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*)

Capital Projects	•	Ø	8
0 Contract Administration ~ Internal Work Agreement ~ IWA FM ELECT DIST-NTP PAST 7 DAYS			
1 Contract Administration ~ Internal Work Agreement ~ IWA FM UTIL DIST-NTP PAST 7 DAYS			

2. Click: NEW

CA-04

CA-04-INTERNAL WORK AGREEMENT

3. Fill-in the following information:

CPPM -

AiM User Guide

AiM Internal Work Agreement About Logout								
Save Cancel								
View	1028				1	Status	REQUESTED Q	
Extra Description Workflow	WELLNESS CEN	TER ROOM 107-PAINT, CARPET, AND BLINDS				Туре 1	EHS Q	
Notes Log User Defined Fields						Reference Number	ENVIRONMENTAL HEALTH AND	SAFETY
Status History						Capital Project	CP15-0068	Q
Related Documents							IN HOUSE: ESTIMATE: DAVIS: W	ELLINESS
	Organization	Q	Request	Apr 29, 2015 🛗		Commitment		\$317.00
			Commitment			Amendment	Enter once	<u>\$0.00</u>
			Review			Total	received.	\$317.00
	Employee	٩	Start			Expensed		<u>\$0.00</u>
			End			Remaining		\$317.00

- 4. The Internal Work Agreement (IWA) Number will populate automatically.
- 5. Select **Type**, Click: ^Q Zoom and select, the **Status** will automatically populate.
- 6. Capital Project Number, click: ^Q Zoom and select
- 7. Enter a complete IWA **Description**.

8. Complete the following dates when appropriate:

a.	Request Date	Date requested.
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- 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					Remove	Add
Line	Description	Line Group	Component	Total	Expensed	Remaining

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

AiM Line Item						About Logout
Done Add	Cancel					
View	001		Agreement	1028		
Extra Description Notes Log Related Documents	FACILITIES MGMT N	lisc	Line Group	WELLNESS CENTER ROOM 107-PAINT,		
	Capital Project	CP15-0068 IN HOUSE: ESTIMATE: DAVIS:	Total Budget	Enter once	Commitment	C Totals
	Component Group		Remaining	\$(317.00)	Amendment	<u>\$0.00</u>
		CAMPUS SUPPORT			Line Total	\$317.00
	Component	FACILITIES MGMT MISC Q	Percent Complete		Expensed	<u>\$0.00</u>
		FACILITIES MGMT MISC			Remaining	\$317.00

CA-04-INTERNAL WORK AGREEMENT

AIM Internal Work Agreement About Logo								
Save Cancel								
View	1028				I Status	REQUESTED	٦	
Extra Description	WELLNESS CENTER ROOM	/ 107-PAINT, CARPET, AND BLINDS			Туре	EHS Q	_	
Workflow						ENVIRONMENTAL HEALTH A	ND SAFETY	
Notes Log					Reference Number			
User Defined Fields					Capital Project	CP15-0068	0	
Status History						IN HOUSE: ESTIMATE: DAVIS	WELLNESS	
Related Documents						ITTIOODE EDITINATE DAVIS		
	Organization	٩	Request	Apr 29, 2015 🛗	Commitment		\$317.00	
			Commitment		Amendment		<u>\$0.00</u>	
			Review		Total		\$317.00	
	Employee	Q						
			Start		Expensed		<u>\$0.00</u>	
			End		Remaining		\$317.00	
	Line Item					Remove	Add	
	Line	Description	Line Group	Component	Total	Expensed	Remaining	
	001	FACILITIES MGMT MISC		FACILITIES MGMT MISC	\$317.00	\$0.00	\$317.00	

- a. Enter an accurate and complete Description
- b. Line Group, click: ^Q Zoom and select
- c. **Component Group**, click: ^Q 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