

Internal Work Agreement Definition

Since work order transactions are not awarded or allocated like CPPM contracts, the Internal Work Agreement Screen was created to address this need. This screen formalizes the agreement between project managers and internal O&M managers to provide work for capital projects. This screen displays phases once the internal work agreement and component are associated to the phase in the Contractor and Capital Project Blocks, respectively. The amount identified is the amount of committed cost for a given agreement line item (costs roll up to both the capital project and the work order, respectively). As phase transactions are approved, committed cost on the capital project is reduced while the expensed amount increases.

The capital project, component group, and component are required to save the initial record.

Creating internal work agreements, with defined committed cost, will produce the following transactions on the associated component budget and roll up to the component group and capital project budgets:

- Saving the agreement in an open status creates an associated anticipated cost on the capital project.
- Finalizing the agreement shifts the capital project anticipated cost to committed cost.
- As transactions are approved on the work order/phase, the capital project committed cost shifts to expensed costs.

When the capital project, component group, and component are entered on a phase, the associated finalized internal work agreement appears in the Phase Contractor Block. Once the phase is saved, a detail line is added to the internal work agreement work order detail section. This line has work order/phase hyperlinks to view pertinent work order/phase data.

Approved internal work agreements now display the Internal Work Amendment Icon to open easily internal work amendments with all the internal work agreement information prepopulated.

IWAs are tied to the CAMPUS SUPPORT COMPONENT GROUP. Sufficient Budget needs to be added to this component group prior to issuing IWAs.

Training Guide: ES-02-CPPM IWA Approval and NTP

Responsibility: ADMIN ASST FMCS / ADMIN ASSOC LRFP / PROJECT MANAGER FMCS

The ADMIN ASST FMCS, ADMIN ASSOC LRFP, or the PROJECT MANAGER FMCS will perform the following procedures in AiM for entering an Internal Work Agreement.

Create an Internal Work Agreement:

1. From WorkDesk, go to: **Capital Projects Channel**
(*Contract Administration Module > Internal Work Agreement*)



2. Click: **NEW**

3. Fill-in the following information:

AiM Internal Work Agreement

Save Cancel

View: 1028

Extra Description: WELLNESS CENTER ROOM 107-PAINT, CARPET, AND BLINDS

Status: REQUESTED

Type: EHS

Capital Project: CP15-0068

Request: Apr 29, 2015

Commitment: \$317.00

Amendment: \$0.00

Total: \$317.00

Expensed: \$0.00

Remaining: \$317.00

Enter once received.

4. The **Internal Work Agreement (IWA) Number** will populate automatically.

5. Select **Type**, Click: Zoom and select, the **Status** will automatically populate.

6. **Capital Project Number**, click: Zoom and select

7. Enter a complete IWA **Description**.

8. Complete the following dates when appropriate:

- a. **Request Date** Date requested.
- b. **Commitment** Approval date
- c. **Review Date** Date reviewed (*optionally used*)
- d. **Start Date** Date work is authorized to begin. (*Not before Commitment*)
- e. **End Date** Completion date

Line Item	Line	Description	Line Group	Component	Total	Expensed	Remaining

Remove Add

9. From Line Item, click: **ADD** and enter the following:

AiM Line Item

Done Add Cancel

View: 001

Extra Description: FACILITIES MGMT MISC

Capital Project: CP15-0068

Component Group: CAMPUS SUPT FMCS

Component: FACILITIES MGMT MISC

Agreement: 1028

Line Group: WELLNESS CENTER ROOM 107-PAINT,

Total Budget: \$0.00

Remaining: \$(317.00)

Commitment: \$317.00

Amendment: \$0.00

Line Total: \$317.00

Expensed: \$0.00

Remaining: \$317.00

Enter once received.

- a. Enter an accurate and complete **Description**
 - b. **Line Group**, click: 🔍 Zoom and select
 - c. **Component Group**, click: 🔍 Zoom and select Group and Component
 - d. Once received, enter **Commitment amount** received by the respective IWA Manager
10. Click: **Done** to return the Internal Work Agreement screen
11. Review for accuracy, click: **Save**

Next Step: ES-02-CPPM IWA Approval and NTP