EXAMPLES NEEDED FOR TRAINING

Slide 6: Access the Mini-Project Workbench and go through the fields and the function buttons which access the project requests, project plans and phases, project work orders, scheduling phases, phase cost summary detail.

Slide 14: Have the students answer the questions in the exercise and then work through the answers on the projection screen when everyone is done.

Answers:
1. 14 work orders
2. Capital Project #115061528
3. $1,843.32 actual costs
4. May 31, 2006 due date
U115 MINI-PROJECT WORK ORDERS

SUBJECTS COVERED IN THIS UNIT:

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INTRODUCTION

What is a Mini-Project?

- Ability to organize and prioritize project requests before actually turning them into projects
- Ability to define “phases” of a project
- Provides a cost “roll up” of all the phases
- Can associate all work orders with a Capital Project number
- More reports are available for Mini-Projects than for Capital Projects
Intentionally Blank Slide
MINI-PROJECT WORKBENCH

1. Access the Mini-Projects Project Workbench from the Navigator screen.
2. The default view is All Active Projects. Click the Edit button to create a new view.
3. Use the scroll bar to scroll to the right and view all fields that make up the mini-project record. Query projects by utilizing any of the fields listed.

Function Buttons:

- **View Request...**: To view the details of the project request.
- **View Plan...**: To view the project plan, which includes estimated start and completion dates, phases and project manager assignment.
- **Add Request...**: To add a new project request.
- **Schedule...**: To schedule the phases of a selected project.
- **Work Orders...**: To view the work orders of a selected project.
- **Cost Summa...**: To view a cost summary of all the phases of the selected project; includes estimates, actual costs, balances and totals.
- **Reports...**: To access available COMPASS reports.
- **Export...**: Not currently being used by FM.
PROJECT REQUEST FORM
1. Click the checkbox next to the mini-project and click the **View Request...** button to bring up the *Project* form. The *Project* form lists the initial request data for the mini-project.

2. Click the **Add Request...** button to bring up a blank *Project* form and enter a new project request.

**Function Buttons:**

- **Billing...:** View the account number(s) to receive this project’s charges by calling up the *Billing* form.
- **Comments...:** View comments made about the project.
- **Amendments...:** Provides a numbered audit trail for changes to the project.
- **Routing...:** Shows the project’s routing history.
- **Dates...:** Lists the dates and times the project was entered, modified, closed.
- **Audit...:** Lists the changes made to project fields that have been selected for tracking.
PROJECT PLAN FORM

1. Click the checkbox next to the mini-project from the Project Workbench then click the View Plan... button to bring up the Project Plan form. The Project Plan form is used to define the specific work requirements of a project request by developing project phases. The fields already completed on the project request will auto-fill on the Project Plan form.

2. Assign Project Manager, Est Start Date and Est Completion Date from this form.

3. The Proj Start Date will auto-fill with the date the first charges are applied to the project.

4. Click the Phases button to bring up the Phase Summary form which lists phases that have been entered for this project. From this window, you can access the Phase form to view details of a selected phase, or to add a new phase. A phase is one segment of the project which includes a detailed description of the work and required resources (i.e., labor, material, invoices). After the phase has been entered into the Project Plan form, it is scheduled using the Schedule Project form. Each phase is scheduled independently, therefore, if a project has four phases, there will be four work orders generated; one work order for each phase.

Function Buttons:

• Billing: This button brings up the Billing form where you specify the account(s) to receive this project’s charges. If the estimated charges are encumbered, check the Encumber Estimate checkbox in this window.
• Estimates: This button brings up the Cost Estimate Summary form where estimates are entered for project charges.
• Comments: This button brings up the Comments window where you may add any desired comments.
• Amendments: This button brings up the Amendments form which provides an audit trail for changes.
• Dates: The Dates window lists the dates and times the project was entered, modified, and closed.
• Audit: This button brings up the Audit Trail form which lists changes to the project fields specified for tracking.
### PROJECT WORK ORDERS FORM

#### Work Order Details

<table>
<thead>
<tr>
<th>Work Order</th>
<th>Status</th>
<th>Description</th>
<th>Crew</th>
<th>Start Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>ES0662180</td>
<td>CLOSED</td>
<td>RM 382 WATER DAMAGE REPAIRS</td>
<td>CONS ADMIN</td>
<td></td>
</tr>
<tr>
<td>AM0662180</td>
<td>CLOSED</td>
<td>RM 382 WATER DAMAGE REPAIRS</td>
<td>CONS CARP</td>
<td></td>
</tr>
<tr>
<td>CP0662160</td>
<td>CLOSED</td>
<td>RM 382 WATER DAMAGE REPAIRS</td>
<td>CONS LABOR</td>
<td></td>
</tr>
<tr>
<td>CL0662160</td>
<td>CLOSED</td>
<td>RM 382 WATER DAMAGE REPAIRS</td>
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<td>ABATEMENT</td>
<td></td>
</tr>
</tbody>
</table>

#### Work Order Notes

- DIG UP PLANTER INSTALL LINK SEAL ON STORM PIPE.
- ICE DOOR OPENERS.
- IN RECEPTION AREA AND OFFICE - SEE WORK PLAN.
- EL RECEPTION AREA.
- 5 DOCK AREA - REPLACE COOLING COILS IN SUPPLY D19.
- ATE R902, R903, R904, R905, R906, R907.
PROJECT WORK ORDERS FORM

1. Click the checkbox next to the mini-project and click the Work Orders... button from the Project Workbench to bring up the Project Work Orders form. This form lists all work order numbers (phases), description, status, crew and start date. From this form, various functions can be performed on the work orders.

Function Buttons:

- **View...**: To access the Phase form and view the details of the highlighted work order/phase.
- **Close...**: To close a selected work order.
- **Add Req...**: To add a purchase requisition to a selected work order.
- **Add PO...**: To add a purchase order to a selected work order.
- **OK**: To close the Project Work Orders form.
EXERCISE 1

- On the Project Workbench form, query up PR003748 and answer the following questions.

1. How many work orders were created for this mini-project?
2. What is the capital project number associated with this mini-project?
3. What were the actual costs of work order C3Z1151528?
4. What was the due date for work order SN1151528?
The End!!!