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COURSE BROCHURE

# Capital Project Materials Planning and Expediting Training Course

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Milan

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Registered in the United Kingdom and Saudi Arabia

# Capital Project Materials Planning and Expediting Training Course

**Ref:** 1207_45365 **Date:** 1 – 5 March 2027 **Location:** Milan **Fees:** 6200 GBP

Capital Project Materials Planning and Expediting is a 1-week training course for project materials coordinators, expeditors and project buyers, and it ends with a materials expediting and site delivery plan for one live project. Late valves, pumps and structural steel now decide whether engineering projects hit their milestones, so materials control has become a schedule discipline. Jupiter Prime Training runs this course in capital project materials planning and expediting.

## Why Capital Project Materials Planning and Expediting Matters Now

Three pressures shape project materials work today: fabrication yards and equipment makers quoting longer manufacturing slots, owners demanding earlier proof that critical equipment will arrive, and site managers facing idle crews. A project that links each purchase order to the construction sequence keeps its float; one that tracks materials on loose spreadsheets discovers shortages at the laydown yard. The course rests on the work breakdown structure WBS, the critical path method CPM, material requirements planning MRP and earned value management EVM, applied to purchase orders and deliveries.

## Who Gains Most from Capital Project Materials Planning and Expediting

- Coordinators who turn engineering take-offs into requisitions and track material status
- Expeditors who chase vendor fabrication progress, inspections and dispatch readiness
- Project buyers who place orders for long-lead equipment and bulk materials
- Planners who load delivery dates into the construction schedule
- Site materials controllers who receive, store and issue items to work fronts

A project materials team gains most when its buyer, expeditor and site controller attend together.

## Capital Project Materials Planning and Expediting Capabilities

Participants practise moving an item from the drawing to the work front, testing each step against the construction sequence.

- Build a material take-off and requisition register from engineering deliverables — project engineering lead
- Calculate required-on-site dates for long-lead equipment from the critical path — project planner
- Design an expediting level for each purchase order based on criticality — procurement manager
- Assess vendor progress reports and inspection test plans for slippage signals — project manager
- Specify packing, marking and shipping instructions that prevent site receipt delays — logistics coordinator
- Communicate materials shortages and recovery options in a weekly status report — project sponsor

## Key Capital Project Materials Planning and Expediting Terms

- Long-lead item — equipment or material whose manufacturing time threatens the project schedule unless ordered early in design.
- Required-on-site date — the latest date an item can reach site without delaying the activity that installs it.
- Material take-off — a quantified list of materials extracted from drawings and specifications for requisitioning.
- Expediting — structured follow-up with vendors to confirm and protect agreed manufacturing and delivery dates.
- Inspection and test plan — a vendor document listing the checks, hold points and witness points during fabrication.
- Overage, shortage and damage report — the site record of discrepancies found when materials are received.

## Capital Project Materials Planning and Expediting Day by Day

## Day 1: Materials in the Project Lifecycle

- Work Breakdown Structure Mapping — Which Packages Drive Materials Demand
- Engineering Deliverables Register — When Drawings Release Quantities for Purchase
- Material Take-Off Methods — Bulk Versus Tagged Items and Allowances
- Material Requirements Planning Logic — Netting Stock Against Project Demand
- Materials Status Codes — Tracking Items from Requisition to Installation

## Day 2: Long-Lead Equipment and Scheduling

- Critical Path Method Review — Locating Equipment That Controls Project Float
- Required-On-Site Date Calculation — Back-Scheduling from Installation Activities
- Long-Lead Identification Review — Early Purchase Decisions During Design
- Vendor Document Schedules — Approval Cycles That Release Fabrication
- Procurement Milestone Linking — Tying Orders to the Master Schedule

## Day 3: Expediting and Vendor Surveillance

- Expediting Levels Matrix — Desk, Field or Resident Follow-Up Choice
- Vendor Progress Reports — Reading Fabrication Percentages Against Plan
- Inspection and Test Plans — Hold Points That Gate Dispatch
- Sub-Supplier Tracking — Castings, Forgings and Hidden Lead Times
- Recovery Options Log — Resequencing, Air Freight or Alternate Sourcing

## Day 4: Shipping, Receipt and Site Control

- Packing and Marking Instructions — Identification That Speeds Site Receipt
- Heavy-Lift and Out-of-Gauge Logistics — Route Surveys and Permits
- Laydown Yard Layout — Storage Zones Matched to Work Fronts
- Overage, Shortage and Damage Reporting — Claims and Replacement Orders
- Material Issue and Reconciliation — Surplus Control at Project Close

## Day 5: Practising the Materials Expediting and Site Delivery Plan

- Earned Value Management for Materials — Measuring Procurement Progress Honestly
- Applying Required-On-Site Dates — Testing a Live Equipment List
- Applying the Expediting Levels Matrix — Ranking a Purchase Order Portfolio
- Applying Laydown and Receipt Rules — Site Readiness Checklist
- Materials Expediting and Site Delivery Plan — Completing and Presenting It

## Applying Capital Project Materials Planning and Expediting After the Course

- Rebuild the long-lead equipment list on a current project with required-on-site dates calculated from the critical path.
- Assign an expediting level to each open purchase order and run the first weekly materials status report with vendors.

## Capital Project Materials Planning and Expediting Questions FAQ

### What is capital project materials planning and expediting, and why does it matter now?

It is the discipline of quantifying, ordering, chasing and receiving project materials so they reach site before installation. It matters now because longer fabrication slots and tighter construction windows mean one late item can stall an entire work front.

### Which roles gain most from capital project materials planning and expediting?

Materials coordinators, expeditors, project buyers, planners and site materials controllers gain most. You benefit whenever your role touches a purchase order, on oil and gas or infrastructure projects.

## How does capital project materials planning and expediting differ from a strategic supply chain course?

It works at the level of a single project and its purchase orders, not an organisation's supply network. A strategic course chooses supply models; this one protects installation dates on one project.

## What do you bring back from capital project materials planning and expediting?

You bring back a materials expediting and site delivery plan for one of your projects. It lists long-lead items, required-on-site dates, expediting levels and receipt rules.

## Capital Project Materials Planning and Expediting: The Way Forward

The materials expediting and site delivery plan first informs which purchase orders receive resident or field expediting. Project managers, buyers and site controllers use it at the weekly materials meeting to agree recovery actions. After its first use on a live project, revisit the required-on-site dates as the construction sequence shifts.