**Trainings:**

<https://insite.web.boeing.com/culture/displayGroupMedia.do?groupId=133596>

**Obtain Request/Requirement from Shop:**

*This may require a few meetings with the shop manager, SME, etc, if it’s for a new type of equipment, or very little if it’s simply a 1-for-1 replacement. We cannot contact equipment manufacturers for any kind of contractual pricing information, but we can ask for publically available catalog pricing.*

**Create New Internal Folder**:

[\\NW\Data\A5200MPP\EONorthData\Capital](file:///\\NW\Data\A5200MPP\EONorthData\Capital)

Template folder here (this can be copied and renamed)*:* [\\NW\Data\A5200MPP\EONorthData\Capital\New Capital Project Template](file:///\\NW\Data\A5200MPP\EONorthData\Capital\New%20Capital%20Project%20Template)

**Request Condition Code (if Replacing Aging Equipment):**

To Request Condition Code:

1. Open PER form: <https://wcms.web.boeing.com/sites/Auburn/MS/Pages/EE_PER.aspx>
2. Select “General Support” in “Request Type” field
3. Fill out required fields with appropriate information
4. For “Approver Information”, fill out with the information for the EO Finance Focal

Historical condition codes \*may\* be stored in Maximo – Everett Equipment Services can help with access: <http://mxesprod.web.boeing.com/maximo>

*Once your account is setup your username will be “m” followed by your BEMS ID (no spaces).*

Maintenance history can be requested from Equipment Services:

GRP ES Maintenance Analysts [esmaintenanceanalysts@exchange.boeing.com](mailto:esmaintenanceanalysts@exchange.boeing.com)

**Submit Cost Estimate Request to Equipment Engineering:**

To Submit Cost Estimate:

1. Open PER form: <https://wcms.web.boeing.com/sites/Auburn/MS/Pages/EE_PER.aspx>
2. Select “Cost Estimate” in “Request Type” field
3. For “Approver Information,” fill out with the information for the EO Finance Focal

Tom Baggott is typically our POC with FA&M

**Expenses:**

Expense: under $5,000

* Charge line:

Capital: between $5,000 and $100,000 with a useful life of 1 year

* Charge line:

Lump Sum Capital: above $100,000

* Charge line:

**Build Pitch:**

Coordinate with EO Finance Focal

Coordinate with safety/EHS for their slide

Check Surplus:

Link to email on pitch format:

[\\NW\Data\A5200MPP\EONorthData\Capital\Standard Work\FW Capital Scripts.msg](file:///\\NW\Data\A5200MPP\EONorthData\Capital\Standard%20Work\FW%20%20Capital%20Scripts.msg)

Link to Pitch Template:

[\\NW\data\A5200MPP\Capital Status\EO Fab BCA IMB Request Template.pptx](file:///\\NW\data\A5200MPP\Capital%20Status\EO%20Fab%20BCA%20IMB%20Request%20Template.pptx)

Pitch Checklist:

* Title Page (template slide 2)
* Request Description (template slide 3)
* Cost Savings/Cost Avoidance (template slide 7)
* ROI Calculation (template slide 8)
* RIO Assumptions (template slide 9)
* Condition Code (template slide 10)
* Load Chart – obtain from IE (template slide 11)
* As-Is/To-Be slide, with pictures (template slide 12)
* Area Map (template slide 13)
* Alternative Analysis (template slide 14)

**Create Status Slide:**

Create 3-square status slide with major milestones

Update Maj Prog Review to link to it with appropriate milestones

Status Slide Template: \\NW\Data\A5200MPP\EONorthData\Capital\New Capital Project

Template\Status Slide Template.pptx

Major Milestones for Status Slide:

* IMB Approved
* PO Released
* Design Complete (if applicable)
* Equipment Complete
* Equipment on Dock
* Ready for Use (RFU)

Detailed Milestones:

* Pitch completion – approved by Finance Focal
* Funding request approval - EO leadership
* Funding approval - IMB
* Funding release – charge line issued
* Submit Purchase Equipment Request
* Bid Spec complete
* Purchase Request submitted
* Purchase Order issued
* On dock
* Ensure all placarding is complete (c/w Equipment Engineer)
* Complete Asset Acceptance/RFU Forms:
* FAA Notification

Common Sticking Points:

* MES placards
* VDD documents

**Major Task Checklist:**

* Define requirements with customer
* Create new folder in share drive
* Obtain Condition Code
* Obtain Cost Estimate
* Build pitch
* Title Page (template slide 2)
* Request Description (template slide 3)
* Cost Savings/Cost Avoidance (template slide 7)
* ROI Calculation (template slide 8)
* RIO Assumptions (template slide 9)
* Condition Code (template slide 10)
* Load Chart – obtain from IE (template slide 11)
* As-Is/To-Be slide, with pictures (template slide 12)
* Area Map (template slide 13)
* Alternative Analysis (template slide 14)
* Build status slide