FACILITIES MANAGEMENT
500 CAPITAL PROJECTS

U502: Mini-Projects and Mini-Project Reports
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 18: Have the students do exercise 1 on their own. When they are done, query mini-project number PR003540 and go through the questions, showing them how to find the answers.
1. Mike Doolittle, Paul Drews
2. 9 Phases
3. 585-332000-802010
4. Yes, Phase 6
5. Yes, 142052224

Slide 20: Access Mini-Project reports from the Project Workbench and run a report.

Slide 26: Allow the students to do exercise 2. When they are done, run a PROJECT REQUEST DETAIL BY STATUS report for building 144 and go through the answers to the questions.
1. 5 OPEN projects
2. 18.11 estimated hours for ACTIVE projects
U502 MINI-PROJECTS AND MINI-PROJECT REPORTS

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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

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Ver 1.1
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. Requester: DENNIS RAMHARR
   PR Status: OPEN
   Type: CON EST
   Description: ATT DENNIS RAMHARR REPAIR WATER DAMAGE

2. Requesting Information:
   - Name: DENNIS RAMHARR
   - Telephone: 5-9947
   - Alt. Requestor: STEVEN PAULING
   - Alt. Telephone: 5-8966
   - Request Date: FRI JUN 10, 2005

3. Equipment:
   - [Optional info]

4. General Information:
   - Type: CON EST
   - Project Manager: RAMHARRD
   - Priority: [Optional info]
   - Status: OPEN
   - Assigned To: SCHILLEJ
   - Due Date: FRI JUN 10, 2005
   - Requested Start Date: [Optional info]
   - Requested End Date: [Optional info]
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. Requester List:
   - DENNIS RAMHARRY
   - SMITH, ROBERT
   - BEAKER, AMANDA
   - ROSSK
   - STONE, CURT
   - SHARP, PAULINE
   - LINDNER, JIM
   - JOHNSON, JOHN
   - BENDER, PETER
   - NICKEL, ERIC

2. Project Details:
   - Project Number: PR0015525
   - Requestor: DENNIS RAMHARRY
   - Request Date: FRI, JUN 10, 2005
   - Request Type: CON EST
   - Status: OPEN
   - Assigned To: SCHILDE
   - Project Manager: RAMHARRY
   - Start Date: THU, JUN 23, 2005

3. Project Locations:
   - Site: 01
   - Building: 065
   - Floor: 03
   - Room: 382
   - Zone: EAST BANK

4. Phases:
   - Phases...
   - Billing...
   - Estimates...
   - Comments...
   - Amendments...
   - Dates...
   - Audit...
   - Print...
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

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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.
SCHEDULE PROJECTS FORM

1. Project List
2. Project Details
3. Work Orders
SCHEDULE PROJECTS FORM

1. Click the checkbox next to the mini-project and then click the Schedule... button from the Project Workbench to bring up the Schedule Projects form which is used to schedule phases of a project. The Schedule Projects form is used once the project has been approved and the work is ready to begin. Scheduling is the process of creating a work order from the information entered into the project phases. Only the phases that were created on the Phase form that have yet to be converted into work orders will appear in the Schedule Projects form.

2. Click the Sched checkbox next to the phase you would like to schedule.

3. Click the Schedule... button and a work order number will be generated for the selected phase.

Function Buttons:

• Schedule...: To schedule the selected phases and convert them into work orders.
• Don’t Schedule...: To cancel the scheduling process of the selected phases.
• Show Billing...: To view the billing information for the selected phase.
• View...: To view the detail information for the selected phase.
PHASE SUMMARY FORM

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1. Click the checkbox next to the mini-project and click the **Cost Summa...** button from the *Project Workbench* to access the *Phase Summary* form which lists all the phases of the project along with estimates, actual costs, committed costs, balances and totals.

2. Click and highlight a phase and then click the **View...** button to view the detailed information of the selected phase.

Reference Tabs:

- **Cost Details:** Summary of estimated and actual costs grouped by hours, labor amounts, material, invoices, equipment, contingency (miscellaneous costs).
- **Labor:** Detailed labor entry information for labor costs.
- **Material:** Detailed COMPASS part data if Issue Requests exist for the selected phase.
- **Invoice:** Detailed purchase order, invoice, and credit voucher information.
- **Equipment Rental:** Not currently being used by FM.
- **Misc Cost:** Miscellaneous cost entries if any for credit card transactions and Facility Support miscellaneous costs.
- **Billed:** Account number billed, date, and amount billed.
EXERCISE 1

Query Mini-Project number PR003540 and answer the following questions.

1. Who requested the project?
2. How many phases are there?
3. What is the billing account number for the project?
4. Are there any phases that haven’t been scheduled yet? If so, which ones?
5. Is the project associated with a Capital Project? If so, what is the Capital Project number?
MINI-PROJECT REPORTS

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Ver 1.1
MINI-PROJECT REPORTS

1. Click the Reports... button from the Project Workbench.
2. Click and highlight a report to run.
3. Click the Run Report button.
MINI-PROJECT REPORTS

4. Enter your password when the Database User Authentication window appears.
5. Click the **Submit** button.
6. Enter your selection criteria on the report *Parameter Value Input Form*.
7. Click the **Submit Query** button when all selection criteria has been entered.
MINI-PROJECT REPORTS

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MINI-PROJECT REPORTS

8. The report name and the date the report was run appears at the top of the form.
9. The report criteria appears below.
EXERCISE 2

- Run a PROJECT REQUEST DETAIL BY STATUS report for building 144 and answer the following questions.

1. How many OPEN mini-projects are there for the building?
2. What are the total estimated hours for the ACTIVE projects?
The End!!!

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