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Project Engineer Cheat Sheet

Is this work order complete and accurate?

Review work order information

Work order number
Site contact info
Customer contact info
Accurate Work Summary (Brief summary for scheduling)
Work Ordered Notes: detailed scope and job specific information access codes, COVID, check in, Containment, Any special requirements
Detailed scope description
Material and Labor description
T&M vs. Flat Rate
Proposals
Vendor quotes
Priority of WO (Emergency, urgent, normal, GC with schedule)
Gear, lighting, long lead item quotes
Customer PO's
Accurate hours in budget
Turnover meeting notes, recording
Subcontractors required
Submittals required
Project schedule/timeline
Drawings
Specifications
Permit requirements
Work force needs
Shutdown/energized work requirements
Special Equipment requirements
Tax information for PO's/Subcontracts
Prefab requirements/opportunities
Engineering/design requirements, Do we need to have drawings created?
UDF's Supervisor

Forecasting

Upcoming work
Manpower meetings
Material lead times
Update WO Material Tracker in teams weekly

Documentation

Submittals
Purchase orders
Material Tracking (Update WO Tracker in Teams weekly)
Change orders
RFI's
Permits (AHJ, Type, Standalone, quick, under GC)
Subcontracts
Reports
Coordination
Closeout: O&M's, Warranty Letter, As-build drawings
Metering reports
FLIR Reports
MOP's
Timecards
Review proposal/contract

Spectrum

Check **Needs Parts** status weekly and order material
Upload all documents:
Submittals returned (noting exceptions)
RFI Responses (communicating when received)
Drawings - (Permit sets from AHJ and Constructions sets)
Permits
Subcontracts
Warranty Letters
Update invoice notes when closeout documents have been sent with timestamp.
Schedule from GC or AM depending on project
Signed executed change orders
As-build drawings from technician
Executed change orders - update front page budget with original price noted in **Invoice**

Notes

Change status from needs parts to parts ordered add notes on when parts will arrive

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Dispatch Statuses

Unassigned indicates ready to schedule by the service coordinator.

Manager needs attention from a service supervisor or service manager to determine what is required to perform the work. This could be anything such as permits, drawings, subcontractors, long lead material items, or any other special requirements.

NeedsParts parts need to be ordered before the work can be scheduled. Once the parts have been ordered it can be put in **PartsOrderd** status until the parts arrive. When the parts arrive the work order is put into **Unassigned** status if nothing else is required to schedule the work.

Cust Hold customer has put the work on hold for some reason.

Scheduled is used when a customer requires a specific date for the work to be performed.

Assigned is used when an assignment has been created for the work order and is assigned to a technician in Field Connect.

Go Back a return trip is needed to complete assignment. This keeps the assignment on the tech's assignment list in field connect and keeps the work order open in spectrum. This status requires the tech communicating to the service coordinator what they are going back for and when. The service coordinator is responsible for putting **Go Back** work orders in the proper dispatch status after communicating with the tech.

Finished is used in when an individual assignment is finished in Field Connect and when all assignments have been finished in Spectrum. Putting an individual assignment in finished removes the assignment from the tech's assignment list in field connect. The tech should not put assignment in finished status unless that individual assignment is finished. Unfinished assignments should be put in **Go Back** status.

There can be multiple assignments for one work order. If the last assignment for a work order is put in finished status, the entire work order is automatically put into **Finished** status in Spectrum. When all assignments are in finished status, the entire work order is in **Finished** status and the technician has entered the 100% complete notes, the project accountant knows they can bill the work order.

%Billing is used by project accountant when progress billing a work order. Progress billing is when a work order can be billed as the work is being done instead of a lump sum when the work is complete. This is determined case by case and is typically based on the value of the contract.

WO Recvd is used by the project accountant to show that an invoice has been sent to the customer.

Completed is used by the project accountant when all invoices have been paid and all is cost accounted for to close the work order.