

Capital Project/Purchase Initiation and Evaluation Process

Notes:
Request for capital project or purchase can be entered by anyone using the Maximo Service Request Screen. This should only be done when obvious Cap Item. Use regular service requests for assistance or troubleshooting.

Notes:
Requests for Capital Project or Purchase entered by an employee who is hourly or salary less than Grade 11 will be forwarded to the immediate supervisor for approval.

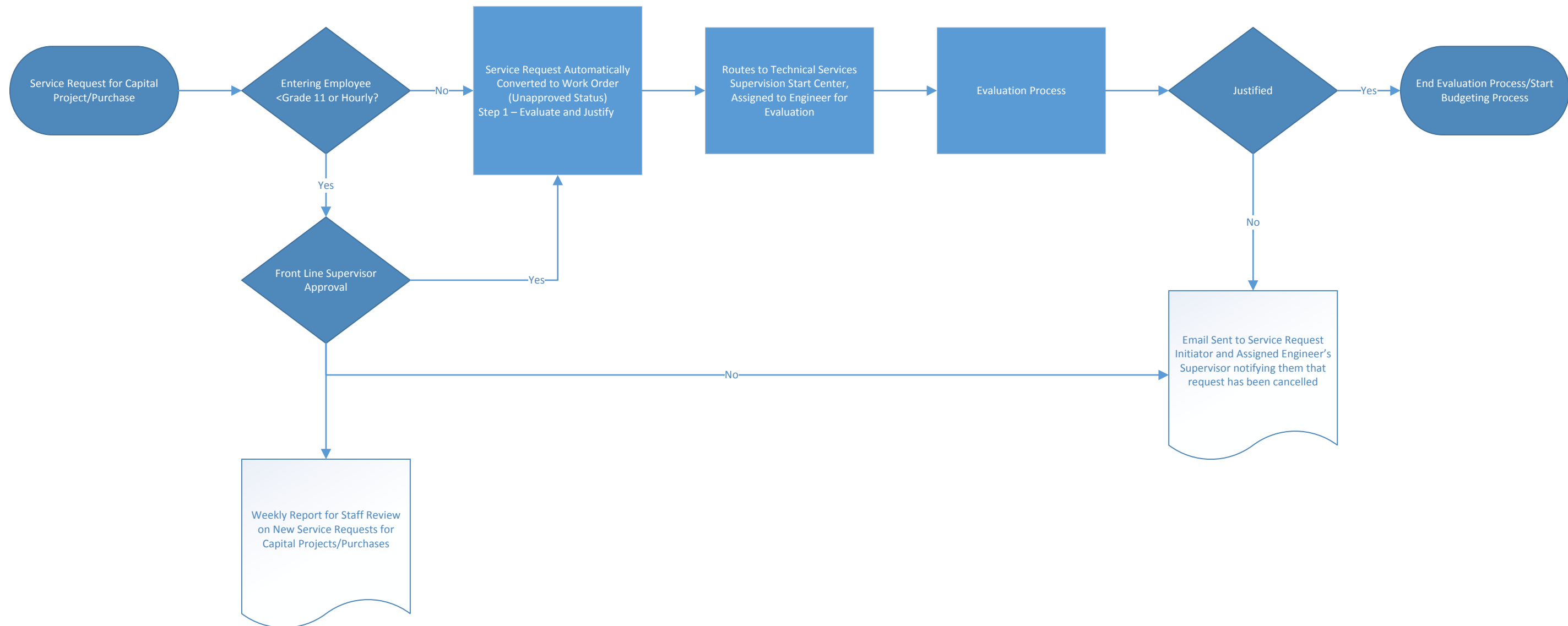
Notes:
Work Order automatically generated from Service Request. Work Order should have the status of "Engineering Evaluation" and not allow for charges against it. Step 1 of Work Order, Evaluate and Justify.

Notes:
TS Supervision start center should be available to all TS Engineering, Computer and Environmental Supervisors. Anyone can assign work orders from start center to individuals for evaluation.

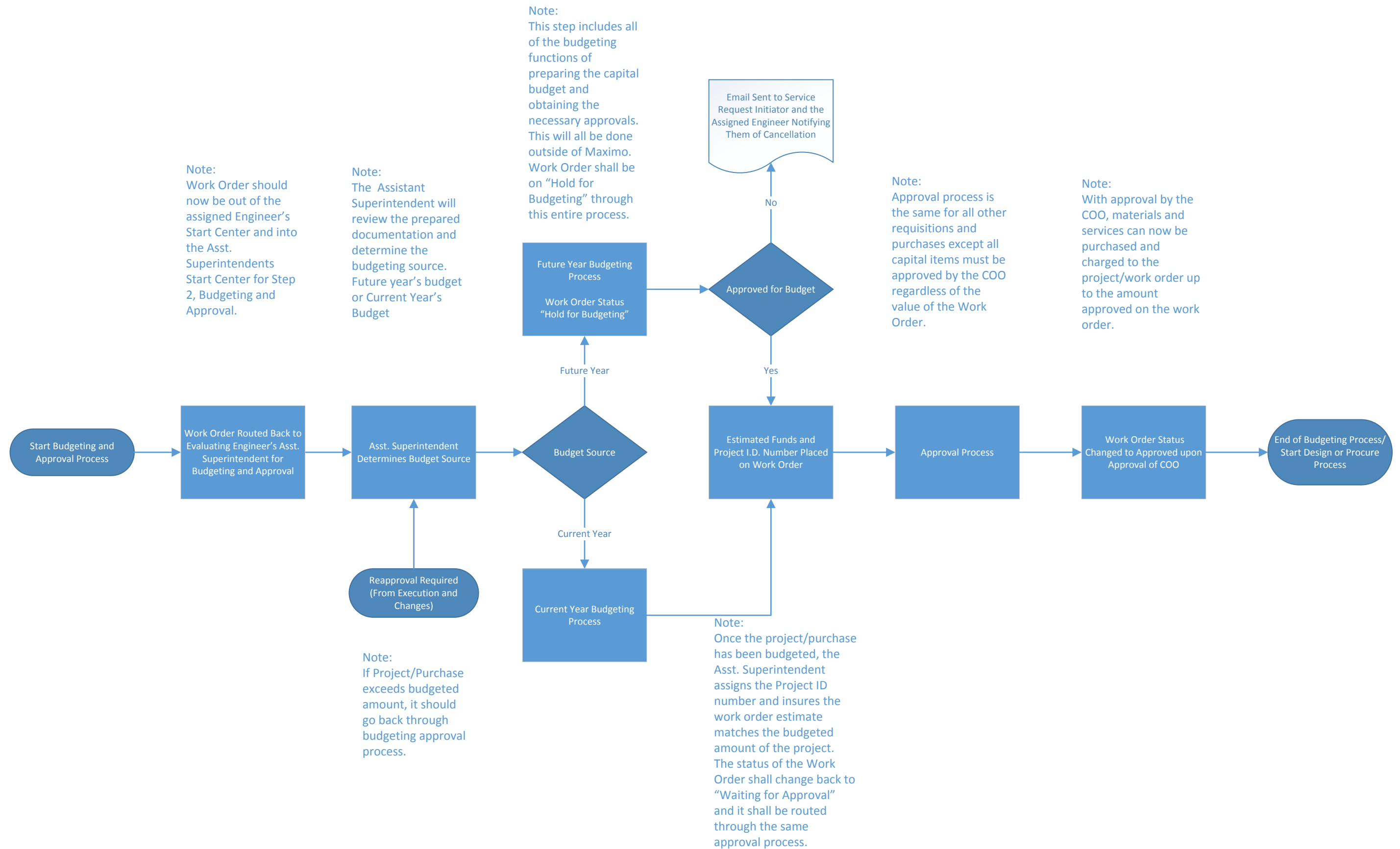
Notes:
Assigned Engineer evaluates work order and determines if the project is justified. He/she prepares the necessary justification information and documentation and attaches it electronically to the Work Order.

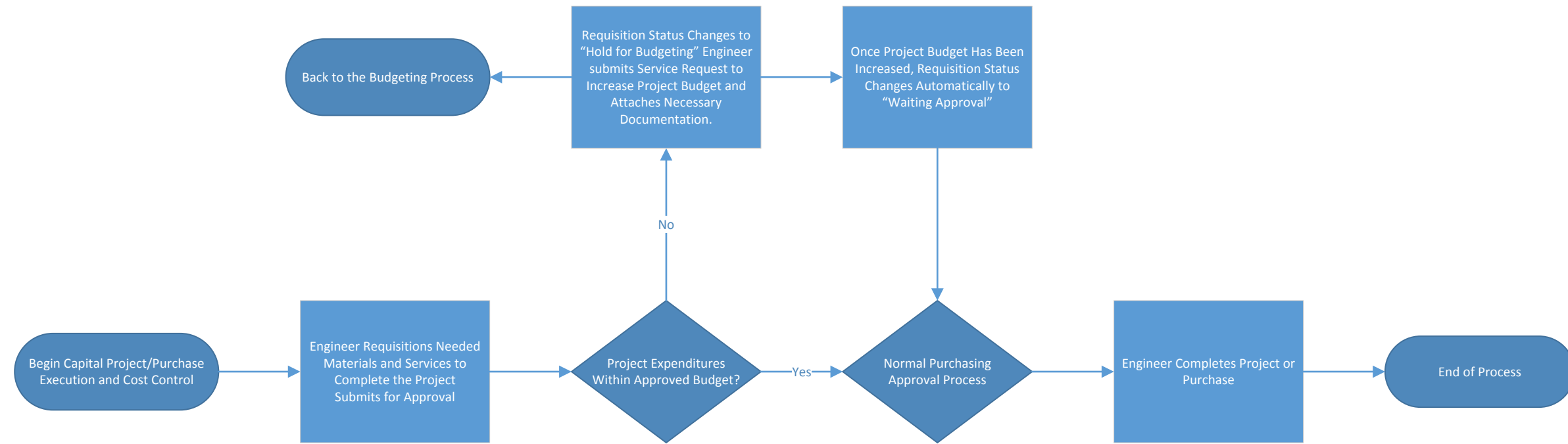
Notes;
If the project or purchase is justified, it goes to the budgeting process. If it is not justified, the Work Order is cancelled by the evaluating engineer and an email is sent to the originator and the assigned Engineer's Supervisor with an explanation of why it was cancelled.

Notes;
At this point, the assigned Engineer will route the Work Order to his/her Assistant Superintendent for Step 2, Budgeting and Approval. It should go out of the assigned Engineers Start Center and show up in the Asst. Superintendents Start Center.



Capital Project/Purchase Budgeting and Approval Process





Notes:
Based on encumbered funds, Maximo shall automatically not allow additional purchases against the work order once the encumbered amount exceeds the approved budget. Payments should still be allowed and time charges, just no additional purchases.