COMPLIANT DOORS	CNS*
1306908	0040	WWH: MODERNIZE ELEVATORS #1, #2 & 3	CON:
CP005275	0040	WWH: ELECTRICAL DISTRIBUTION UPGRADE FOR 3RD & 4TH FLOORS	CON:
CP175230	0040	WWH: REMOVE BATHTUB AND PATCH OR REDO WALL	SCHI
CP132431	0442	WRW: REPLACE ROOF - DESIGN AND INSTALL	CON:
CP165889	0442	WRW: REPLACE HOT/COLD LATERALS AND RESIZE DUCTS IN 110	SCHI
CP081810	0442	WRW: RENOVATE SUITE 402 FOR PROF. BUCKLEY	SUBS
1306811	0442	WRW: RENOVATE GEN'L PURPOSE CLASSROOM 102 (DESIGN ONLY)	DESI
CP152464	0442	WRW: PROVIDE PATHWAY TO RM 416	SD_E
1207530	0442	WRW: MODERNIZE ELEVATOR #1	CON:
CP072336	0442	WRW: ACCESSIBILITY COMPLIANCE - DESIGN	SCHI

- a. Click on the View arrow and choose 'All Project Assigned to Me' (if not already set as your default view).
 - b. Select the appropriate CP and click on '**View/Edit...**' (This will open the CP Form)
2. CP Form
 - a. Click on the PO's tab.

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- i) Verify that all work orders have one of the following statuses:
 - (1) **CLOSED** - All work is complete, all labor is charged, and all materials are charged to this work order. Prevents further charges after five days.
 - (2) **PO_ACTIVE** - The WO has Active PO(s); user cannot close WO until all POs are COMPLETE. (Work Orders that are ready to close but have active Purchase Orders should be changed to PO_ACTIVE before being sent to the Business Services Accounting staff.)
 - (3) **CANCELED** - Used to inactivate work orders that will not be used and that have no charges against them.
 - ii) Verify that all secondary crews are in 'Complete' status.
 - (1) Right Click on WO number and choose **Close**. This opens the standard Work Order form.
 - (2) Click on the **Crews** tab to check the status of Secondary Labor.
 - iii) Verify that all Contract work orders are 'Complete'.
- c. Click on the Budget Tab.

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Capital Project Form – Budget Tab

Capital Project Form - Budget Tab

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

Version: 1 INITIAL CAPITAL PROJECT VERSION

Code	Description	Planned Amt	Forecasted Amt

Unallocated Funds: [] [] []

- i) Check for accuracy.
 - (1) **Amts** – Update amounts as needed to reflect final costs (created new version at the Versions tab).
- d. Click on the Schedule Tab.

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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				

- (1) Update the affected milestones in the Actual Dates column as appropriate.
 - (2) Don't forget to enter an Actual Begin and End date for the Construction Warranty row.
- ii) Click on the Versions Tab.

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Capital Project Form – General Tab – General Information Section

Capital Project Form - General Information Section

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

Parent CP: [Empty]

General Information (highlighted):

- Status: CANCELED
- Type: FS_PMCS_RENO
- Open Date: TUE JUL 12, 2005
- Assigned To: 11301
- Project Manager: 00382
- Funding Amount: [Empty]

Location: Site: UTM, Building: 0561

Requestor Information: Requestor: MUHLSTEIN_DENNIS

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) **Status** – Change project Status

(a) Change the Status of the project to ACCOUNTING.

iii) Click on the Attachments button.

Attachments Form

CP Attachments - CP032881

Notes | Documents | Mail

Title:

- PROJECT COORDINATION COMMENTS
- DESIGN MANAGER COMMENTS
- FUNDING COMMENTS
- CLIENT CONTACT COMMENTS
- OLD DESIGN MANAGER COMMENTS I

Text:

12/03/05 SHH: TWO CHANGE ORDERS BEING PROCESSED. ONE NEW FIRE EXIT ONLY SIGN ON ORDER, PER CHANGE ORDER REQUEST. ALL OTHER WORK COMPLETE.

08/13/05 SHH: 99% COMPLETE. TWO CHANGE ORDER ITEMS PENDING: 1) DOOR HOLD OPEN, 2) DOOR SIGN. AWAITING RECEIPT OF CONTRACTOR'S WARRANTY LETTER. AS-BUILT DRAWINGS RECEIVED. ALL CONTRACTOR CHANGE ORDERS NEGOTIATED AND BEING PROCESSED.

New... Edit...

(1) Select the Design Manager Comments and click on the **Edit** button.

(a) Click twice in the text field to deselect the highlighted text.

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- (b) At the top of the text box insert updated comment that the project status has been changed.
 - (c) See your departmental [Business Rules](#) for approved Notes format.
- (2) Close the Attachments form and Close the Capital Project form.