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 3rd 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.


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:

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](image) the **Status** will automatically populate.
7. Enter the Capital Project **Planned Budget** amount
8. Click: ![Zoom](image), select **Organization**
9. Click: ![Zoom](image), 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**