Capital Project Process Flow Chart Prepared for Oklahoma State University
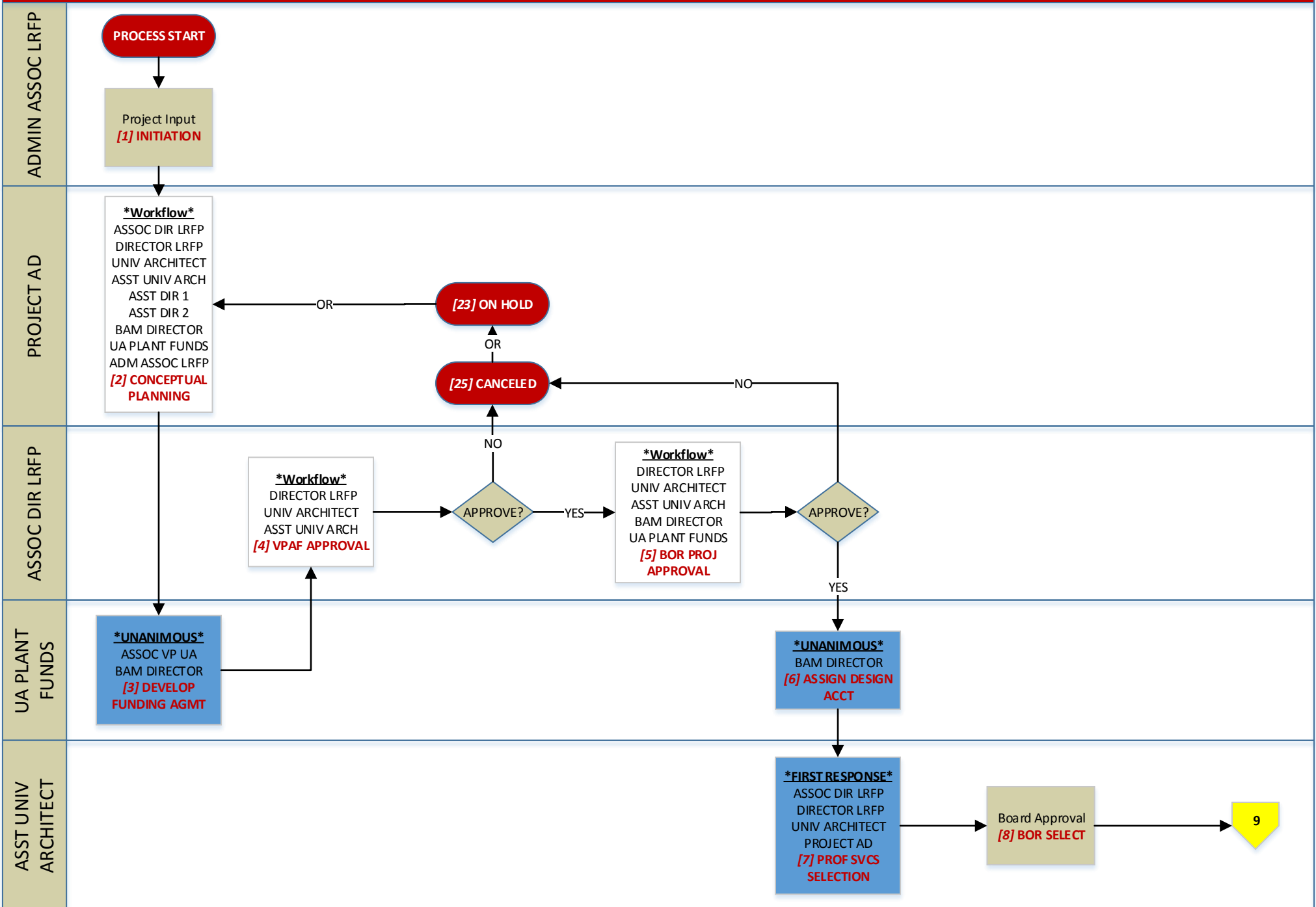
AiM Capital Project Process – LRFP Phase I (Selection)

Serial Workflow | **Parallel Workflow** | **Informational Workflow**
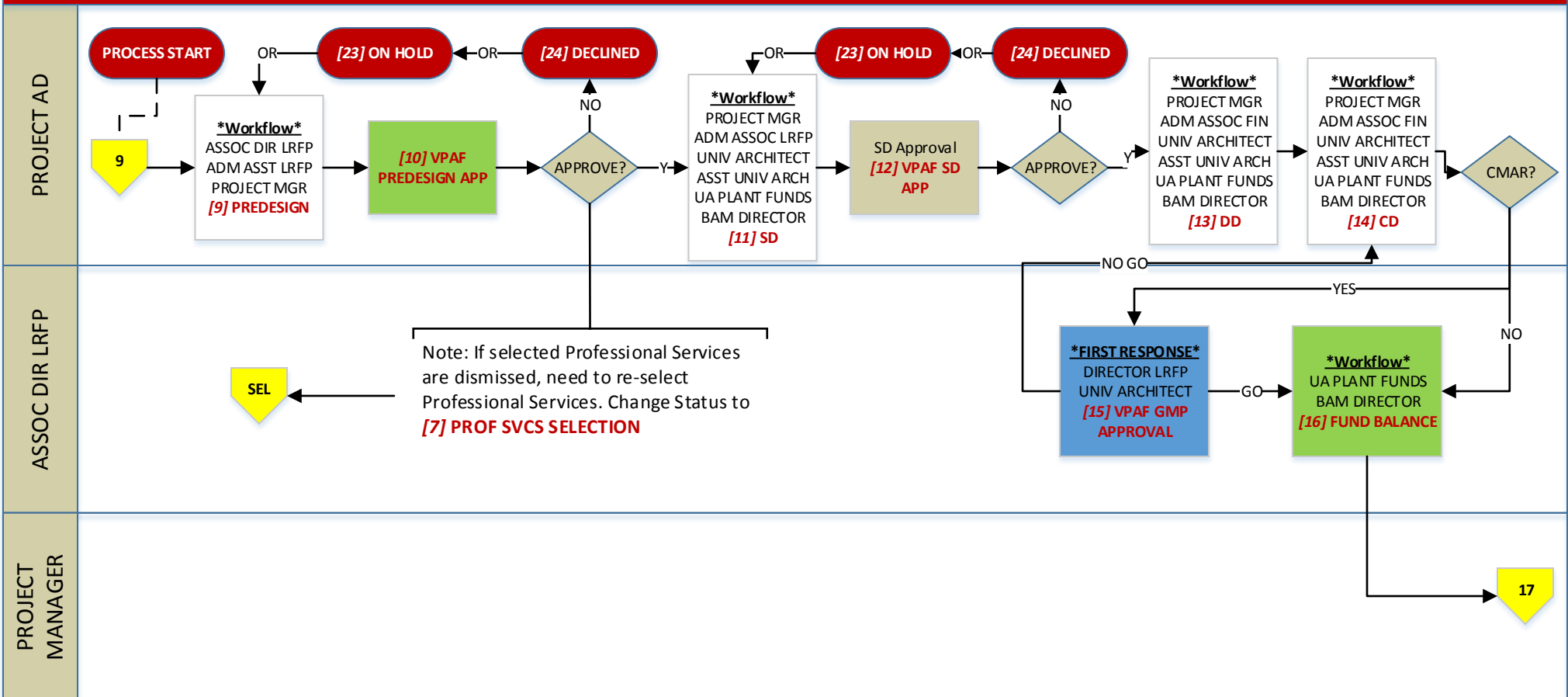
Prepared for: Oklahoma State University

ADMIN ASSOC LRFP

PROCESS START

Project Input
[1] INITIATION

PROJECT AD

Workflow
ASSOC DIR LRFP
DIRECTOR LRFP
UNIV ARCHITECT
ASST UNIV ARCH
ASST DIR 1
ASST DIR 2
BAM DIRECTOR
UA PLANT FUNDS
ADM ASSOC LRFP
[2] CONCEPTUAL PLANNING

[23] ON HOLD

OR

[25] CANCELED

NO

ASSOC DIR LRFP

Workflow
DIRECTOR LRFP
UNIV ARCHITECT
ASST UNIV ARCH
[4] VPAF APPROVAL

APPROVE? — YES

Workflow
DIRECTOR LRFP
UNIV ARCHITECT
ASST UNIV ARCH
BAM DIRECTOR
UA PLANT FUNDS
[5] BOR PROJ APPROVAL

APPROVE?

YES

NO

UA PLANT FUNDS

UNANIMOUS
ASSOC VP UA
BAM DIRECTOR
[3] DEVELOP FUNDING AGMT

UNANIMOUS
BAM DIRECTOR
[6] ASSIGN DESIGN ACCT

ASST UNIV ARCHITECT

FIRST RESPONSE
ASSOC DIR LRFP
DIRECTOR LRFP
UNIV ARCHITECT
PROJECT AD
[7] PROF SVCS SELECTION

Board Approval
[8] BOR SELECT

9

AiM Capital Project Process – LRFP Phase II (Design)

Prepared for: Oklahoma State University

PROJECT AD

PROCESS START

9

[23] ON HOLD — OR — **[24] DECLINED**

[23] ON HOLD — OR — **[24] DECLINED**

Workflow
ASSOC DIR LRFP
ADM ASST LRFP
PROJECT MGR
[9] PREDESIGN

[10] VPAF PREDESIGN APP

APPROVE? — NO / Y

Workflow
PROJECT MGR
ADM ASSOC LRFP
UNIV ARCHITECT
ASST UNIV ARCH
UA PLANT FUNDS
BAM DIRECTOR
[11] SD

SD Approval
[12] VPAF SD APP

APPROVE? — NO / Y

Workflow
PROJECT MGR
ADM ASSOC FIN
UNIV ARCHITECT
ASST UNIV ARCH
UA PLANT FUNDS
BAM DIRECTOR
[13] DD

Workflow
PROJECT MGR
ADM ASSOC FIN
UNIV ARCHITECT
ASST UNIV ARCH
UA PLANT FUNDS
BAM DIRECTOR
[14] CD

CMAR?

NO GO

YES

NO

ASSOC DIR LRFP

SEL

Note: If selected Professional Services are dismissed, need to re-select Professional Services. Change Status to *[7] PROF SVCS SELECTION*

FIRST RESPONSE
DIRECTOR LRFP
UNIV ARCHITECT
[15] VPAF GMP APPROVAL

— GO —

Workflow
UA PLANT FUNDS
BAM DIRECTOR
[16] FUND BALANCE

PROJECT MANAGER

17

AiM Capital Project Process – LRFP Phase III (Construction)

Serial Workflow   **Parallel Workflow**   **Informational Workflow**
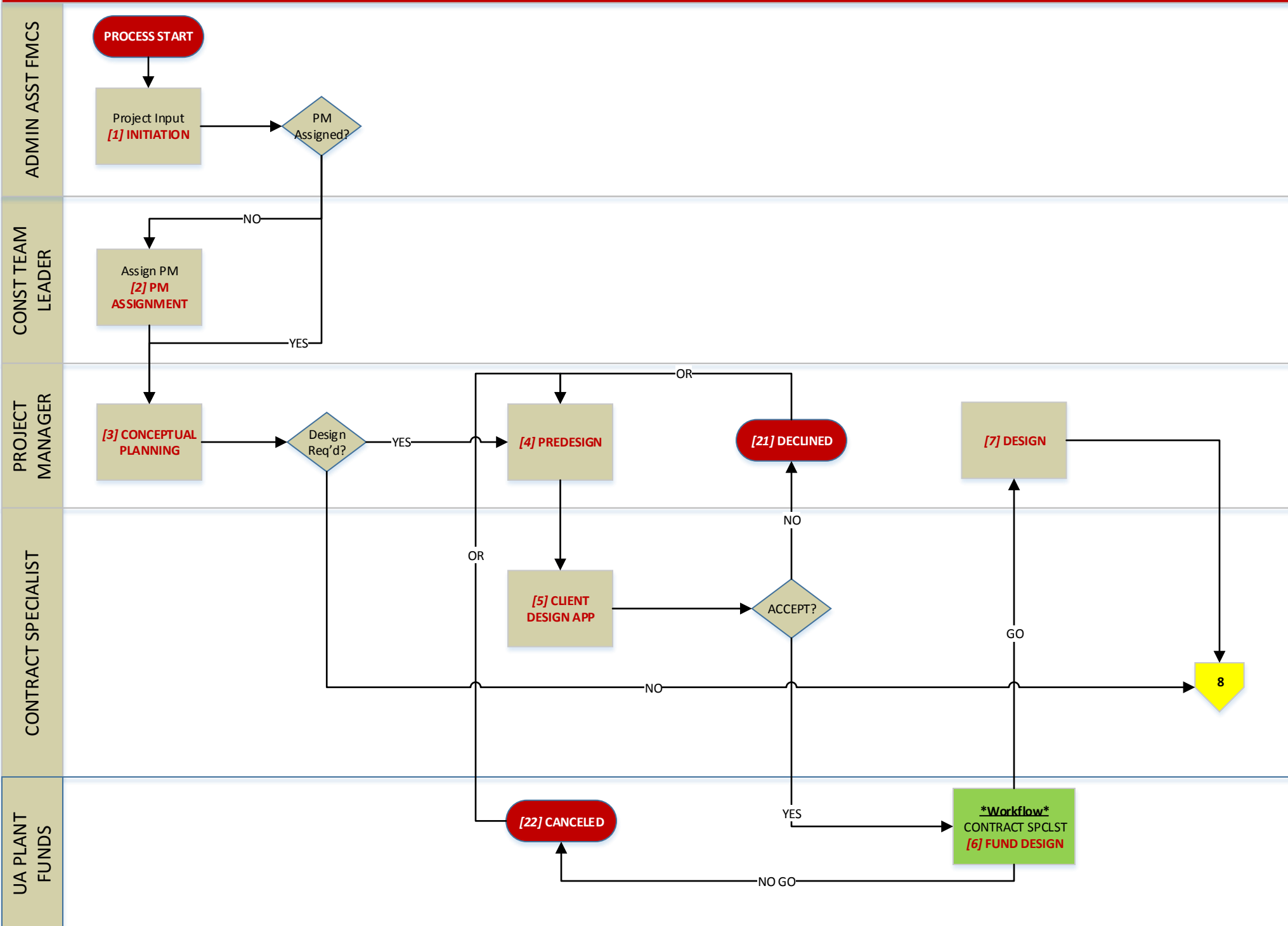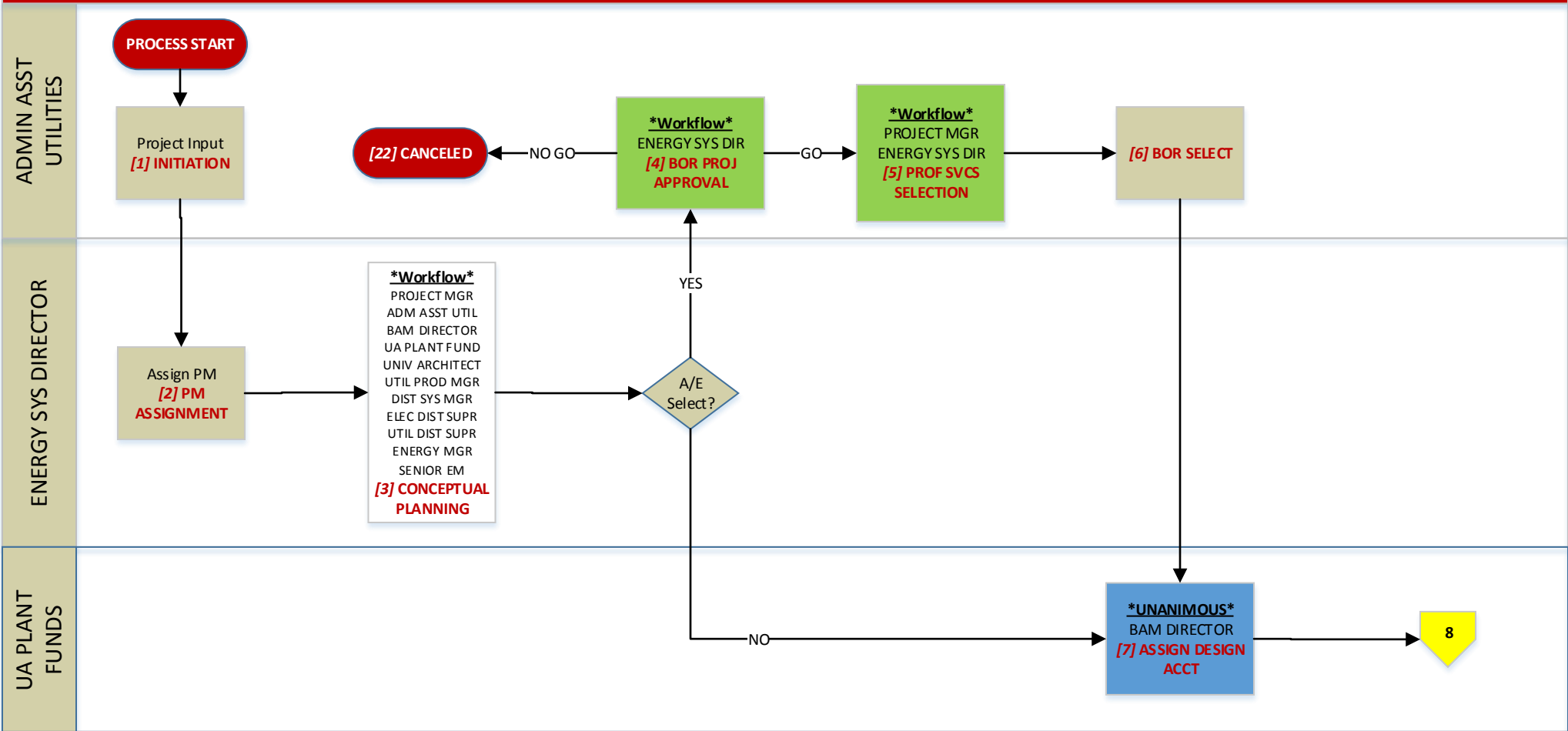
Prepared for: Oklahoma State University

PROJECT MANAGER

PROCESS START

17

Preconstruction
[17] NTP

[18] CONSTRUCTION

ASSOC DIR LRFP

UNANIMOUS
PROJECT MANAGER
PREV MAINT SPCLST
ADMIN ASSOC LRFP
PROJECT AD
[19] CONSTR CLOSEOUT

Workflow
ADMIN ASSOC LRFP
UA PLANT FUNDS
[20] FINANCIAL CLOSEOUT

ADMIN ASSOC LRFP

[21] PROJECT CLOSEOUT

[22] CLOSED

AiM Capital Project Process – FMCS (Design)

Legend:
- Serial Workflow (green)
- Parallel Workflow (blue)
- Informational Workflow (white)

ADMIN ASST FMCS

- PROCESS START
- Project Input **[1] INITIATION**
- PM Assigned?

CONST TEAM LEADER

- NO
- Assign PM **[2] PM ASSIGNMENT**
- YES

PROJECT MANAGER

- **[3] CONCEPTUAL PLANNING**
- Design Req'd?
- OR
- YES
- **[4] PREDESIGN**
- OR
- **[21] DECLINED**
- **[7] DESIGN**

CONTRACT SPECIALIST

- OR
- **[5] CLIENT DESIGN APP**
- ACCEPT?
- NO
- GO
- NO
- 8

UA PLANT FUNDS

- **[22] CANCELED**
- YES
- ***Workflow*** CONTRACT SPCLST **[6] FUND DESIGN**
- NO GO

AiM Capital Project Process – FMCS (Construction)

Serial Workflow | Parallel Workflow | Informational Workflow

Prepared for: Oklahoma State University

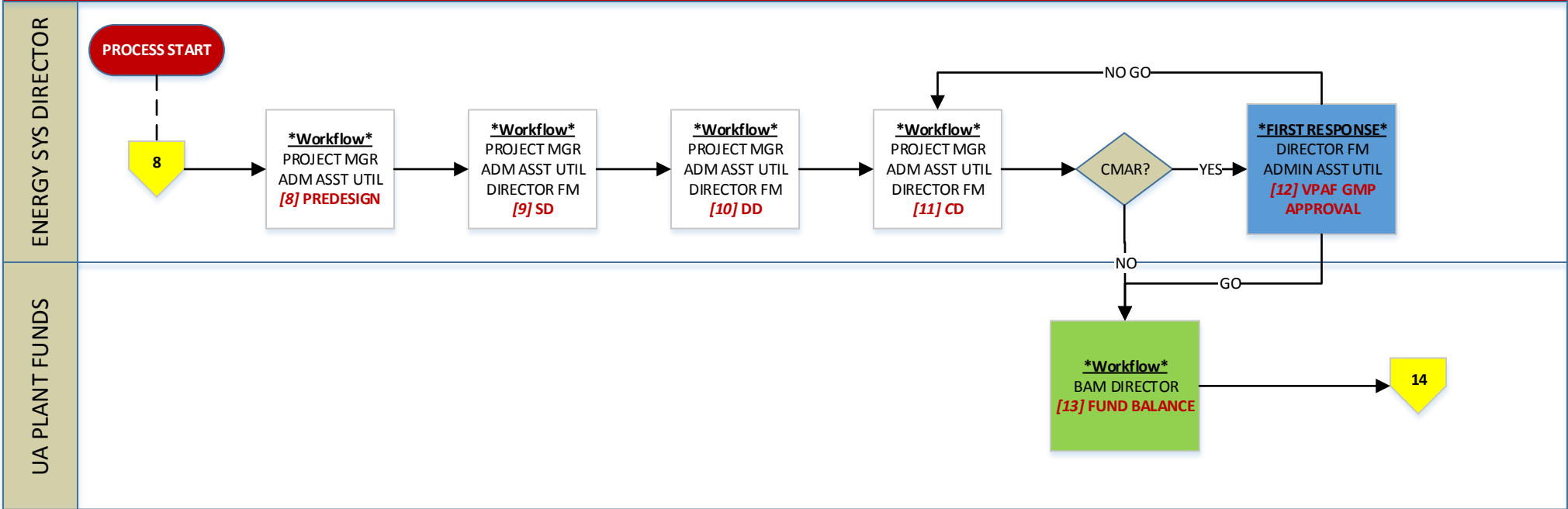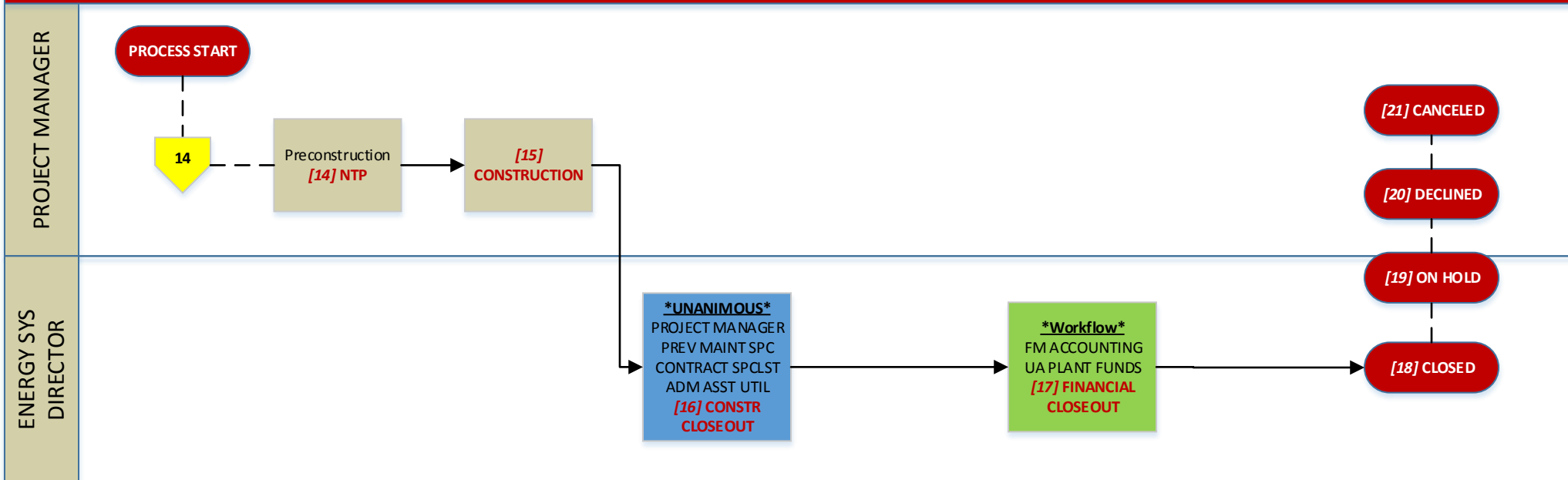**PROJECT MANAGER**

PROCESS START

8

NO → NO GO

[8] DEVELOP SOW → [9] SOW APPROVAL → Approved? → *Workflow* [10] ESTIMATING

YES

[14] NTP → [15] CONSTRUCTION

GO

CONTRACT SPECIALIST

[21] DECLINED

NO GO

Workflow PROJECT MANAGER [11] ESTIMATE APPROVAL → Setup Contract [13] CONTRACT SETUP

UNANIMOUS PROJECT MANAGER PREV MAINT SPC [16] CONSTR CLOSEOUT

[20] CLOSED

Send Final Closeout Letter [18] PROJECT CLOSEOUT

GO

UA PLANT FUNDS

Workflow [12] FUND CONSTRUCTION

Workflow FM ACCOUNT [17] FINANCIAL CLOSEOUT

AiM Capital Project Process – Utility CMAR Phase I (Selection)

Legend:
- 🟩 Serial Workflow
- 🟦 Parallel Workflow
- ⬜ Informational Workflow

ADMIN ASST UTILITIES

PROCESS START

Project Input
[1] INITIATION

[22] CANCELED ← NO GO ← ***Workflow***
ENERGY SYS DIR
[4] BOR PROJ APPROVAL → GO → ***Workflow***
PROJECT MGR
ENERGY SYS DIR
[5] PROF SVCS SELECTION → **[6] BOR SELECT**

ENERGY SYS DIRECTOR

Assign PM
[2] PM ASSIGNMENT →

Workflow
PROJECT MGR
ADM ASST UTIL
BAM DIRECTOR
UA PLANT FUND
UNIV ARCHITECT
UTIL PROD MGR
DIST SYS MGR
ELEC DIST SUPR
UTIL DIST SUPR
ENERGY MGR
SENIOR EM
[3] CONCEPTUAL PLANNING

A/E Select? — YES ↑ / NO →

UA PLANT FUNDS

UNANIMOUS
BAM DIRECTOR
[7] ASSIGN DESIGN ACCT → **8**

AiM Capital Project Process – Utility CMAR Phase II (Design)

Serial Workflow **Parallel Workflow** **Informational Workflow**

ENERGY SYS DIRECTOR

PROCESS START

8

Workflow
PROJECT MGR
ADM ASST UTIL
[8] PREDESIGN

Workflow
PROJECT MGR
ADM ASST UTIL
DIRECTOR FM
[9] SD

Workflow
PROJECT MGR
ADM ASST UTIL
DIRECTOR FM
[10] DD

Workflow
PROJECT MGR
ADM ASST UTIL
DIRECTOR FM
[11] CD

CMAR? — YES →

NO GO

FIRST RESPONSE
DIRECTOR FM
ADMIN ASST UTIL
[12] VPAF GMP
APPROVAL

NO

GO

UA PLANT FUNDS

Workflow
BAM DIRECTOR
[13] FUND BALANCE

14

AiM Capital Project Process – Utility CMAR Phase III (Construction)

Serial Workflow Parallel Workflow Informational Workflow

PROJECT MANAGER

PROCESS START

14

Preconstruction
[14] NTP

[15]
CONSTRUCTION

[21] CANCELED

[20] DECLINED

ENERGY SYS DIRECTOR

UNANIMOUS
PROJECT MANAGER
PREV MAINT SPC
CONTRACT SPCLST
ADM ASST UTIL
[16] CONSTR
CLOSEOUT

Workflow
FM ACCOUNTING
UA PLANT FUNDS
[17] FINANCIAL
CLOSEOUT

[19] ON HOLD

[18] CLOSED

AiM Capital Project Process – Utility Standard (Design)

Serial Workflow	Parallel Workflow	Informational Workflow

Prepared for: Oklahoma State University

ADMIN ASST UTILITIES

PROCESS START

Project Input
[1] INITIATION

[22] ON HOLD

ENERGY SYS DIRECTOR

Assign PM
[2] PM ASSIGNMENT

Workflow
PROJECT MGR
ADM ASST UTIL
ENERGY SYS DIR
UNIV ARCHITECT
UTIL PROD MGR
DIST SYS MGR
ELEC DIST SUPR
UTIL DIST SUPR
ENERGY MGR
SENIOR EM
[3] CONCEPTUAL PLANNING

DESIGN SELECT

NO GO

NO DESIGN

Workflow
PROJECT MANAGER
ENERGY SYS DIR
[5] PREDESIGN

Assign PM
[8] ESTIMATING

ON CALL A/E

IN-HOUSE

GO

UA PLANT FUNDS

UNANIMOUS
BAM DIRECTOR
[4] ASSIGN DESIGN ACCT

Workflow
BAM DIRECTOR
[9] FUND CONSTRUCTION

PROJECT MANAGER

Assign PM
[6] DESIGN

Assign PM
[7] DEVELOP SOW

11

GO

CONTRACT SPECIALIST

UNANIMOUS
ENERGY SYS DIR
ADMIN ASST UTIL
PROJECT MANAGER
[10] CONTRACT SETUP

NO GO

[22] ON HOLD

AiM Capital Project Process – Utility Standard (Construction)

| | Serial Workflow | Parallel Workflow | Informational Workflow |

PROJECT MANAGER

PROCESS START

11

Project Input
[11] **NTP**

Project Input
[12] **CONSTRUCTION**

[18] **CANCELED**

ENERGY SYS DIRECTOR

[17] **DECLINED**

[16] **ON HOLD**

UNANIMOUS
PROJECT MANAGER
PREV MAINT SPC
CONTRACT SPCLST
ADMIN ASST UTIL
[13] **CONSTR CLOSEOUT**

Workflow
FM ACCOUNTING
UA PLANT FUNDS
[14] **FINANCIAL CLOSEOUT**

[15] **CLOSED**
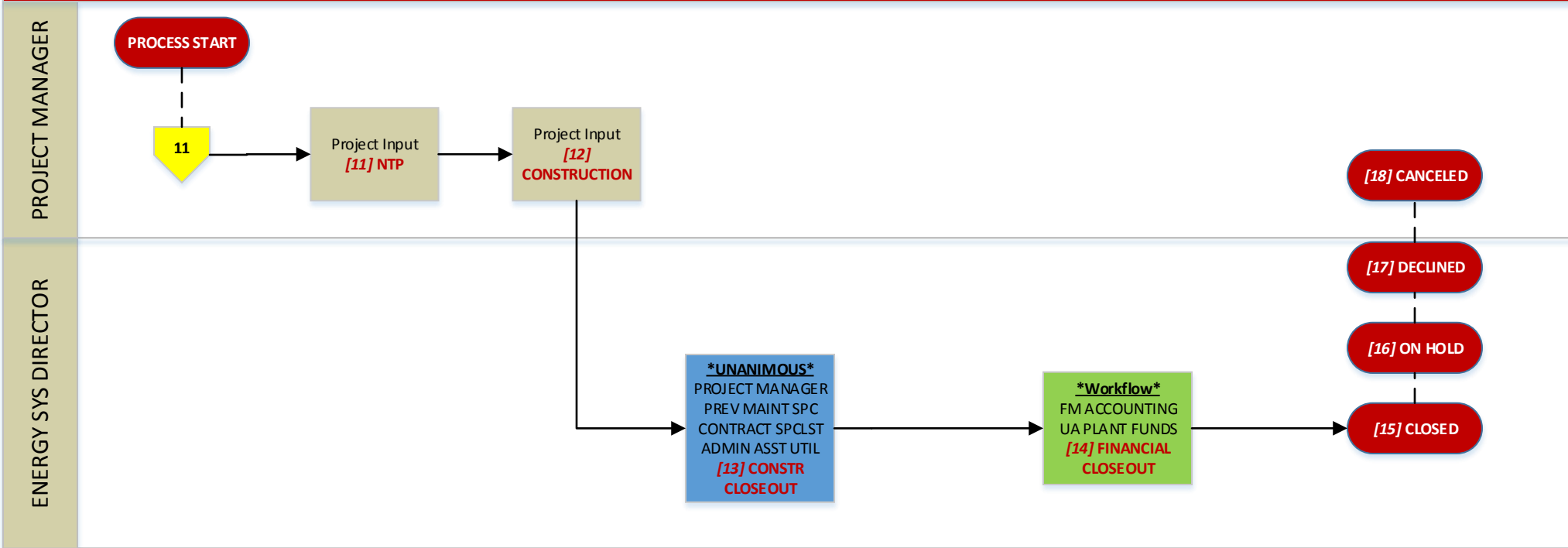
AiM Capital Project Process – Landscape Services (Design)

Serial Workflow · **Parallel Workflow** · **Informational Workflow**

ADMIN ASST FMCS

- PROCESS START
- Project Input **[1] INITIATION**

LANDSCAPE SVC MGR

- **[2] CONCEPTUAL PLANNING**
- Design Req'd? — YES / NO
- ***Workflow*** LANDSCPE ARCH PROJECT MGR **[3] PREDESIGN**
- **[20] DECLINED**
- **[21] CANCELED**

PROJECT MANAGER

- **[4] CLIENT DESIGN APP**
- ACCEPT? — NO / YES
- **[6] DESIGN**

UA PLANT FUNDS

- ***Workflow*** CONTRACT SPCLST **[5] FUND DESIGN**
- GO
- NO GO
- OR
- 7
- 2
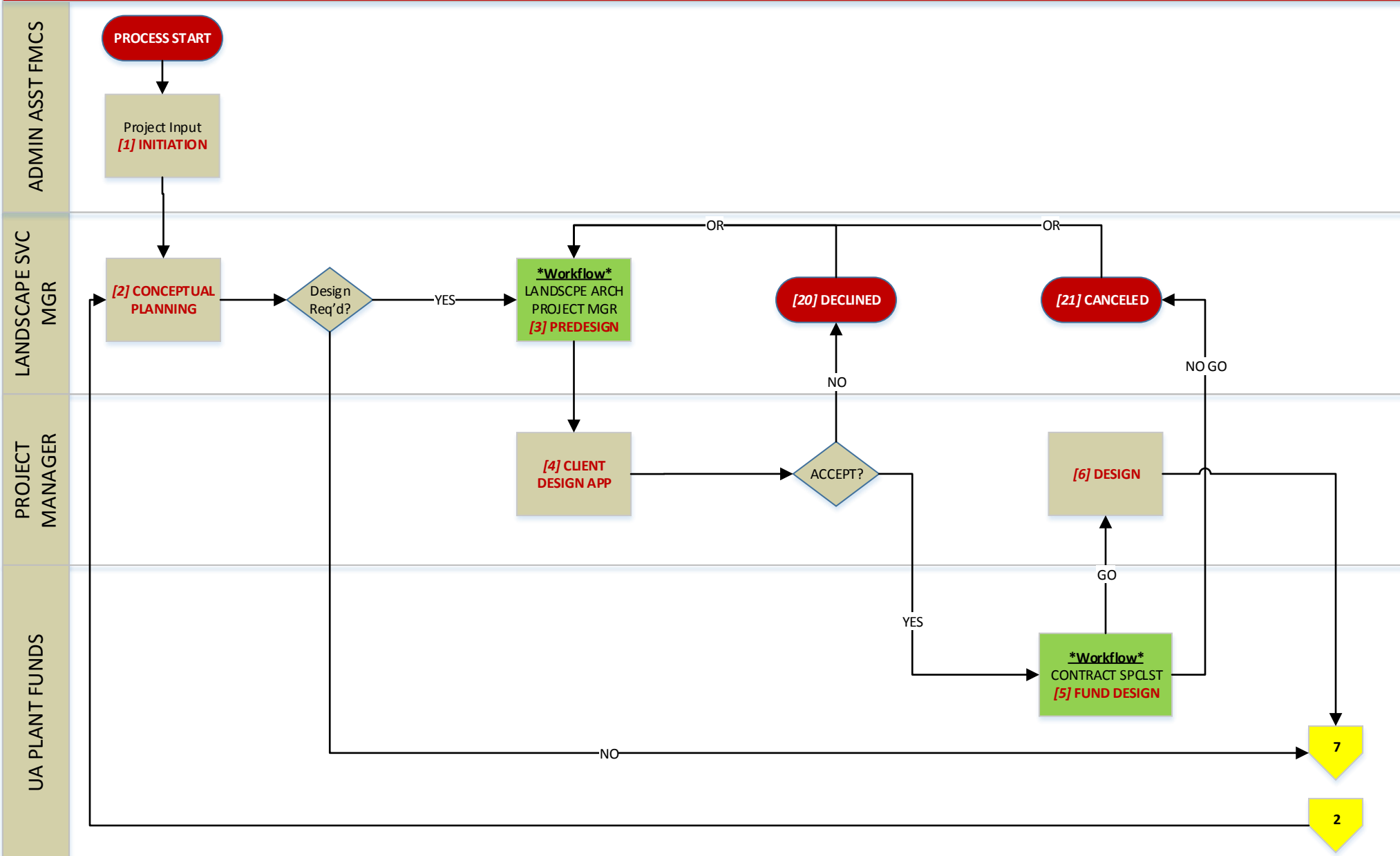
AiM Capital Project Process – Landscape Services (Construction)

Serial Workflow   Parallel Workflow   Informational Workflow

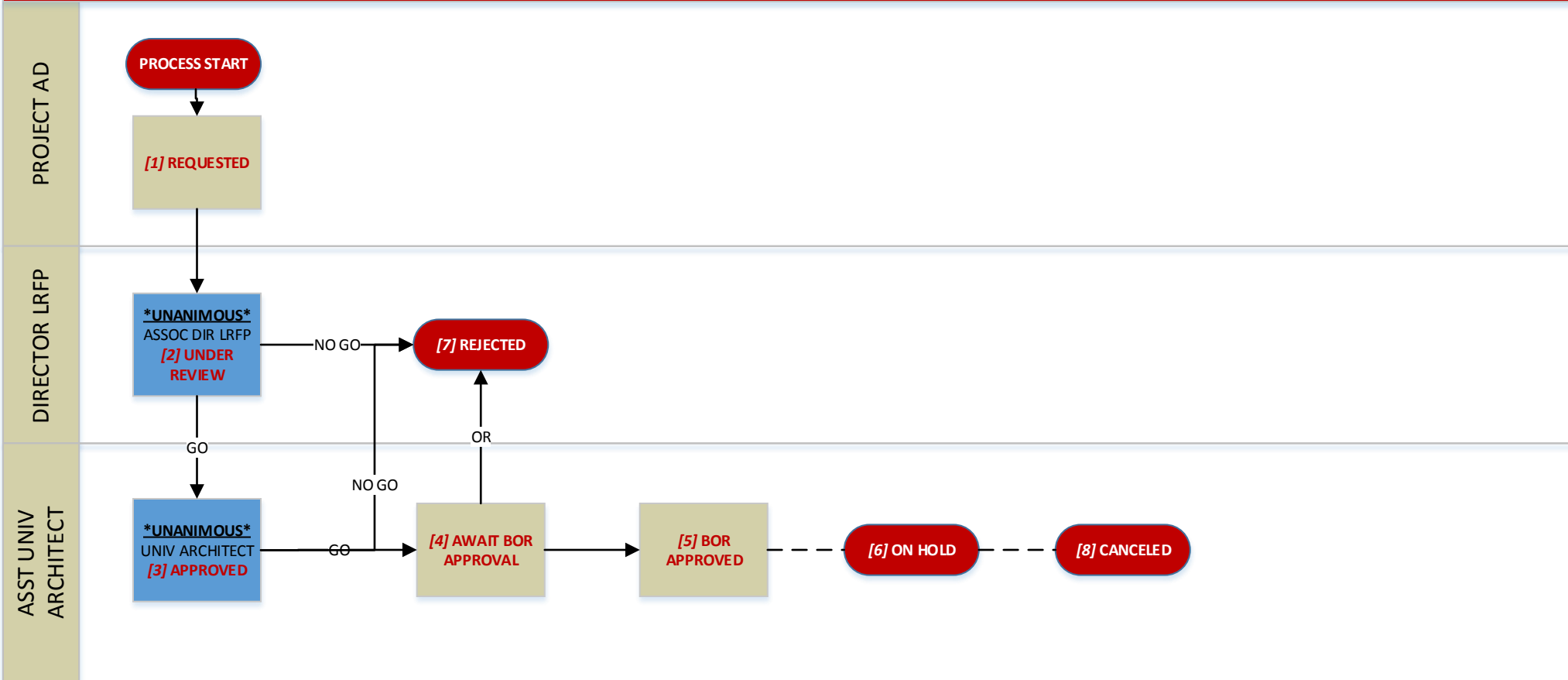Prepared for: Oklahoma State University

PROJECT MANAGER

PROCESS START

7

[7] DEVELOP SOW → [8] SOW APPROVAL → Approved? — NO → (back to Approved path)

Approved? — YES → [9] ESTIMATING

[13] NTP → [14] CONSTRUCTION

If DESIGN is changed, change status to [6] DESIGN

CONTRACT SPECIALIST

Workflow
LAND SVC MGR
DIR FACILITIES
[10] ESTIMATE APPROVAL

[20] DECLINED ← NO GO

Setup Contract
[12] CONTRACT SETUP

UNANIMOUS
PROJECT MANAGER
PREV MAIN SPC
LAND SVC MGR
[15] CONSTR CLOSEOUT

UA PLANT FUNDS

GO

Workflow
[11] FUND CONSTRUCTION

Workflow
FM ACCT
[16] FINANCIAL CLOSEOUT

ADMIN ASST FMCS

[19] ON HOLD --- [18] CLOSED ←

Send Final Closeout Letter
[17] PROJECT CLOSEOUT

AiM Capital Project Process – Interior Design (Design)

Serial Workflow | Parallel Workflow | Informational Workflow

Prepared for: Oklahoma State University

ADMIN ASSOC LRFP

PROCESS START

Project Input
[1] INITIATION

[22] CANCELED

NO GO

Workflow
[3] ASSIGN DESIGN ACCT

[22] DECLINED

NO GO

Workflow
[6] ESTIMATE APPROVAL

Workflow
INTERIOR DESIGNER
[8] PO

INTERIOR DESIGNER

Preconstruction
[2] CONCEPTUAL PLANNING

GO

[4] DESIGN

[5] ESTIMATING

GO

9

UA PLANT FUNDS

Workflow
[7] FUND PROJECT
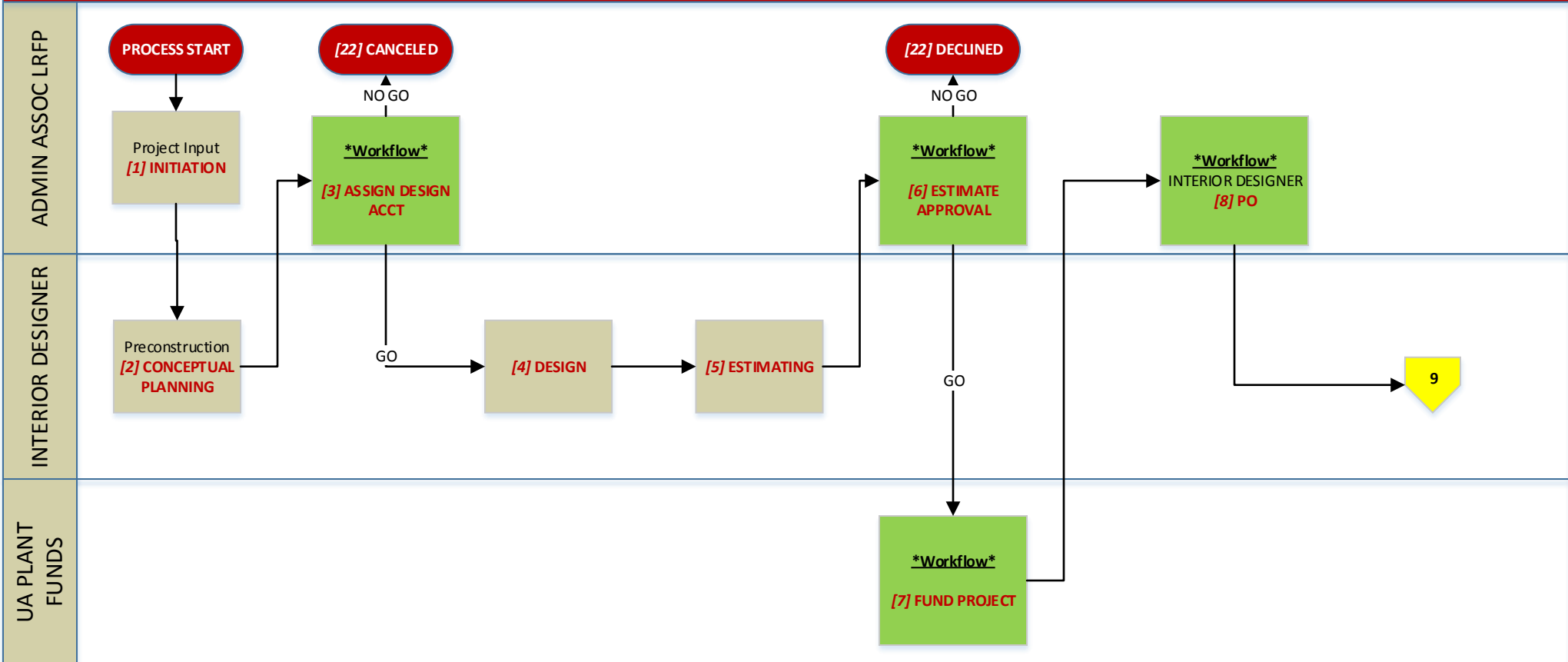
AiM Capital Project Process – Interior Design (Construction)

Legend: Serial Workflow | Parallel Workflow | Informational Workflow

ADMIN ASSOC LRFP

PROCESS START

[10] CONSTRUCTION

UNANIMOUS
INTERIOR DESIGNER
[11] CONSTR CLOSEOUT

[13] PROJECT CLOSEOUT

[14] CLOSED

[15] ON HOLD

[16] DECLINED

[17] CANCELED

INTERIOR DESIGNER

9

Preconstruction
[9] BIDDING

UA PLANT FUNDS

Workflow
ADMIN ASSOC LRFP
[12] FINANCIAL CLOSEOUT
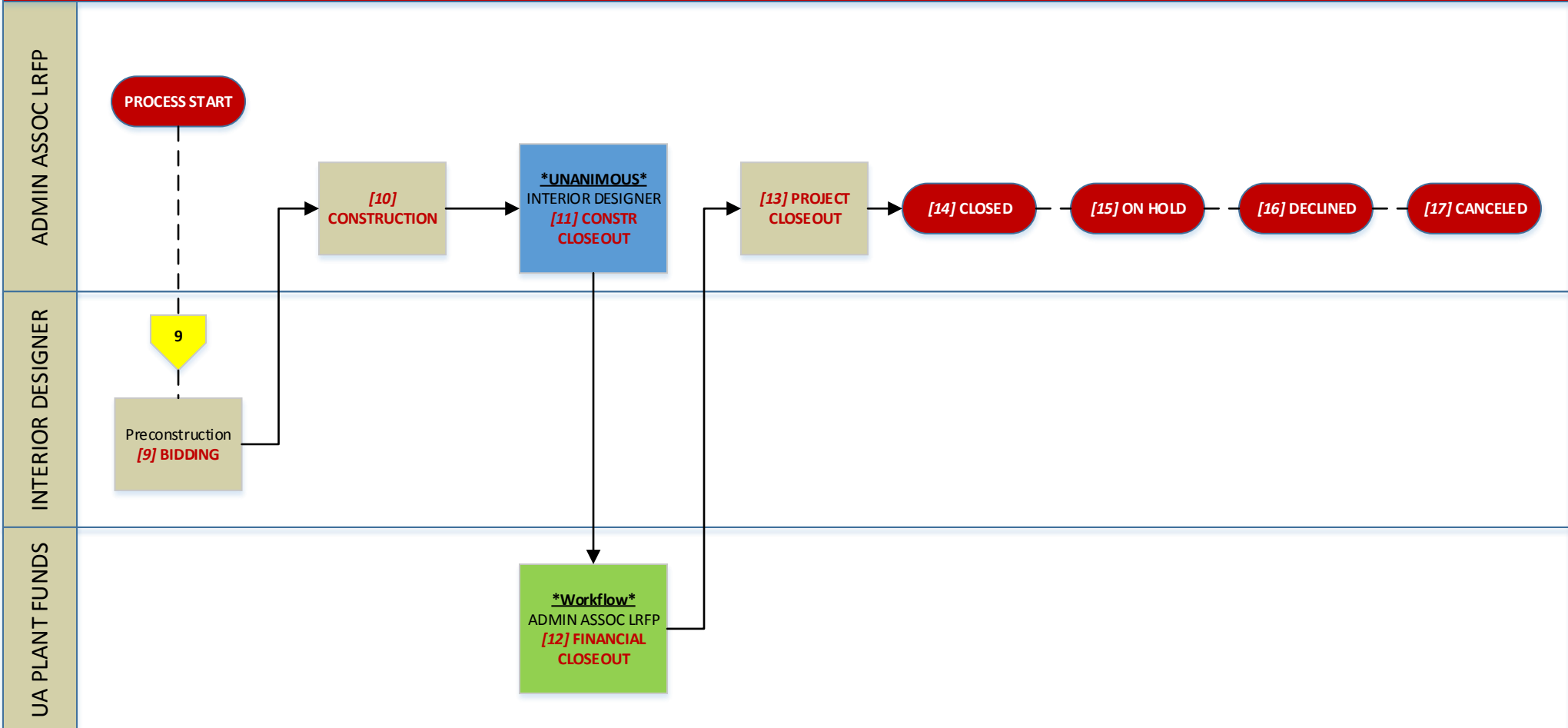
AiM Budget Revision Process – LRFP REQ BOR APPV

Serial Workflow | Parallel Workflow | Informational Workflow

PROJECT AD

PROCESS START

[1] REQUESTED

DIRECTOR LRFP

UNANIMOUS
ASSOC DIR LRFP
[2] UNDER REVIEW

NO GO → *[7]* REJECTED

GO

NO GO

ASST UNIV ARCHITECT

UNANIMOUS
UNIV ARCHITECT
[3] APPROVED

GO → *[4]* AWAIT BOR APPROVAL

OR

[4] AWAIT BOR APPROVAL → *[5]* BOR APPROVED ---- *[6]* ON HOLD ---- *[8]* CANCELED

AiM Budget Revision Process – LRFP Allocation Adjustment

| | Serial Workflow | Parallel Workflow | Informational Workflow |

PROJECT AD

PROCESS START

[1] REQUESTED

DIRECTOR LRFP

First Response
ASSOC DIR LRFP
[2] MANAGEMENT APPROVAL

NO GO → [5] REJECTED

GO → [3] MANAGEMENT APPROVED

[4] ON HOLD

[6] CANCELED
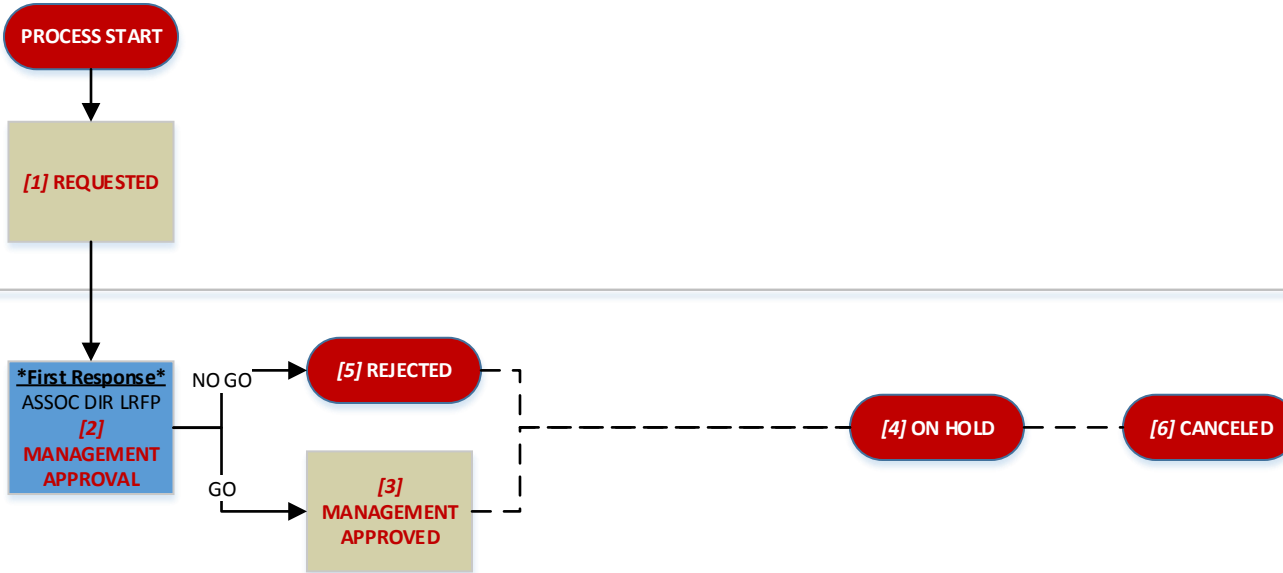
AiM Budget Revision Process – LRFP Budget Deviation

🟩 Serial Workflow	🟦 Parallel Workflow	⬜ Informational Workflow

PROJECT AD

PROCESS START

[1] REQUESTED

DIRECTOR LRFP

First Response
UNIV ARCHITECT
ASST UNIV ARCH
ASSOC DIR LRFP
[2] MANAGEMENT APPROVAL

NO GO → [5] REJECTED

GO → [3] MANAGEMENT APPROVED

[4] ON HOLD

[6] CANCELED
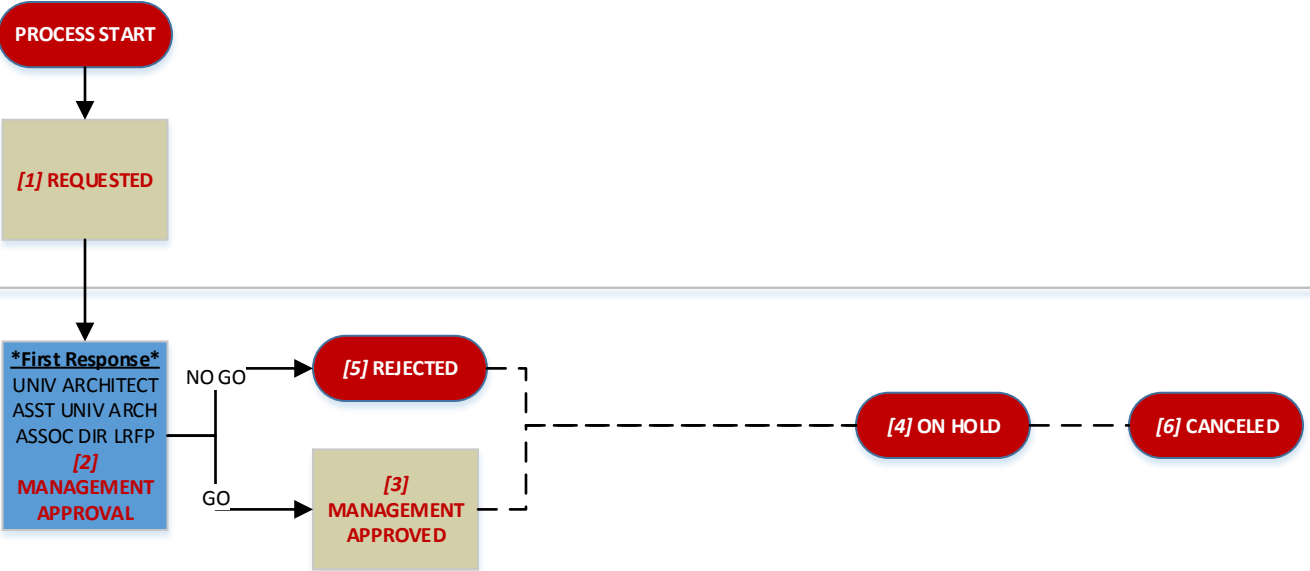
AiM Budget Revision Process – FMCS Above BOR

Serial Workflow   Parallel Workflow   Informational Workflow

PROJECT MANAGER

PROCESS START

[1] REQUESTED

CCS DIRECTOR

UNANIMOUS
CONST TM LEAD
[2] UNDER REVIEW

[7] REJECTED

OR

Workflow
ADM ASST FMCS
CONTR SPCLST
[4] AWAIT BOR APPROVAL

OR

[5] BOR APPROVED

[6] ON HOLD

[8] CANCELED

DIRECTOR FACILITIES

Workflow
[3] APPROVED

NO GO

GO
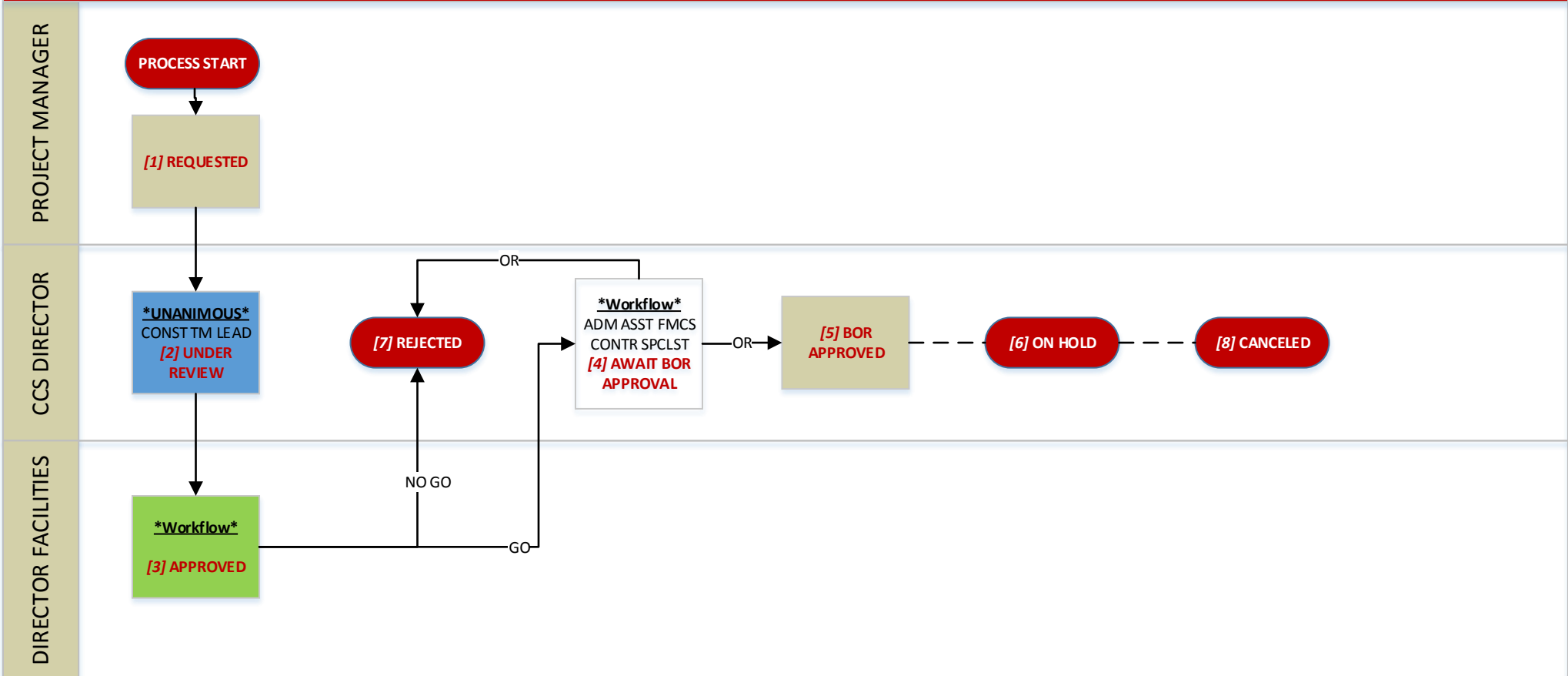
AiM Budget Revision Process – FMCS Allocation Adjustment

Serial Workflow Parallel Workflow Informational Workflow

PROJECT MANAGER

PROCESS START

[1] REQUESTED

CCS DIRECTOR

First Response
CONSTR TM LEAD
[2]
MANAGEMENT
APPROVAL

NO GO → *[5]* REJECTED

GO → *[3]* MANAGEMENT APPROVED

[4] ON HOLD

[6] CANCELED
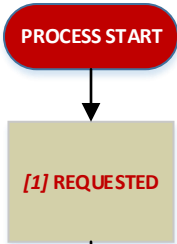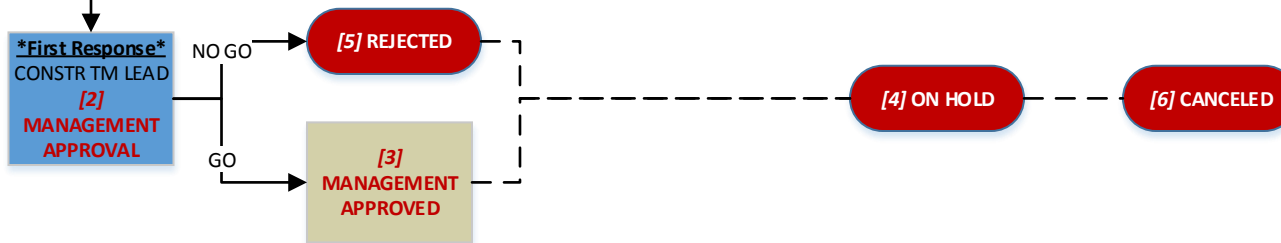
AiM Budget Revision Process – FMCS Budget Deviation

Prepared for: Oklahoma State University

PROJECT MANAGER

PROCESS START

[1] REQUESTED

CCS DIRECTOR

First Response
CONSTR TM LEAD
[2] MANAGEMENT APPROVAL

NO GO → [5] REJECTED

GO → [3] MANAGEMENT APPROVED

[4] ON HOLD

[6] CANCELED
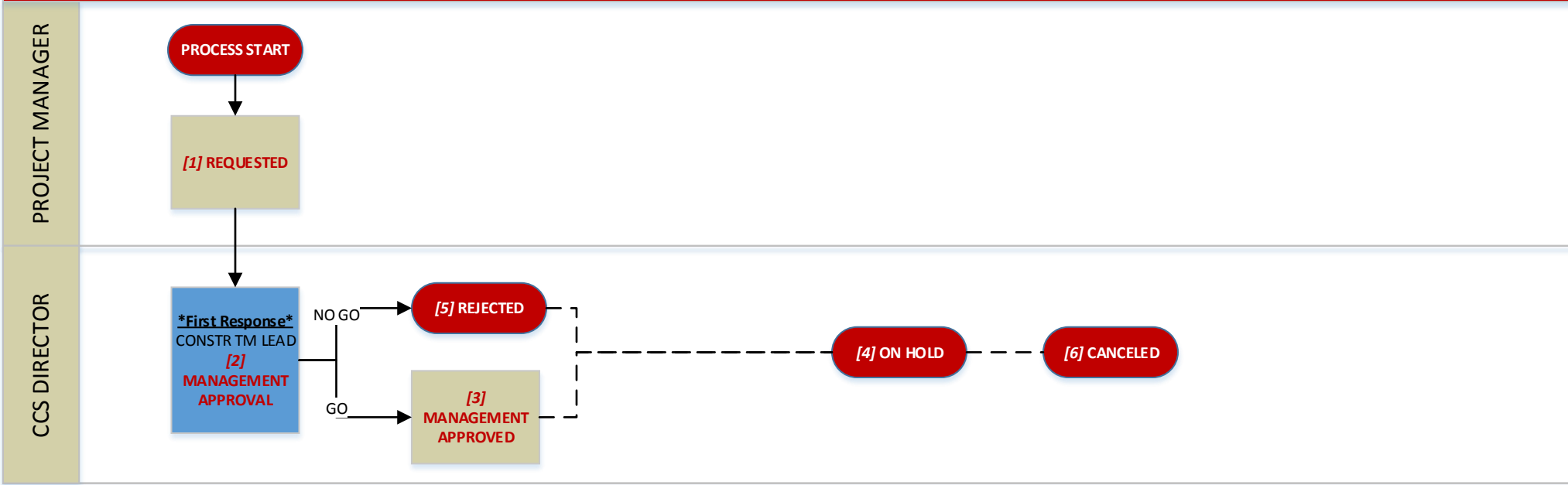
AiM Budget Revision Process – Utilities Above BOR

Serial Workflow · **Parallel Workflow** · **Informational Workflow**

PROJECT MANAGER

PROCESS START

[1] REQUESTED

ENERGY SYS DIRECTOR

UNANIMOUS
DIRECTOR FM
[2] UNDER REVIEW

[7] REJECTED

Workflow
ADM ASST UTIL
[4] AWAIT BOR APPROVAL

[5] BOR APPROVED

[6] ON HOLD

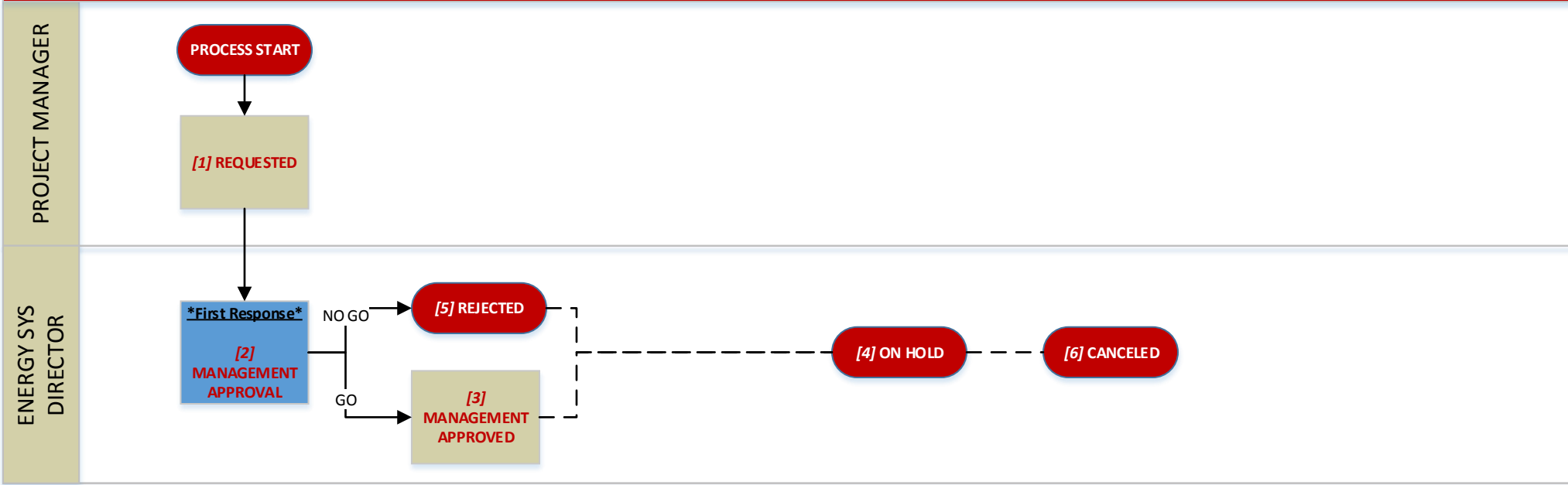[8] CANCELED

OR

OR

DIRECTOR FM

Workflow
[3] APPROVED

NO GO

GO
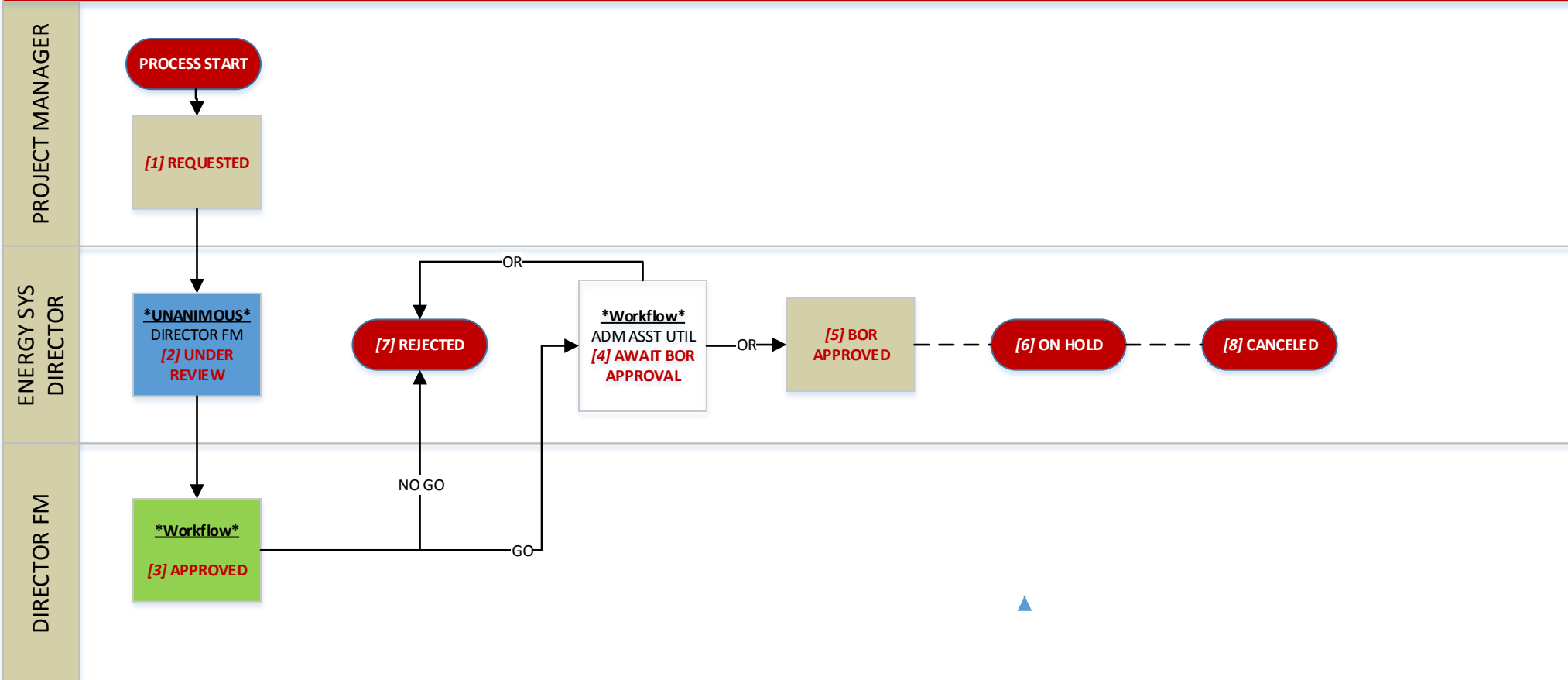
AiM Budget Revision Process – Utilities Allocation Adjustment

Serial Workflow | Parallel Workflow | Informational Workflow

PROJECT MANAGER

PROCESS START

[1] REQUESTED

ENERGY SYS DIRECTOR

First Response

[2] MANAGEMENT APPROVAL

NO GO → [5] REJECTED

GO → [3] MANAGEMENT APPROVED

[4] ON HOLD

[6] CANCELED
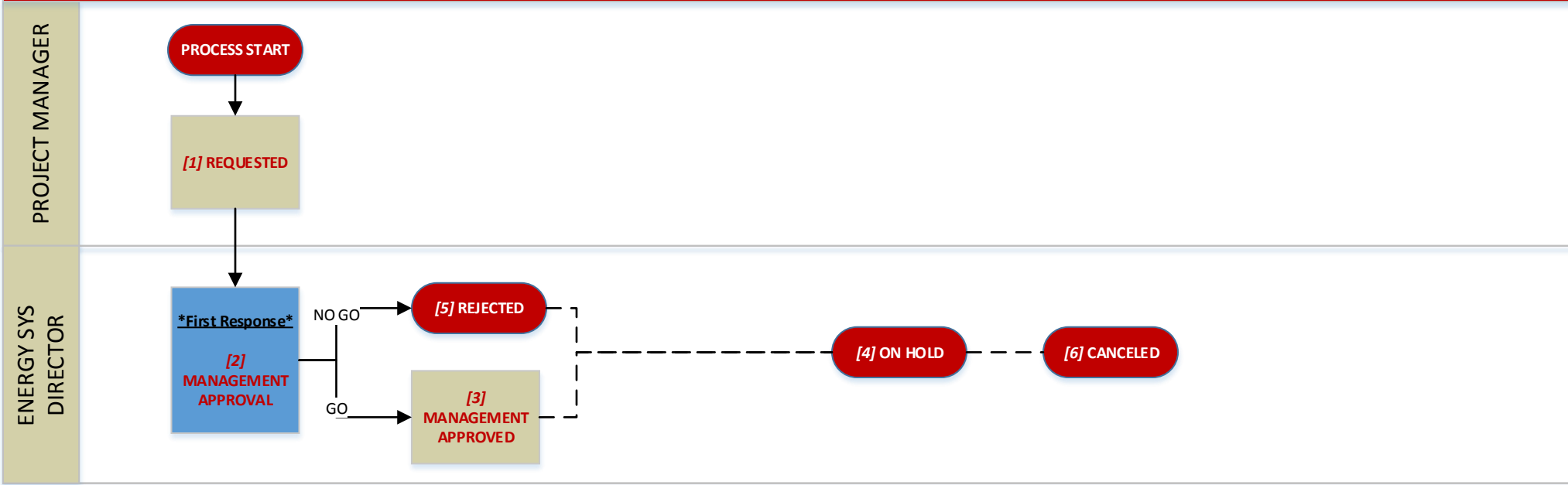
AiM Budget Revision Process – Utilities Budget Deviation

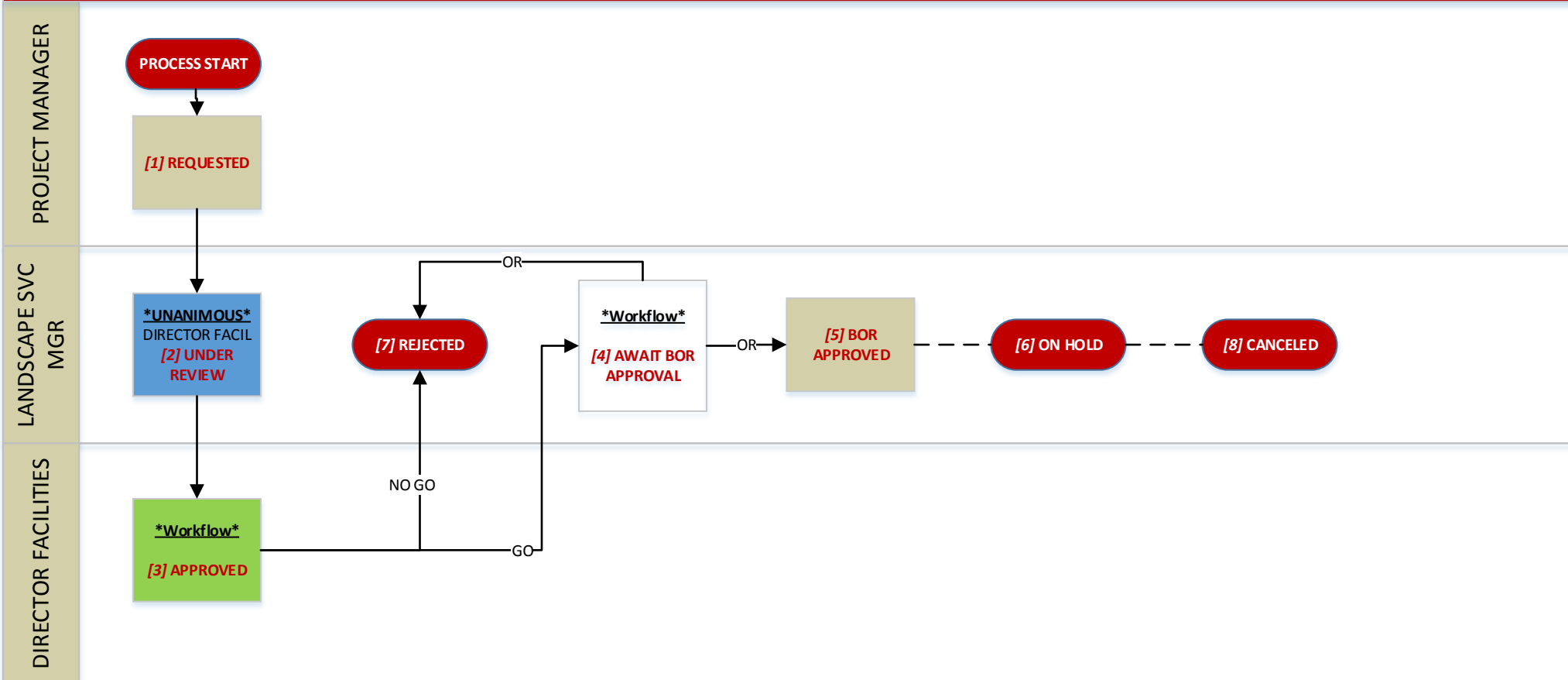Serial Workflow   Parallel Workflow   Informational Workflow

PROJECT MANAGER

PROCESS START

[1] REQUESTED

ENERGY SYS DIRECTOR

First Response

[2] MANAGEMENT APPROVAL

NO GO → *[5]* REJECTED

GO → *[3]* MANAGEMENT APPROVED

[4] ON HOLD

[6] CANCELED

AiM Budget Revision Process – Landscape Above BOR

Serial Workflow	Parallel Workflow	Informational Workflow

PROJECT MANAGER

PROCESS START

[1] REQUESTED

LANDSCAPE SVC MGR

UNANIMOUS DIRECTOR FACIL [2] UNDER REVIEW

OR

[7] REJECTED

Workflow [4] AWAIT BOR APPROVAL

OR

[5] BOR APPROVED

[6] ON HOLD

[8] CANCELED

NO GO

GO

DIRECTOR FACILITIES

Workflow [3] APPROVED

AiM Budget Revision Process – Landscape Allocation Adjustment

Legend:
- Serial Workflow (green)
- Parallel Workflow (blue)
- Informational Workflow (white)

PROJECT MANAGER

PROCESS START

[1] REQUESTED

LANDSCAPE SVC MGR

First Response

[2] MANAGEMENT APPROVAL

NO GO → [5] REJECTED

GO → [3] MANAGEMENT APPROVED

[4] ON HOLD

[6] CANCELED
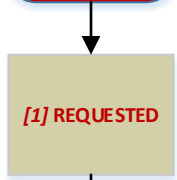
AiM Budget Revision Process – Landscape Budget Deviation

Prepared for: Oklahoma State University

PROJECT MANAGER

PROCESS START

[1] REQUESTED

LANDSCAPE SVC MGR

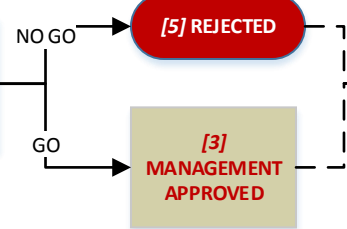*First Response*

[2] MANAGEMENT APPROVAL

NO GO → *[5]* REJECTED

GO → *[3]* MANAGEMENT APPROVED

[4] ON HOLD

[6] CANCELED
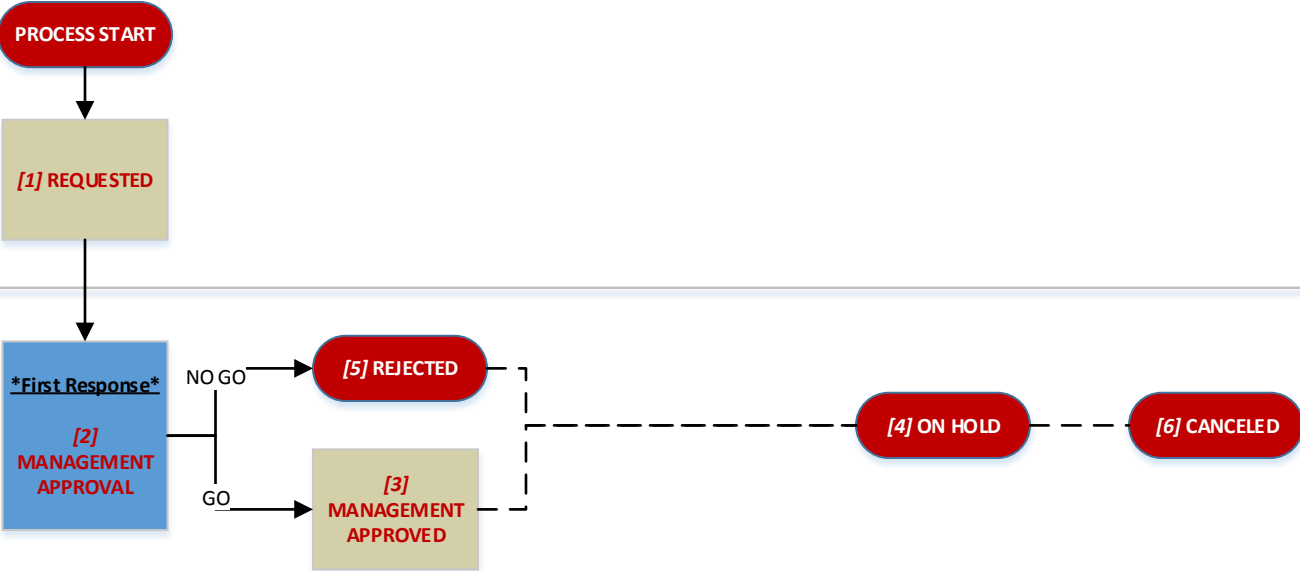
AiM Issues Process – Potential Change Order/Change Directive

PROJECT MANAGER

PROCESS START

[1] INITIATION → [2] PENDING → APPROVE? —YES→ [3] APPROVED

APPROVE? —NO→ [5] REJECTED

[5] REJECTED --- [4] CLOSED --- [6] CANCELED
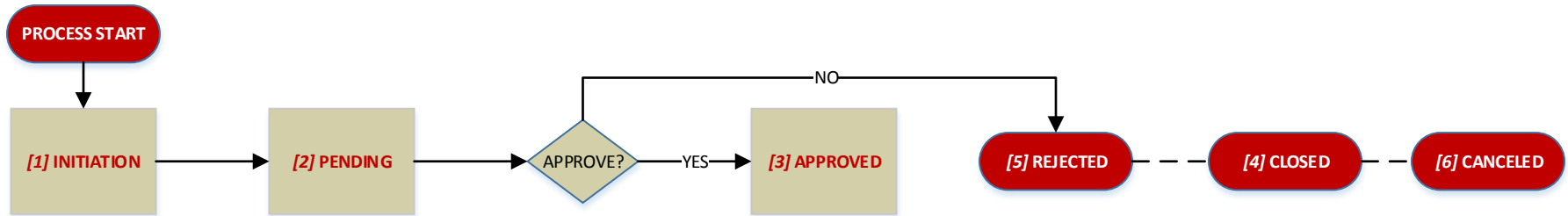
AiM Issues Process – Information Only

PROJECT MANAGER

PROCESS START

[1] REQUESTED

FOLLOW UP?

YES

NO

[2] PENDING

[3] CLOSED

[4] CANCELED
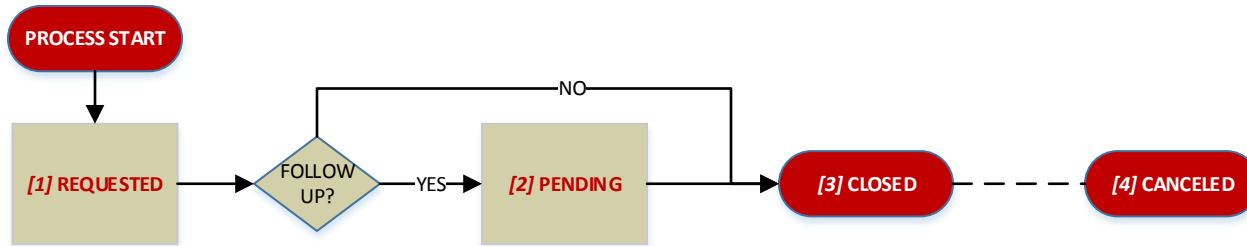
AiM Issues Process – CMAR Contingency

PROJECT MANAGER

PROCESS START

[1] INITIATION

PENDING

OR

PROPOSED

OR

PROPOSED

OR

REJECTED
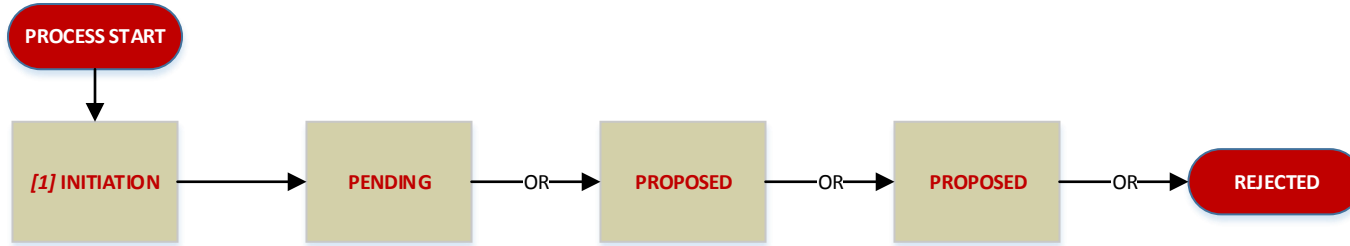
AiM Progress Report Process – All Types

PROJECT MANAGER

PROCESS START

[1] INITIATION → [2] FINALIZED → [3] CLOSED ------ [4] CANCELED
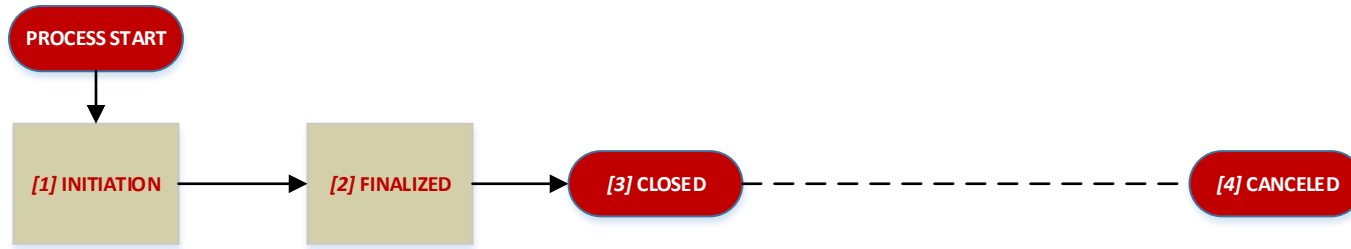
AiM Request for Information Process

PROJECT MANAGER

PROCESS START

[1] OPEN → [2] SUBMITTED → [3] CLOSED - - - - - - - - - - - [4] CANCELED
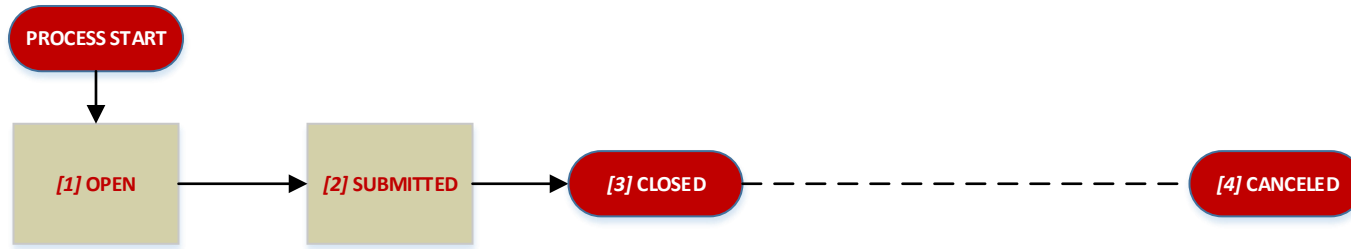
AiM Submittals Process

PROJECT MANAGER

PROCESS START

[1] SUBMITTED → [2] UNDER REVIEW → APPROVED ?

APPROVED ? —YES→ [4] APPROVED

APPROVED ? —NO→ [3] REVISE & RESUBMIT

[4] CANCELED

AiM Consultant Contract Process – LRFP

Serial Workflow Parallel Workflow Informational Workflow

Prepared for: Oklahoma State University

ADMIN ASST LRFP

- PROCESS START
- Contract Input **[1] REQUESTED**
- **[5] GENERATE CONTRACT**
- *Workflow* PROJECT AD ASSOC DIR LRFP **[6] REVIEW CONTRACT**
- *Workflow* ASSOC DIR LRFP **[8] LEGAL APPROVED**
- **[9] AWAIT CONSULT SIG**
- Marked?
- NO GO

PROJECT AD

- NO GO
- *Workflow* **[2] REQUEST PROPOSAL**
- GO
- **[3] AWAIT PROPOSAL**
- GO
- NO
- YES

ASSOC DIR LRFP

- NO GO – ADD NOTE
- *UNANIMOUS* LRFP DIRECTOR **[4] UNDER REVIEW**
- GO
- NO GO
- GO
- GO
- NO
- Approve ?
- *Workflow* **[10] MARKUP REVIEW**

REGENTS LEGAL

- *Workflow* **[7] LEGAL REVIEW**
- YES
- **[16] CANCELED**
- **[15] ON HOLD**

ADMIN ASSOC LRFP

- *Workflow* ASSOC DIR LRFP ADM ASST LRFP **[11] EXECUTE CONTRACT**
- **[12] AWAITING PO**
- *Workflow* ASSOC DIR LRFP PROJECT AD PROJECT MGR **[13] AWARDED**
- **[14] COMPLETED**

AiM Consultant Contract Process – Utilities

Serial Workflow | Parallel Workflow | Informational Workflow

Prepared for: Oklahoma State University

ADMIN ASST UTILITIES

PROCESS START

Contract Input
[1] REQUESTED

[5] GENERATE CONTRACT

Workflow
ENERGY SYS DIR
[6] REVIEW CONTRACT

Workflow
ENERGY SYS DIR
[8] LEGAL APPROVED

[9] AWAIT CONSULT SIG

Marked?

NO GO

ENERGY SYS DIR

Workflow
[2] REQUEST PROPOSAL

[3] AWAIT PROPOSAL

NO GO

GO

GO

NO

NO

Approve ?

YES

Workflow
[10] MARKUP REVIEW

DIRECTOR FM

NO GO – ADD NOTE

UNANIMOUS
ENERGY SYS DIR
[4] UNDER REVIEW

GO

NO GO

GO

REGENTS LEGAL

Workflow
[7] LEGAL REVIEW

YES

[16] CANCELED

[15] ON HOLD

CONTRACT SPECIALIST

Workflow
ENERGY SYS DIR
ADMIN ASST UTIL
[11] EXECUTE CONTRACT

[12] AWAITING PO

Workflow
ENERGY SYS DIR
PROJECT MGR
[13] AWARDED

[14] COMPLETED

AiM Consultant Contract Process – On Call LRFP

Prepared for: Oklahoma State University

ADMIN ASST LRFP

PROCESS START

Contract Input
[1] REQUESTED

Generate Task Order
[4] GENERATE TO

Workflow
PROJECT AD ASSOC DIR LRFP
[5] REVIEW TO

[6] AWAIT CONSULT SIG

NO GO

GO

PROJECT AD

NO GO

Workflow
[2] REQUEST PROPOSAL

ASSOC DIR LRFP

GO   NO GO   GO

Workflow
DIRECTOR LRFP
[3] REVIEW PROPOSAL

[12] CANCELED

[11] ON HOLD

ADMIN ASSOC LRFP

Execute Task Order
[7] EXECUTE TO

[8] AWAITING PO

Workflow
ASSOC DIR LRFP
PROJECT AD
PROJECT MGR
[9] AWARDED

[10] COMPLETED

AiM Consultant Contract Process – On Call Landscape

Serial Workflow Parallel Workflow Informational Workflow

CONTRACT SPECIALIST

PROCESS START

Contract Input
[1] REQUESTED

Generate Task
Order
[3] GENERATE TO

NO GO

Workflow
PROJECT MGR
[4] REVIEW TO

[5] AWAIT
CONSULT SIG

Execute Task
Order
[6] EXECUTE TO

[7] AWAITING
PO

Workflow
PROJECT MGR
[8] AWARDED

LANDSCAPE SERVICE MANAGER

NO GO

GO

Workflow
LANDS ARCH
[2] REVIEW
PROPOSAL

Before the CONTRACT SPECIALIST enters the data into AiM, the **PROJECT MANAGER** will be reviewing the requested proposal for approval. The **PROJECT MANAGER** will be interfacing with the client under the project process.

[9] COMPLETED

[10] ON HOLD

[11] CANCELED

AiM Consultant Contract Process – On Call FMCS

| Serial Workflow | Parallel Workflow | Informational Workflow |

PROJECT MANAGER

PROCESS START

Contract Input
[1] REQUESTED

Before the CONTRACT SPECIALIST enters the data into AiM, the **PROJECT MANAGER** will be reviewing the requested proposal for approval. The **PROJECT MANAGER** will be interfacing with the client under the project process, and will ultimately change the status in AiM.

CONTRACT SPECIALIST

NO GO

NO GO

Generate Task Order
[3] GENERATE TO

Workflow
PROJECT MGR
[4] REVIEW TO

[5] AWAIT CONSULT SIG

Execute Task Order
[6] EXECUTE T0

[7] AWAITING PO

Workflow
PROJECT MGR
[8] AWARDED

CONST TEAM LEADER

GO

Workflow
[2] REVIEW PROPOSAL

[9] COMPLETED

[10] ON HOLD

[11] CANCELED

AiM Consultant Contract Process – On Call Utilities

Serial Workflow   Parallel Workflow   Informational Workflow

PROJECT MANAGER

PROCESS START

[1] REQUEST PROPOSAL

ENERGY SYS DIRECTOR

Workflow
DIRECTOR LRFP
[2] REVIEW PROPOSAL

NO GO

ADMIN ASST UTILITIES

GO

Generate Task Order
[3] GENERATE TO

Workflow
PROJECT MGR
ENERGY SYS DIR
[4] REVIEW TO

[5] AWAIT CONSULT SIG

NO GO

[11] CANCELED

[10] ON HOLD

CONTRACT SPECIALIST

Execute Task Order
[6] EXECUTE TO

[7] AWAITING PO

Workflow
ENERGY SYS DIR
PROJECT MGR
ADMIN ASST UTIL
[8] AWARDED

[9] COMPLETED

AiM Consultant Contract Amendment Process

Prepared for: Oklahoma State University

Legend:
- Serial Workflow (green)
- Parallel Workflow (blue)
- Informational Workflow (white)

ADMIN ASSOC LRFP / CONTRACT SPCLST

- PROCESS START
- Amendment Entry *[1] OPEN*
- PROJECT TYPE?
- *UNANIMOUS* PROJECT MGR *[6] LRFP APPROVED*
- *UNANIMOUS* PROJECT MGR *[7] FM APPROVED*
- *[8] PROCESSED*
- *[10] CANCELED*

DIRECTOR LRFP

- LRFP
- *Workflow* PROJECT MGR PROJECT AD ASSOC DIR LRFP *[2] LRFP UNDER REVIEW*
- NO GO → *[9] DENIED*
- OR GO

CCS DIRECTOR

- FMCS
- *Workflow* PROJECT MGR CONST TM LEAD *[3] FMCS UNDER REVIEW*
- NO GO → *[9] DENIED*
- OR GO

DIRECTOR FACILITIES

- LAND
- *Workflow* PROJECT MGR LAND SVC MGR *[4] LAND UNDER REVIEW*
- NO GO
- UTILITY

DIRECTOR FM

- *Workflow* PROJECT MGR ENERGY SYS DIR *[5] UTIL UNDER REVIEW*
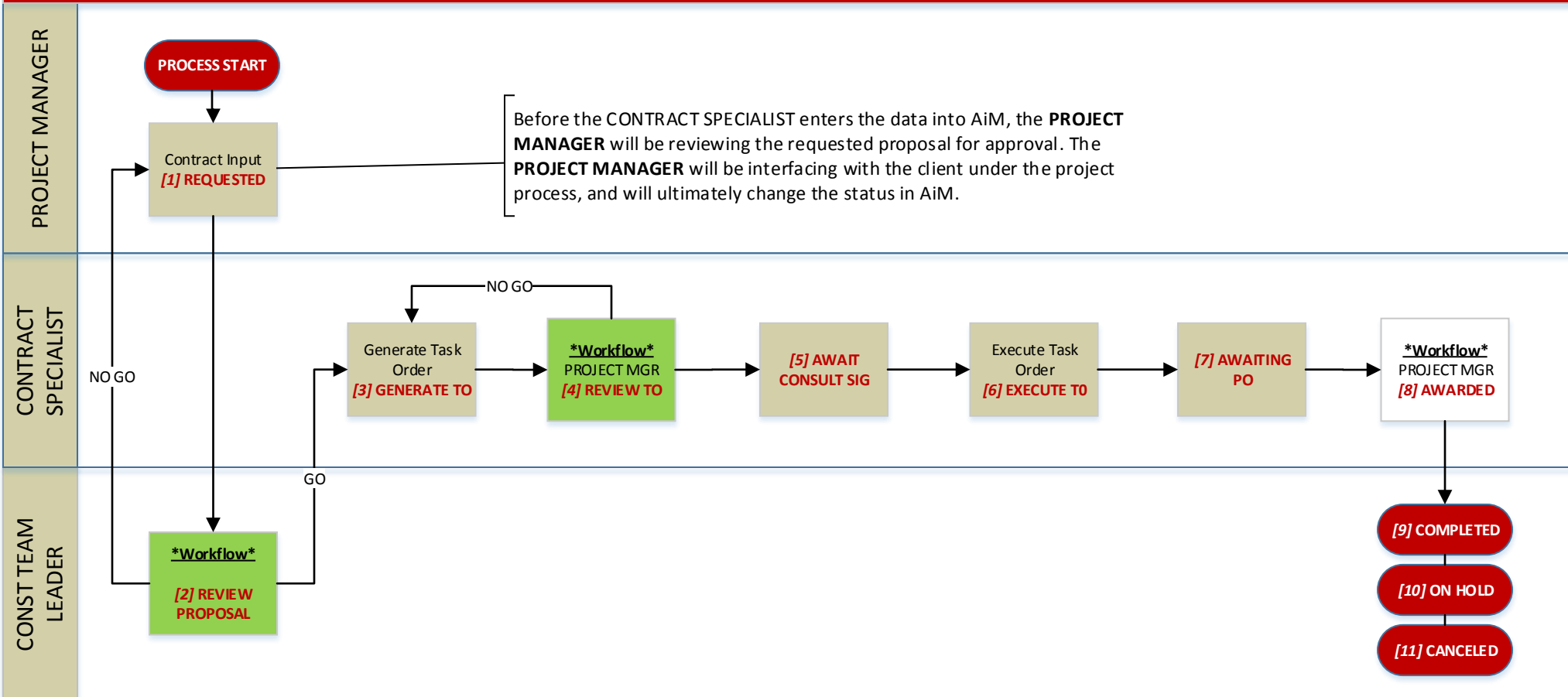- NO GO

AiM Construction Contract Process – CMAR LRFP

Serial Workflow | Parallel Workflow | Informational Workflow
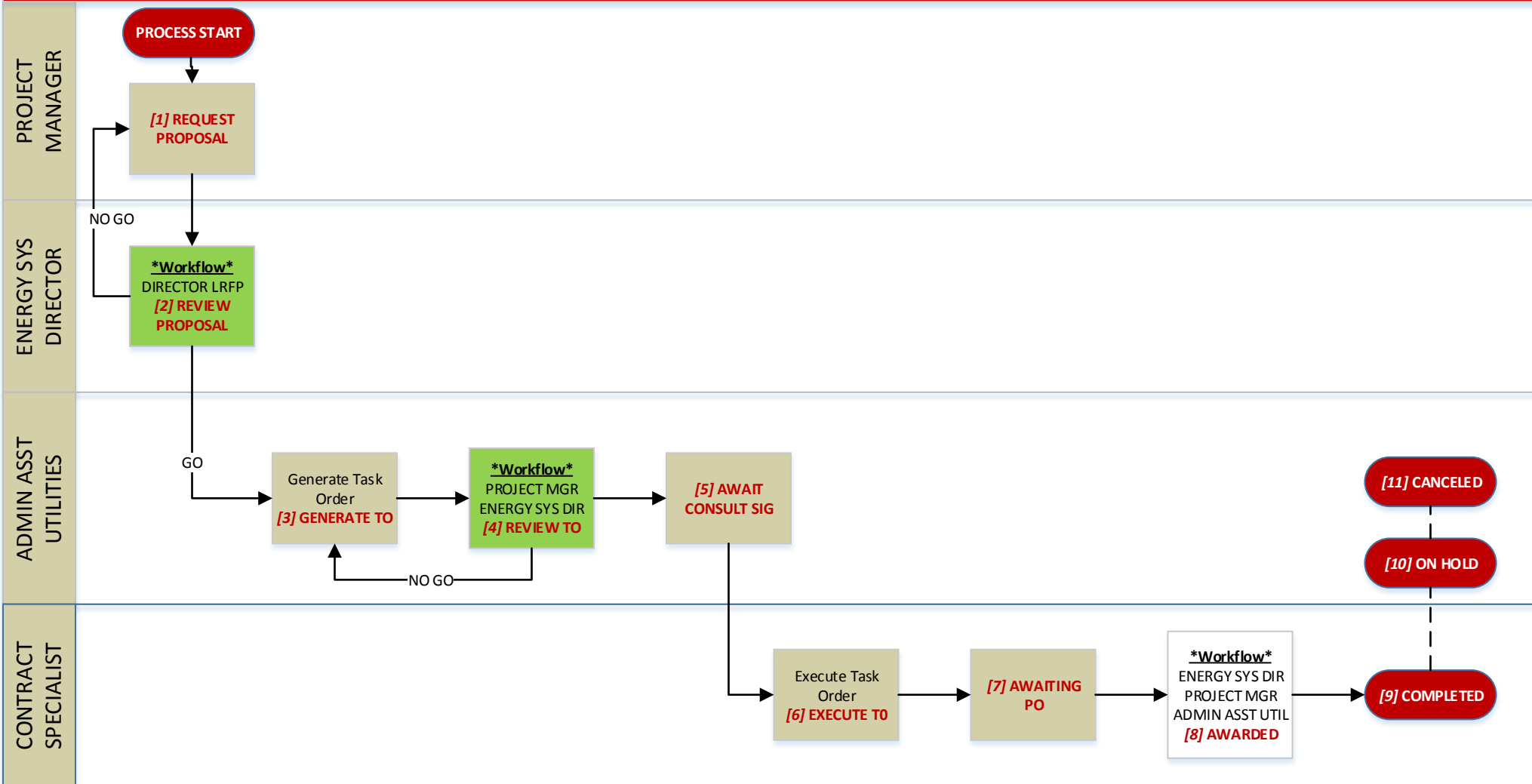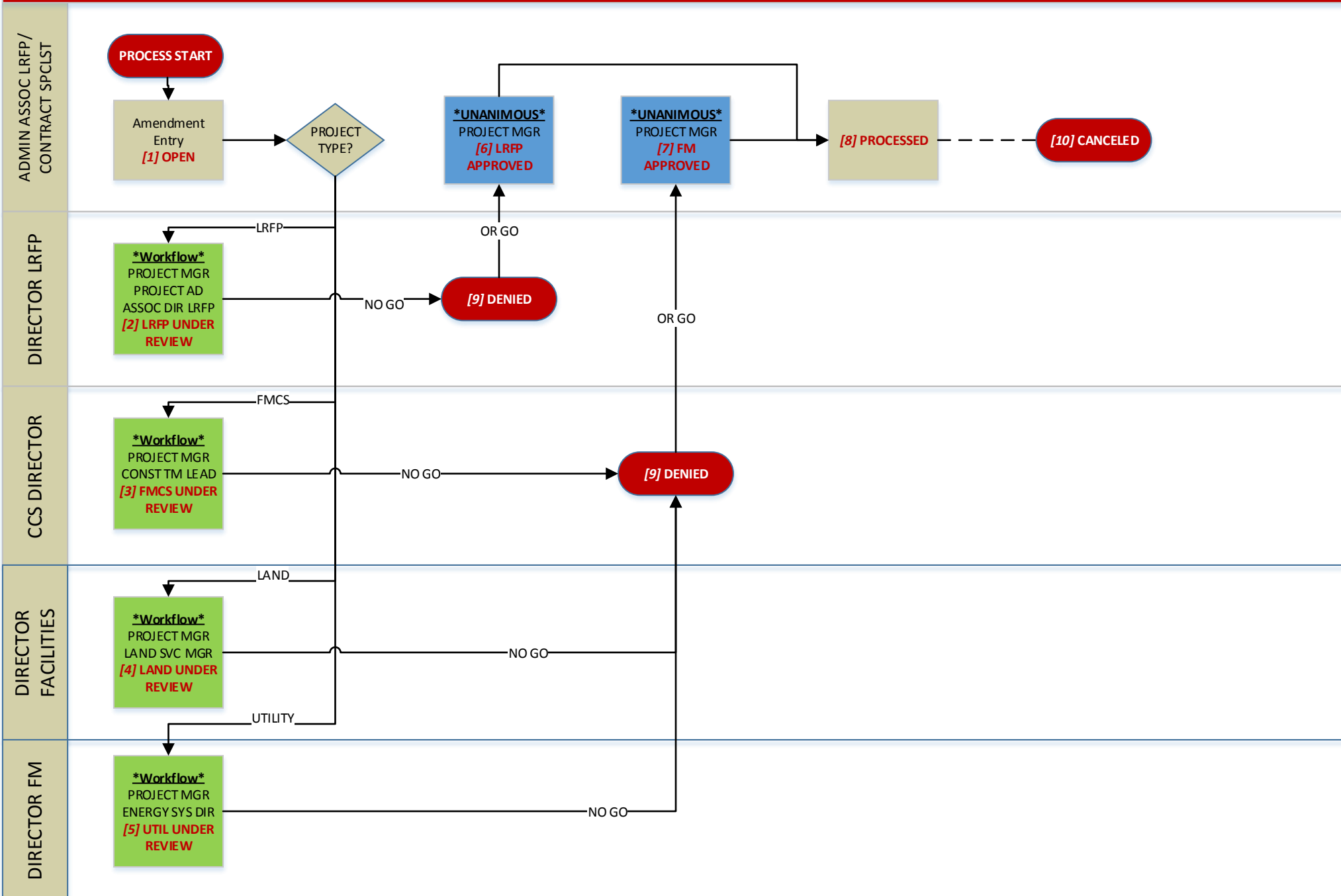
Prepared for: Oklahoma State University

ADMIN ASST LRFP

PROCESS START

Contract Input
[1] REQUESTED

[5] GENERATE CONTRACT

Workflow
PROJECT AD
ASSOC DIR LRFP
[6] REVIEW CONTRACT

Workflow
ASSOC DIR LRFP
[8] LEGAL APPROVED

[9] AWAIT CONTRACTOR SIG

Marked?

NO GO

PROJECT AD

NO GO

Workflow
[2] REQUEST PROPOSAL

GO

[3] AWAIT PROPOSAL

GO

NO GO

YES

NO

ASSOC DIR LRFP

NO GO – ADD NOTE

UNANIMOUS
DIRECTOR LRFP
[4] UNDER REVIEW

NO GO

NO

Approve ?

Workflow
[10] MARKUP REVIEW

REGENTS LEGAL

[17] CANCELED

[16] ON HOLD

[15] COMPLETED

Workflow
[7] LEGAL REVIEW

YES

ADMIN ASSOC LRFP

Workflow
ASSOC DIR LRFP
ADM ASST LRFP
[11] EXECUTE CONTRACT

[12] AWAITING PO

Workflow
ASSOC DIR LRFP
PROJECT AD
PROJECT MGR
[13] AWARDED

[14] NTP

AiM Construction Contract Process – LRFP Hard Bid

Serial Workflow	Parallel Workflow

Informational Workflow

Prepared for: Oklahoma State University

ADMIN ASST LRFP

PROCESS START

Contract Input
[1] REQUESTED

NO GO

[6] GENERATE CONTRACT

Workflow
PROJECT AD
ASSOC DIR LRFP
[7] REVIEW CONTRACT

Workflow
ASSOC DIR LRFP
[9] LEGAL APPROVED

[10] AWAIT CONTRACTOR SIG

Marked?

PROJECT AD

Workflow
PROJECT MGR
[2] READY TO ADVERTISE

PROJECT MANAGER

Workflow
[3] ADVERTISE

Workflow
ADM ASST LRFP
[4] BID OPENING

GO

GO

NO

YES

[18] CANCELED

ASSOC DIR LRFP / REGENTS LEGAL

NO GO

UNANIMOUS
PROJECT AD
DIRECTOR LRFP
[5] UNDER REVIEW

NO GO

GO

Workflow
[8] LEGAL REVIEW

YES

Approve ?

Workflow
[11] MARKUP REVIEW

[17] ON HOLD

[16] COMPLETED

NO

ADMIN ASSOC LRFP

Workflow
ASSOC DIR LRFP
ADM ASST LRFP
[12] EXECUTE CONTRACT

[13] AWAITING PO

Workflow
ASSOC DIR LRFP
PROJECT AD
PROJECT MGR
[14] AWARDED

[15] NTP

AiM Construction Contract Process – FM Low Bid

| | Serial Workflow | Parallel Workflow | Informational Workflow |

CONTRACT SPECIALIST

PROCESS START

Contract Input
[1] REQUESTED

Workflow
[3] ADVERTISE

UNANIMOUS
PROJECT MGR
[5] UNDER REVIEW

GO

[6] AWAITING PO

Workflow
PROJECT MGR
[8] NTP

[9] COMPLETED

[10] ON HOLD

PROJECT MANAGER

First Response
CONTR SPCLST
[2] READY TO ADVERTISE

[4] BID OPENING

NO GO

[7] AWARDED

[11] CANCELED
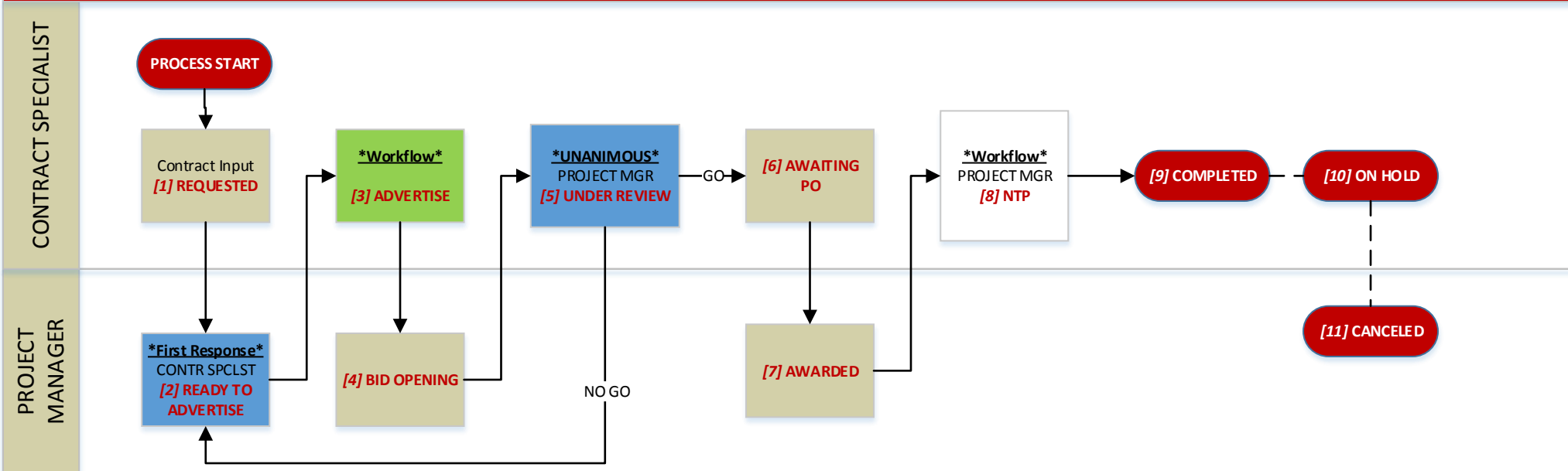
AiM Construction Contract Process – CMAR Utilities

| Serial Workflow | Parallel Workflow | Informational Workflow |

ADMIN ASST UTILITIES

PROCESS START

Contract Input
[1] REQUESTED

[5] GENERATE CONTRACT

Workflow
PROJECT MGR
ENERGY SYS DIR
[6] REVIEW CONTRACT

Workflow
ASSOC DIR LRFP
[8] LEGAL APPROVED

[9] AWAIT CONSULT SIG

Marked?

NO GO

YES

ENERGY SYS DIRECTOR

NO GO

Workflow
[2] REQUEST PROPOSAL

UNANIMOUS
DIRECTOR FM
[4] UNDER REVIEW

GO

GO

NO

NO

Approve ?

Workflow
[10] MARKUP REVIEW

PROJECT MANAGER

[3] AWAIT PROPOSAL

GO

NO GO

REGENTS LEGAL

Workflow
[7] LEGAL REVIEW

YES

[17] CANCELED

[16] ON HOLD

[15] COMPLETED

CONTRACT SPECIALIST

Workflow
ENERGY SYS DIR
ADM ASST UTIL
[11] EXECUTE CONTRACT

[12] AWAITING PO

Workflow
PROJECT MGR
DIRECTOR FM
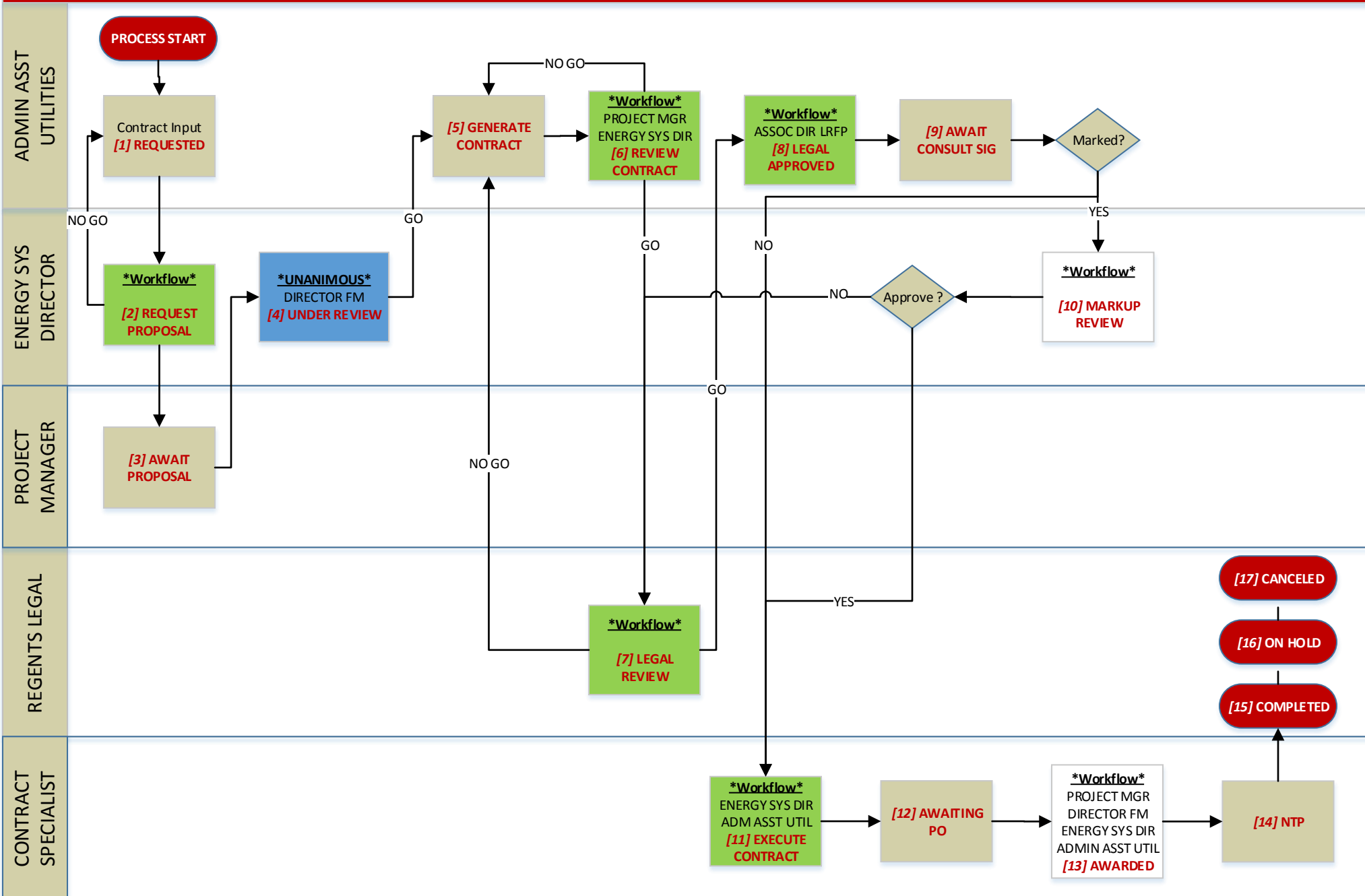ENERGY SYS DIR
ADMIN ASST UTIL
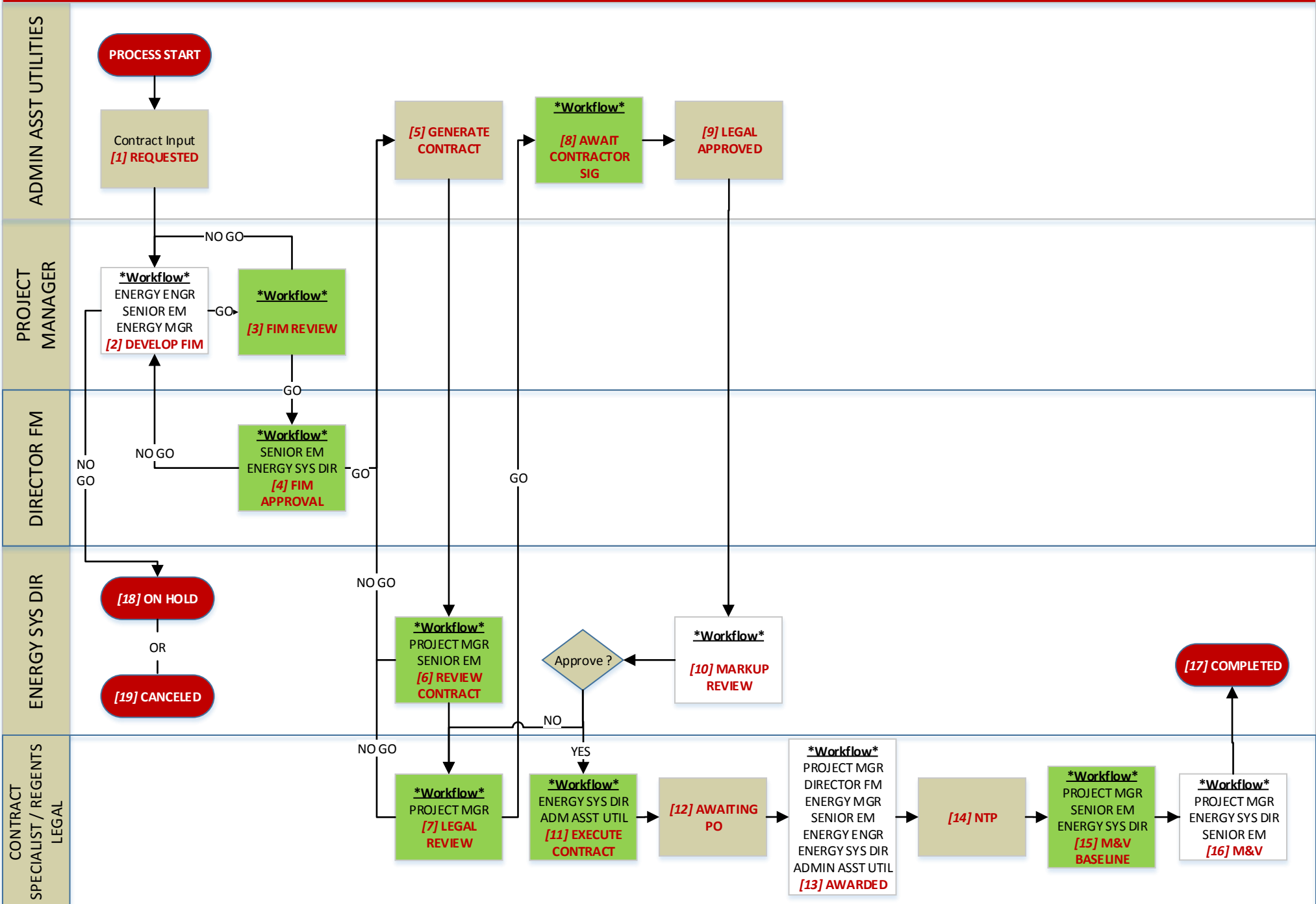*[13]* AWARDED

[14] NTP

AiM Construction Contract Process – Energy SPC

Serial Workflow   Parallel Workflow   Informational Workflow
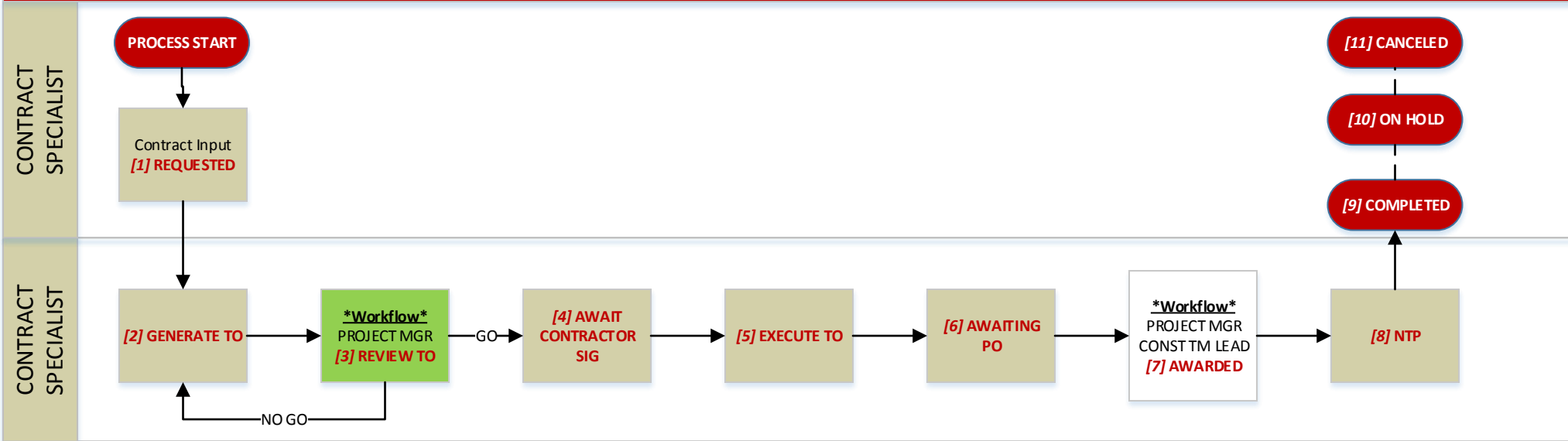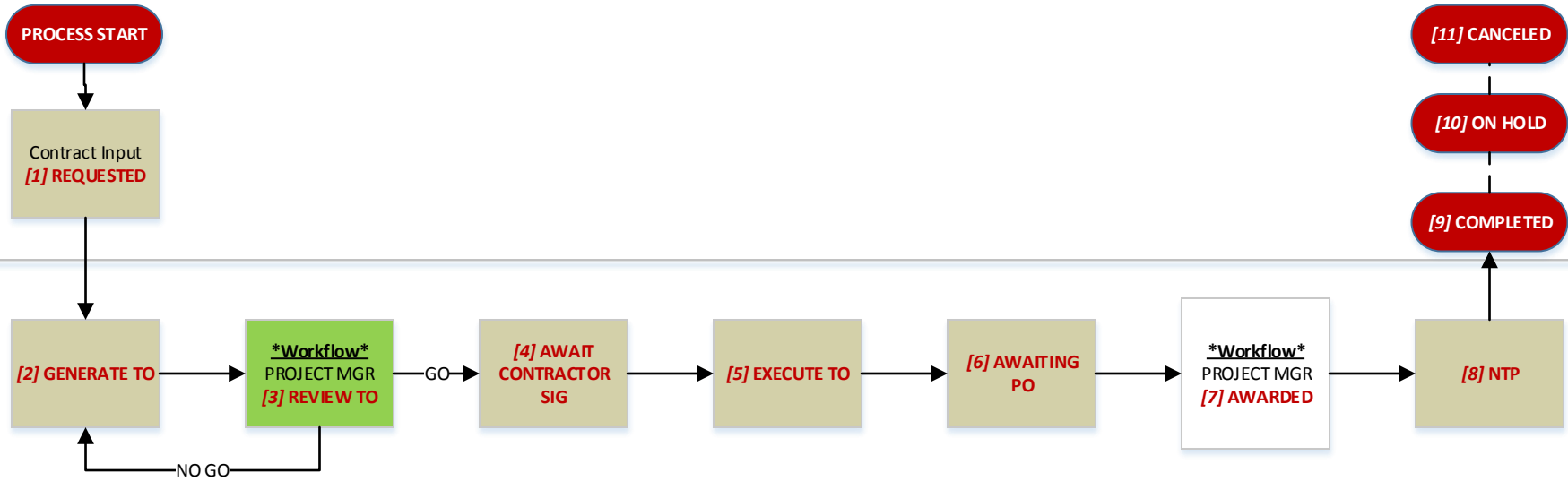
Prepared for: Oklahoma State University

ADMIN ASST UTILITIES

PROCESS START

Contract Input
[1] REQUESTED

[5] GENERATE CONTRACT

Workflow
[8] AWAIT CONTRACTOR SIG

[9] LEGAL APPROVED

PROJECT MANAGER

Workflow
ENERGY ENGR
SENIOR EM
ENERGY MGR
[2] DEVELOP FIM

NO GO

Workflow
[3] FIM REVIEW

GO

DIRECTOR FM

Workflow
SENIOR EM
ENERGY SYS DIR
[4] FIM APPROVAL

GO

NO GO

NO GO

ENERGY SYS DIR

[18] ON HOLD

OR

[19] CANCELED

NO GO

Workflow
PROJECT MGR
SENIOR EM
[6] REVIEW CONTRACT

Approve ?

Workflow
[10] MARKUP REVIEW

[17] COMPLETED

CONTRACT SPECIALIST / REGENTS LEGAL

NO GO

NO

YES

Workflow
PROJECT MGR
[7] LEGAL REVIEW

Workflow
ENERGY SYS DIR
ADM ASST UTIL
[11] EXECUTE CONTRACT

[12] AWAITING PO

Workflow
PROJECT MGR
DIRECTOR FM
ENERGY MGR
SENIOR EM
ENERGY ENGR
ENERGY SYS DIR
ADMIN ASST UTIL
[13] AWARDED

[14] NTP

Workflow
PROJECT MGR
SENIOR EM
ENERGY SYS DIR
[15] M&V BASELINE

Workflow
PROJECT MGR
ENERGY SYS DIR
SENIOR EM
[16] M&V

AiM Construction Contract Process – OCCM

Serial Workflow ■ **Parallel Workflow** ■ **Informational Workflow** □

CONTRACT SPECIALIST

PROCESS START

Contract Input
[1] REQUESTED

[11] CANCELED

[10] ON HOLD

[9] COMPLETED

CONTRACT SPECIALIST

[2] GENERATE TO

Workflow
PROJECT MGR
[3] REVIEW TO

—GO→

[4] AWAIT CONTRACTOR SIG

[5] EXECUTE TO

[6] AWAITING PO

Workflow
PROJECT MGR
CONST TM LEAD
[7] AWARDED

[8] NTP

—NO GO—

AiM Construction Contract Process – As Needed

Serial Workflow   Parallel Workflow   Informational Workflow

CONTRACT SPECIALIST

PROCESS START

Contract Input
[1] REQUESTED

[11] CANCELED

[10] ON HOLD

[9] COMPLETED

CONTRACT SPECIALIST

[2] GENERATE TO

Workflow
PROJECT MGR
[3] REVIEW TO

— GO →

[4] AWAIT CONTRACTOR SIG

[5] EXECUTE TO

[6] AWAITING PO

Workflow
PROJECT MGR
[7] AWARDED

[8] NTP

— NO GO —

AiM Change Proposal Process - LRFP

Serial Workflow Parallel Workflow Informational Workflow

ADMIN ASSOC LRFP

PROCESS START

[1] OPEN

DIRECTOR LRFP

Workflow
PROJECT MGR
PROJECT AD
ASSOC DIR LRFP
[2] UNDER REVIEW

—NO GO→ *[5]* DENIED

GO

PROJECT MANAGER

Workflow
[3] APPROVED

→ *[4]* PROCESSED

- - - - *[6]* CANCELED
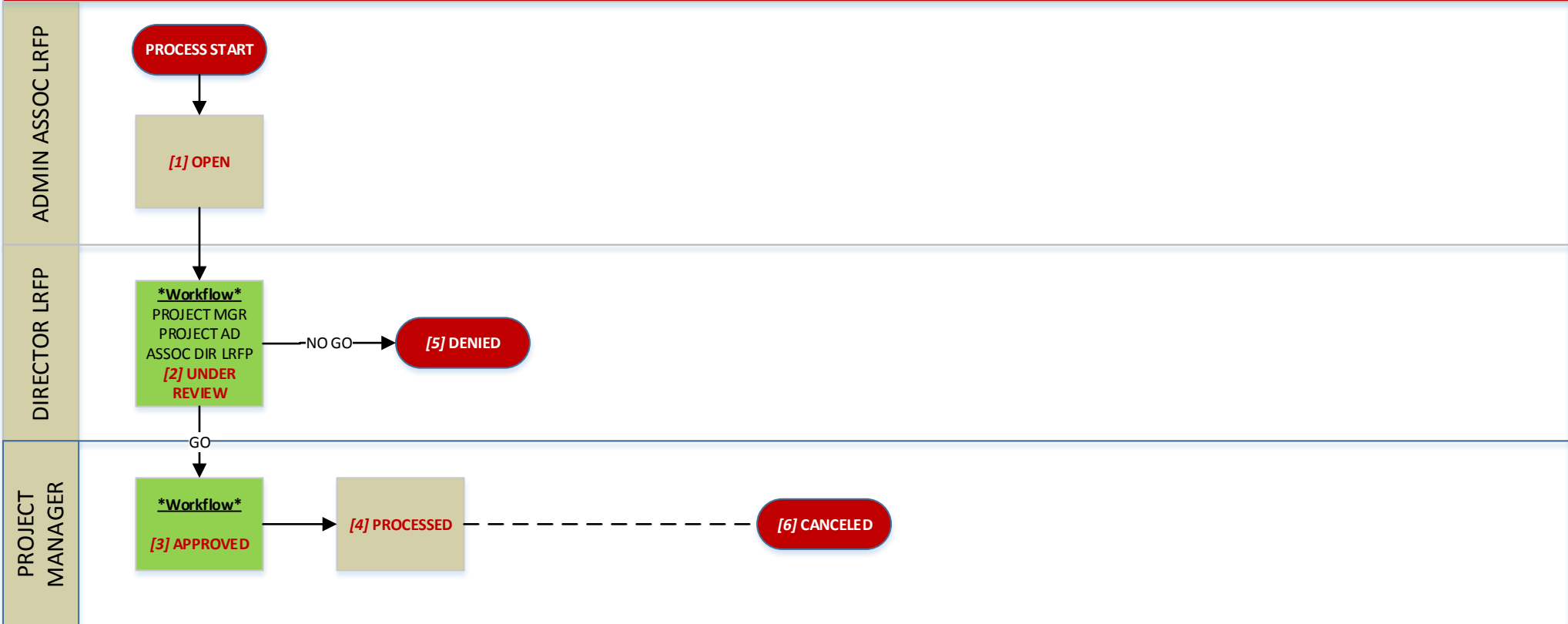
AiM Change Proposal Process - FMCS

Serial Workflow Parallel Workflow Informational Workflow

PROJECT MANAGER

PROCESS START

[1] OPEN

GO

Workflow

[3] APPROVED

[4] PROCESSED

[6] CANCELED

CCS DIRECTOR

Workflow
PROJECT MGR
CNST TEAM LEAD
[2] UNDER REVIEW

NO GO

[5] DENIED
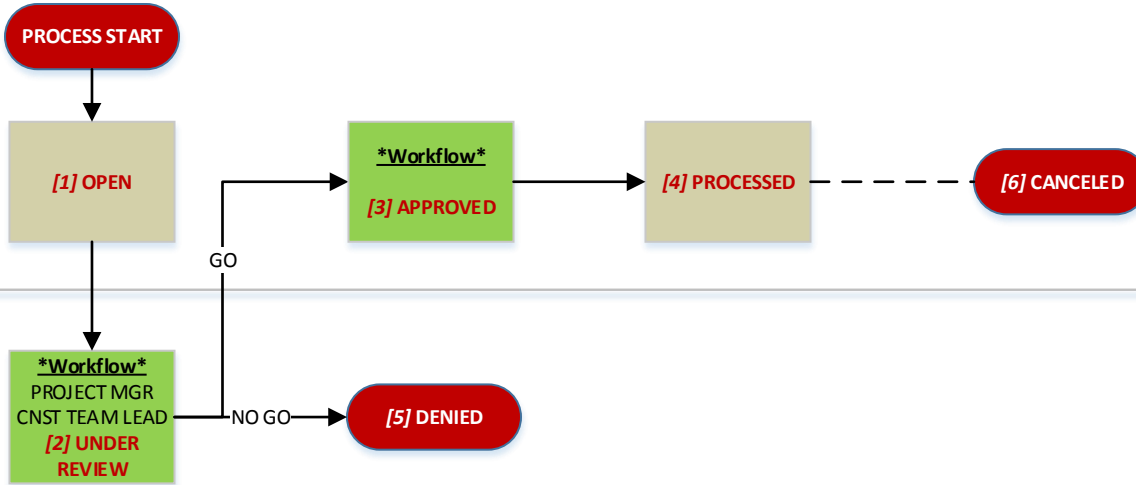
AiM Change Proposal Process – Landscape Services

Serial Workflow | Parallel Workflow | Informational Workflow

PROJECT MANAGER

PROCESS START

[1] OPEN

GO

Workflow

[3] APPROVED

[4] PROCESSED

[6] CANCELED

LANDSCAPE SVC MGR

Workflow
PROJECT MGR
[2] UNDER REVIEW

NO GO

[5] DENIED
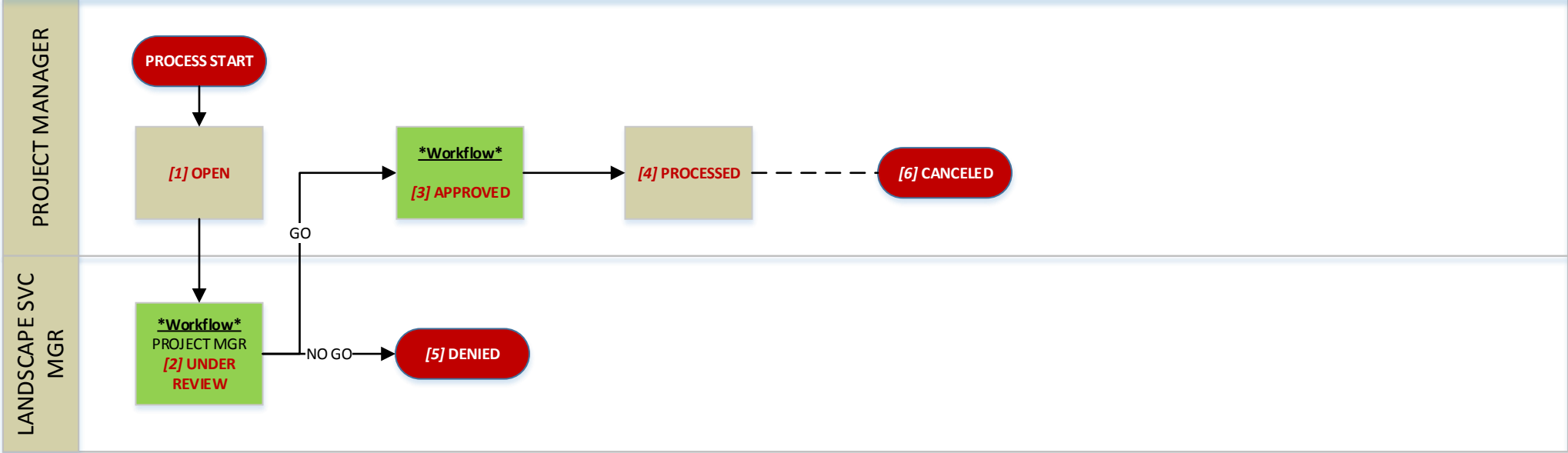
AiM Change Proposal Process – Utilities

Serial Workflow | Parallel Workflow | Informational Workflow

PROJECT MANAGER

PROCESS START

[1] OPEN

Workflow
[3] APPROVED

[4] PROCESSED

[6] CANCELED

GO

ENERGY SYS DIRECTOR

Workflow
PROJECT MGR
[2] UNDER REVIEW

NO GO → [5] DENIED
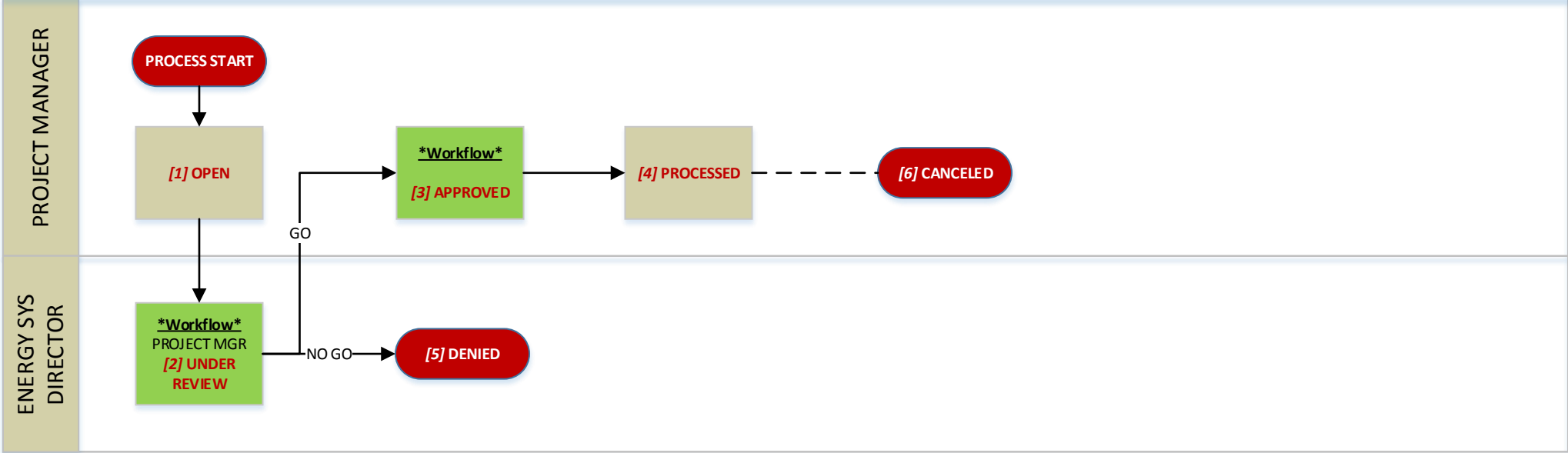
AiM Construction Contract Change Order Process

Serial Workflow   Parallel Workflow   Informational Workflow

ADMIN ASSOC LRFP / CONTRACT SPCLST

PROCESS START

Change Order Entry
[1] OPEN

PROJECT TYPE?

UNANIMOUS
PROJECT MGR
[10] LRFP APPROVED

[13] DENIED

UNANIMOUS
PROJECT MGR
[11] FM APPROVED

[12] PROCESSED

[14] CANCELED

DIRECTOR LRFP

LRFP

Workflow
PROJECT MGR
PROJECT AD
ASSOC DIR LRFP
[2] LRFP UNDER REVIEW

NO GO → *[13] DENIED*

OR GO

Workflow
PROJECT MGR
PROJECT AD
ASSOC DIR LRFP
[9] BOR APPROVAL

NO GO

YES

CCS DIRECTOR

FMCS

Workflow
PROJECT MGR
CONST TM LEAD
[3] FMCS UNDER REVIEW

NO GO → *[13] DENIED* → OR GO → *[6] FMCS PEND APPROVAL*

LRFP APPROVAL?

YES

NO

LANDSCAPE SVC MGR

LAND

Workflow
PROJECT MGR
DIR FACILITIES
[4] LAND UNDER REVIEW

NO GO → *[13] DENIED* → OR GO → *[7] LAND PEND APPROVAL*

LRFP APPROVAL?

YES

NO

UTILITY

ENERGY SYS DIR

Workflow
PROJECT MGR
DIRECTOR FM
[5] UTIL UNDER REVIEW

NO GO → *[13] DENIED* → OR GO → *[8] UTIL PEND APPROVAL*

LRFP APPROVAL?

YES

NO

AiM Internal Work Agreement Process – LRFP

Prepared for: Oklahoma State University

PROJECT MANAGER

PROCESS START

IWA Input
[1] REQUESTED

[2] UNDER REVIEW

__*Workflow*__
[4] ESTIMATE APPROVAL

[9] CANCELED

ADMIN ASSOC LRFP

NO GO

GO

[3] ESTIMATING

[5] APPROVED

[6] NTP

[7] COMPLETED

[8] ON HOLD

AiM Internal Work Agreement Process – All FM Types

Prepared for: Oklahoma State University

PROJECT MANAGER

PROCESS START

IWA Input
[1] REQUESTED

[2] UNDER REVIEW

[3] APPROVED

[7] CANCELED

(SEE BELOW)

[4] NTP

[5] COMPLETED

[6] ON HOLD
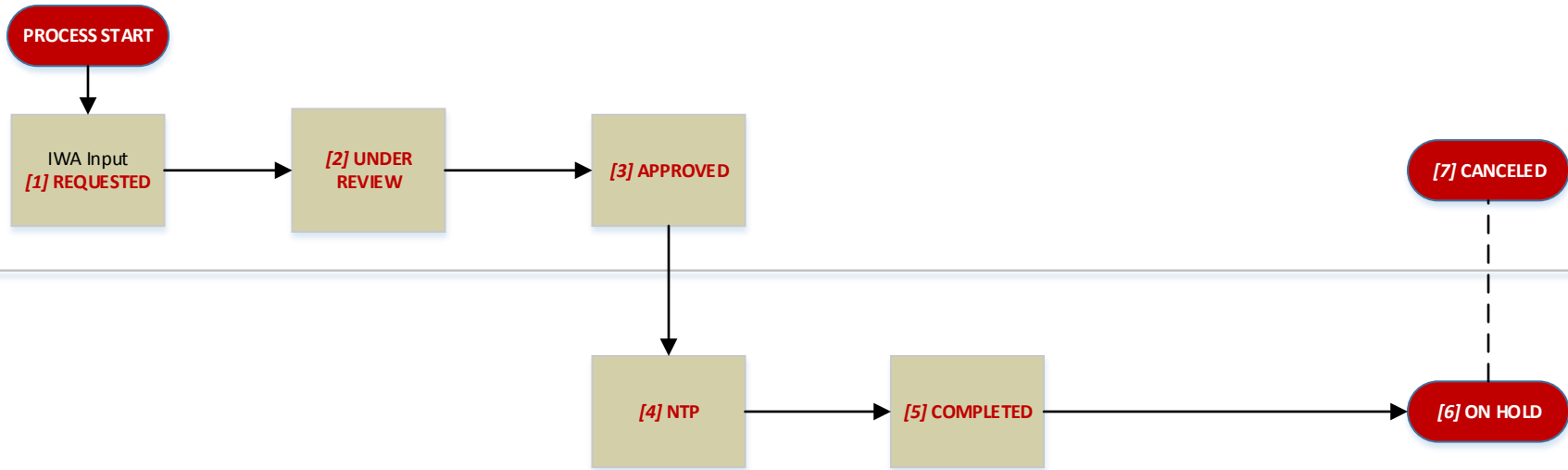
AiM Internal Work Amendment Process

Serial Workflow Parallel Workflow Informational Workflow

PROJECT MANAGER

PROCESS START

Amendment Input
[1] REQUESTED

OFFICE?

[14] CANCELED ← OR NO GO —

Workflow
[12] PM APPROVAL

— **[13] APPROVED**

GO

(Responsibilities in Process Box)

Workflow
IN HOUSE CONST MGR
[2] FMCS REVIEW

—OR→

Workflow
CT MEP MGR
[3] CT MEP REVIEW

—OR→

Workflow
CT STRUCT MGR
[4] CT STRUCTURAL REVIEW

—OR→

Workflow
FSS MANAGER
[5] SUPPORT SHOPS REVIEW

—OR→

Workflow
LAND SVC MGR
[6] LANDSCAPE REVIEW

—OR→

Workflow
DIST SYS MGR
[7] UTILITIES REVIEW

—OR→

Workflow
ASBESTOS MGR
[8] ASBESTOS REVIEW

—OR→

Workflow
EHS MGR
[9] EHS REVIEW

—OR—

Workflow
ADM ASSOC LRFP
[10] LRFP REVIEW

—OR→

Workflow
TBD
[11] IT REVIEW

Go Status: **PM APPROVAL**; No Go Status: **CANCELED**

AiM Consultant Invoice Process

Serial Workflow   Parallel Workflow   Informational Workflow

INVOICE ADMIN

PROCESS START

[1] RECEIVED

YES

Workflow
PROJECT MGR
[4] APPROVED
FOR PMT

[5] PROCESSED

[6] VOIDED

GO

INVOICE APPROVER

Workflow
PROJECT MGR
[2] UNDER
REVIEW

APPROVE?

NO

Workflow
PROJECT MGR
[3] CONSULT
INPUT REQ

NO GO

[7] REJECTED
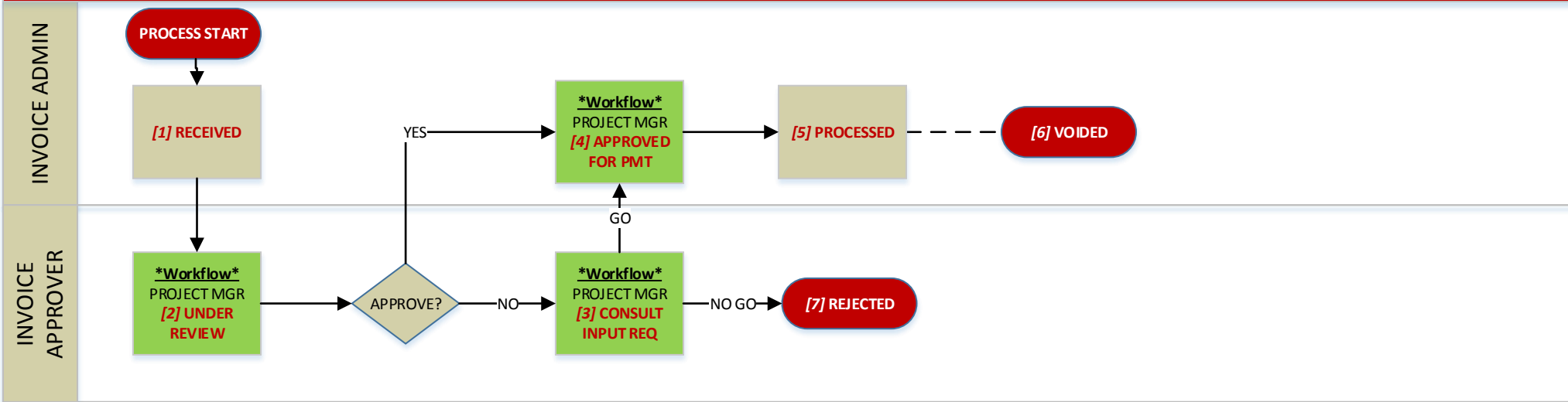
AiM Payment Application Process

Serial Workflow Parallel Workflow Informational Workflow

INVOICE ADMIN

PROCESS START

[1] RECEIVED

Workflow
PROJECT MGR
[4] APPROVED
FOR PMT

[5] PROCESSED

[6] VOIDED

YES

INVOICE APPROVER

Workflow
PROJECT MGR
[2] UNDER
REVIEW

APPROVE?

NO

Workflow
PROJECT MGR
[3] CONTR INPUT
REQ

NO GO

[7] REJECTED

GO
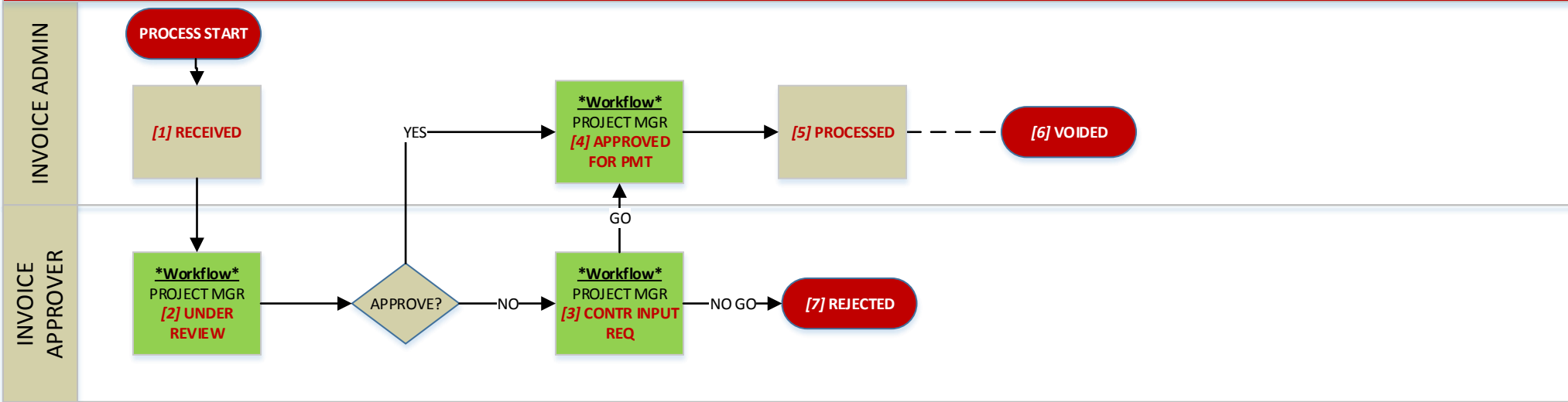
AiM Universal Action List Process – Design Review

Prepared for: Oklahoma State University

PROJECT MANAGER

PROCESS START

[1] INITIATION

Workflow
[SEE PROCESS DOCUMENT]
[2] UNDER REVIEW

Response: **Reviewed with Comment** OR **Reviewed No Comment**

[3] SUBMITTED TO A/E

[4] CANCELED

AiM Universal Action List Process – Building Permit

| | Serial Workflow | Parallel Workflow | Informational Workflow |

PROJECT MANAGER

PROCESS START

[1] INITIATION

Workflow
[3] PM CORRECTIONS

Workflow
[SEE PROCESS DOCUMENT]
[5] ISSUED

[4] CANCELED

NO GO

EHS FIRE MARSHALL

Workflow
EHS PLAN REVWR
EHS FIRE PROTCT
EHS FIRE LIFE INS
[2] UNDER REVIEW

GO

GO

ADMIN ASST EHS

Workflow
EHS FIRE MARSH
[4] FIRE MARSHALL REVIEW

NO GO

[6] DENIED

AiM Universal Action List Process – Building Permit

Serial Workflow	Parallel Workflow
Informational Workflow	

PROJECT MANAGER

PROCESS START

[1] INITIATION

Workflow
[3] PM CORRECTIONS

Workflow
[SEE PROCESS DOCUMENT]
[5] ISSUED PARTIAL

[6] FULL OCCUPANCY REQ

Workflow
[SEE PROCESS DOCUMENT]
[7] ISSUED FULL

[8] CANCELED

[9] CANCELED

NO GO

EHS FIRE MARSHALL

Workflow
EHS PLAN REVWR
EHS FIRE PROTCT
EHS FIRE LIFE INS
[2] UNDER REVIEW

NO GO

ADMIN ASST EHS

GO

Workflow
EHS FIRE MARSH
[4] FIRE MARSHALL REVIEW

GO
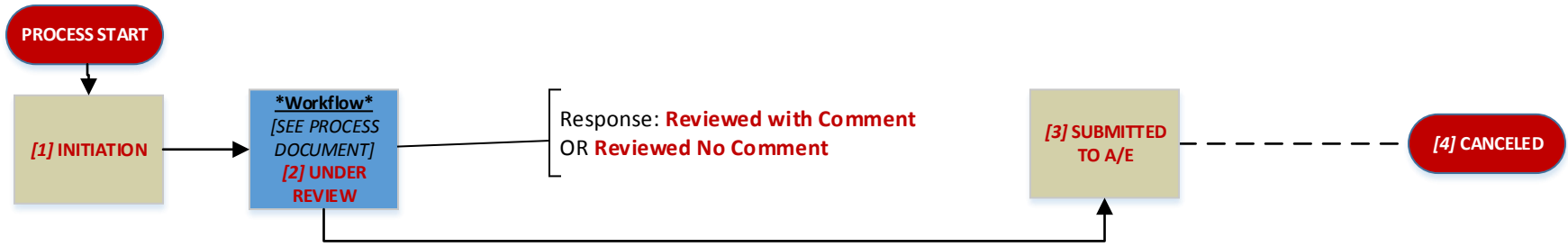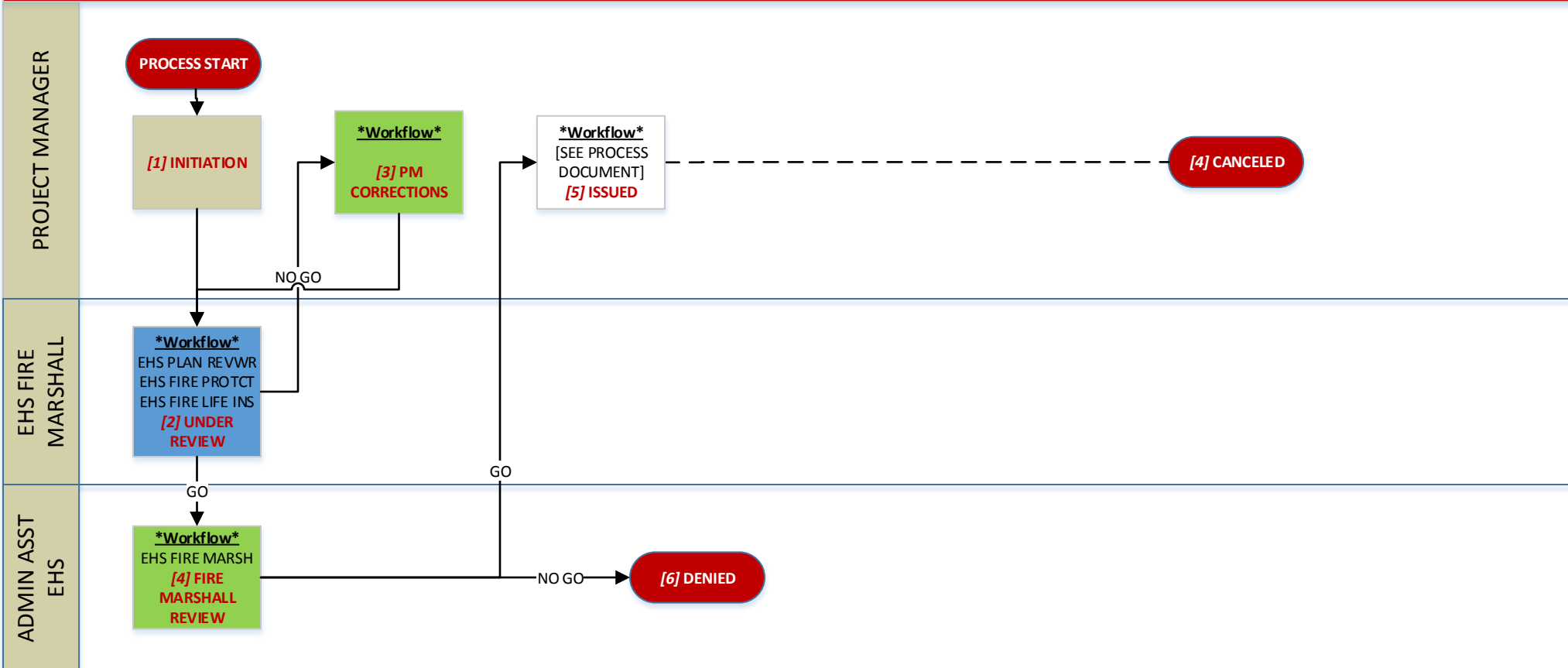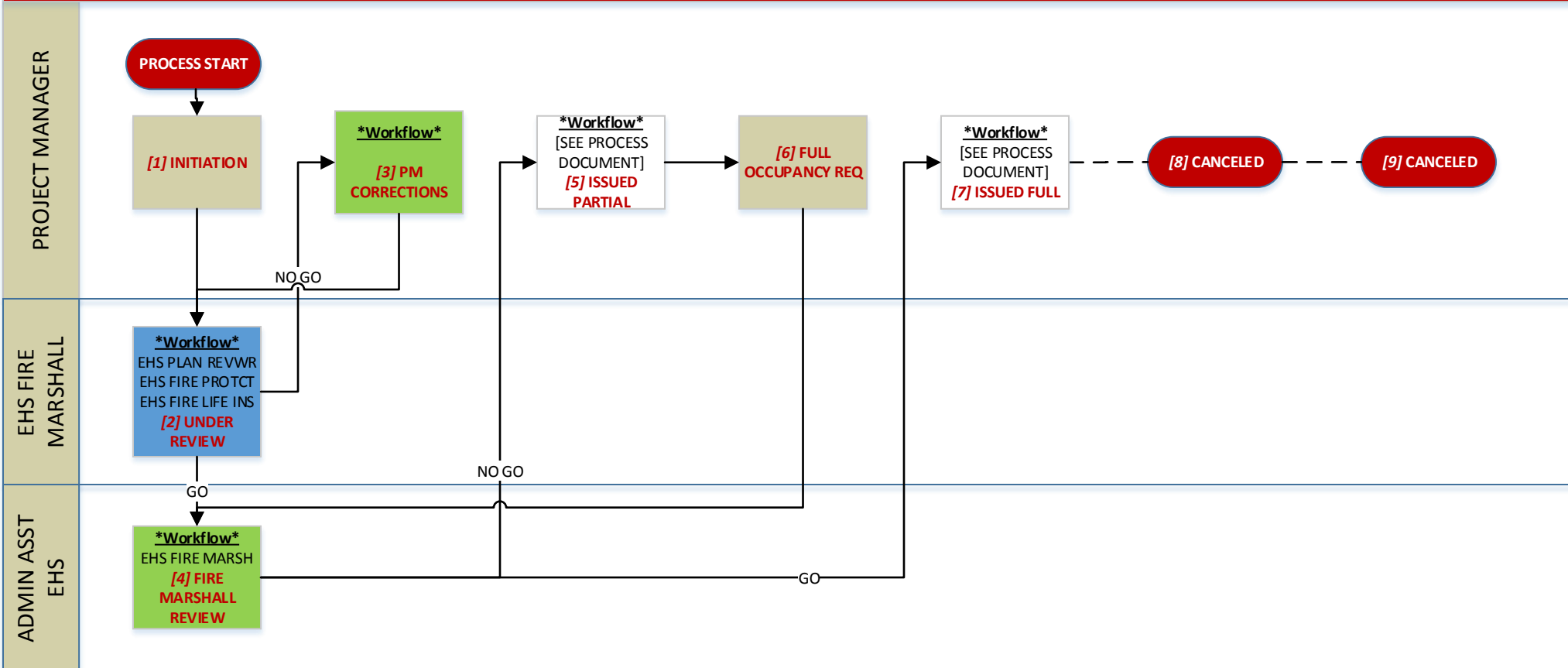
AiM Direct Expense Process

ADMIN ASSOC LRFP / CONTRACT SPCLST

PROCESS START

[1] OPEN → [2] APPROVED —OR→ [3] REJECTED ----- [4] CANCELED
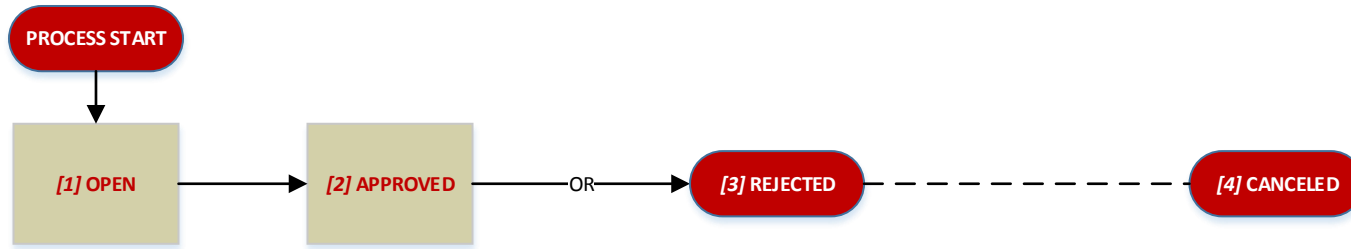
AiM Internal Work Agreement Coordination between CPPM & CMMS

Key: **CPPM – IWA PROCESS** | **CMMS -WORK ORDER PROCESS**

ADMIN ASSOC LRFP / PM / ADMIN ASST FMCS / ETC

ENTER IWA
[1] REQUESTED

ESTIMATE PHASE = CLOSED

PROJECT MANAGER

ENTER CUSTOMER REQUEST THROUGH PORTAL

RECEIVE ESTIMATE
[2] UNDER REVIEW

ATTACH / APPROVE ESTIMATE
[3] APPROVED

DRIVE INTO WORK ORDER

APPROVE WO
[1] ESTIMATE APPROVED

CHANGE IWA TO NTP
[6/4] NTP

WORK CONTROL

PREPARE WO ESTIMATE
[1] ESTIMATING

EMAIL ESTIMATE TO PM

CREATE PHASES ON WORK ORDER

IWA TYPE REPONSIBILITY

RECEIVE NOTICE OF NTP

NOTIFY WC OF PHASES NEEDED

ATTACH IWA TO WO