

## Capital Project Definition

The **Capital Project** screen is the main source of information on a Capital Project and is intended to be a view of the Capital Project as a whole from an owner or project manager’s perspective. This screen allows a Capital Project to be managed based on how the work needs to be organized and managed, instead of how accounting, funding or 3<sup>rd</sup> party vendors wish to track it.

A Capital Project can be broken down into Component Groups and Components. Individual Component performance detail is summarized for Component Group level reporting. A Capital Project Component is a user-defined portion of a project that is specifically set up to have dates, people, activities and costs tracked separately for management, financial or reporting purposes. Components can be grouped together into a Component Group to further enhance the management of a Capital Project.

A minimum of one Component Group and one related Component are necessary to track budgets and expenses against a Capital Project. Component Groups are pre-defined and validated in order to keep reporting and management of projects consistent for the organization. Components, however, can be defined “on-the-fly” or selected from a pre-defined listing as required for a specific Capital Project. This allows for flexibility in how each Capital Project gets managed and tracked.

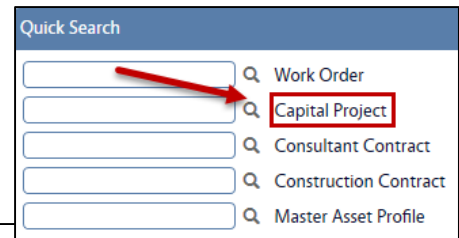
**\*\*Training Guide: CS-13-CPPM Project Initiation Please reference before entering a Capital Project.**

### Responsibility: ADMINISTRATIVE ASSISTANT

The administrative assistant to the respective project department will perform the following procedures in AiM for entering a Capital Project.




#### Create a Capital Project:

1. From Quick Search, click: **Capital Project**  
*(Capital Projects Module > Capital Project)*
2. Click: **NEW**
3. Fill-in the following information:



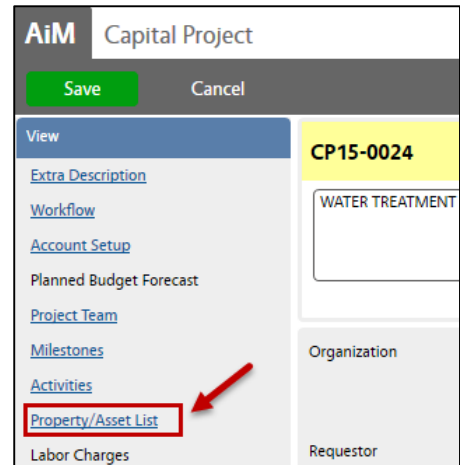
Category	Value
Total Allotment	\$146,560.82
Original Budget	\$5,284,427.40
Budget Revisions	\$(127,900.58)
Total Budget	\$5,156,526.82
Committed	\$146,560.82
Expensed	\$0.00
Anticipated	\$0.00
Remaining Budget	\$5,009,966.00
Remaining Allotment	\$0.00

4. The **Capital Project Number** will be automatically generated by the system.
5. Enter Capital Project title in the **Description**.

6. Select **Type**, Click:  Zoom and select, the **Status** will automatically populate.
7. Enter the Capital Project **Planned Budget** amount
8. Click:  Zoom, select **Organization**
9. Click:  Zoom, select **Manager Organization** and **Employee**

**Add Property/Asset**

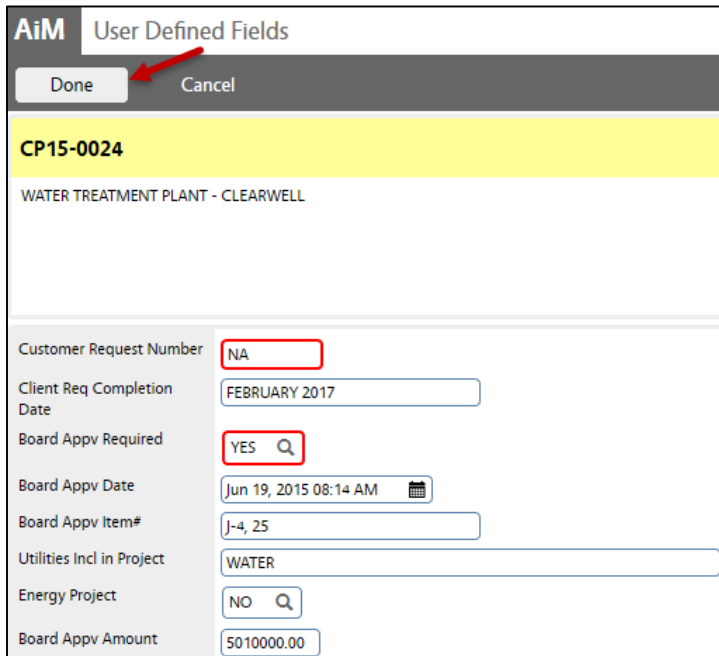
10. Select **Property/Asset List** (left side bar)
11. From Property, click: **Add** and enter the following:
  - a. Region
  - b. Facility
  - c. Property
  - d. Location (optional)
12. From Asset, click: **Add** and enter the following:
  - a. Asset Group
  - b. Asset



13. Click: **Done**

**User Defined Fields (UDF)**

14. Select **User Defined Fields** (left side bar)
15. Enter the following:



- a. Click: **Done**

16. From Capital Project screen, click: **Save**

