AiM Capital Project Process – LRFP Phase II (Design)

Prepared for: Oklahoma State University

Note: If selected Professional Services are dismissed, need to re-select Professional Services. Change Status to [7] PROF SVCS SELECTION.
**AiM Capital Project Process – FMCS (Design)**

**PROCESS START**

- Project Input
  - [1] INITIATION
  - PM Assigned?
    - YES
    - Assign PM
      - [2] PM ASSIGNMENT
      -  [3] CONCEPTUAL PLANNING
        - Design Req’d?
          - YES
            -  [4] PREDESIGN
            -  [5] CUITENT DESIGN APP
              - ACCEPT?
              - GO
              - NO
              -  [22] CANCELED
                -  [6] FUND DESIGN
                  - Workflow
                  - CONTRACT SPCLST
                  -  [7] DESIGN
                    - NO
                    -  [21] DECLINED
                      -  [7] DESIGN
                        - GO
                        - NO

**Prepared for:** Oklahoma State University
AiM Capital Project Process – FMCS (Construction)

Prepared for: Oklahoma State University

Project Manager:
- [8] Develop SOW
- [9] SOW Approval
- [10] Estimating
- [12] Fund Construction
- [14] NTP
- [15] Construction
- [16] Construction Closeout

Contract Specialist:
- [14] NTP
- [15] Construction
- [16] Construction Closeout

UA Plant Funds:
- [20] Closed

Serial Workflow
- [8] Develop SOW
- [9] SOW Approval
- [10] Estimating
- [12] Fund Construction
- [14] NTP
- [15] Construction
- [16] Construction Closeout
- [17] Financial Closeout

Parallel Workflow
- [20] Closed

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

Prepared for: Oklahoma State University

**ENERGY SYS DIRECTOR**

**UA PLANT FUNDS**

**PROCESS START**

1. **[8] PREDESIGN**  
   - *Workflow*
     - PROJECT MGR
     - ADM ASST UTIL

2. **[9] SD**  
   - *Workflow*
     - PROJECT MGR
     - ADM ASST UTIL
     - DIRECTOR FM

3. **[10] DD**  
   - *Workflow*
     - PROJECT MGR
     - ADM ASST UTIL
     - DIRECTOR FM

4. **[11] CD**  
   - *Workflow*
     - PROJECT MGR
     - ADM ASST UTIL
     - DIRECTOR FM

5. **CMAR?**  
   - YES
     - **[12] VPAF GMP APPROVAL**
     - **[13] FUND BALANCE**

6. **NO**  
   - NO GO

7. **GO**  
   - 14
AiM Capital Project Process – Landscape Services (Construction)

**Prepared for:** Oklahoma State University

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**PROCESS START**

1. **[7] DEVELOP SOW**
   - If DESIGN is changed, change status to **[6] DESIGN**

2. **[8] SOW APPROVAL**
   - Approved: **YES**
   - **[9] ESTIMATING**
   - **[10] ESTIMATE APPROVAL**

3. **[11] FUND CONSTRUCTION**

4. **[12] CONTRACT SET UP**

5. **[13] NTP**
   - **[14] CONSTRUCTION**

6. **[15] CONSTR CLOSEOUT**
   - **[16] FINANCIAL CLOSEOUT**

7. **[17] PROJECT CLOSEOUT**

8. **[18] CLOSED**

9. **[19] ON HOLD**

---

**UNANIMOUS**

- PROJECT MANAGER
- PREV MAIN SPC
- LAND SVC MGR
- LAND SVC MGR

- Setup Contract
- **[12] CONTRACT SET UP**

**Workflow**

- LAND SVC MGR
- DIR FACILITIES
- LAND SVC MGR

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**Serial Workflow**

**Parallel Workflow**

**Informational Workflow**

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

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AiM Capital Project Process – Interior Design (Design)

Prepared for: Oklahoma State University

Serial Workflow Parallel Workflow Informational Workflow

**Admin Assoc LRFP**
- **Process Start**
  - Project Input [1] Initiation

**Interior Designer**
- [22] Canceled
  - *Workflow*
    - [3] Assign Design Acct
      - [4] Design
          - [6] Estimate Approval
            - [7] Fund Project
              - [8] PO

**Ua Plant Funds**
- [22] Declined
  - *Workflow*
    - [6] Estimate Approval
      - No Go

Serial Workflow Parallel Workflow Informational Workflow

* Workflow

[1] Initiation
[4] Design
[6] Estimate Approval
[7] Fund Project
[8] PO
AiM Budget Revision Process – LRFP Budget Deviation

Prepared for: Oklahoma State University

**PROCESS START**

[1] REQUESTED

**UNIV ARCHITECT**
**ASST UNIV ARCH**
**ASSOC DIR LRFP**

[2] MANAGEMENT APPROVAL

*First Response*

[3] MANAGEMENT APPROVED

[4] ON HOLD

[5] REJECTED

GO

NO GO

[6] CANCELED
AiM Budget Revision Process – FMCS Allocation Adjustment

Prepared for: Oklahoma State University

**PROCESS START**

[1] REQUESTED

**PROJECT MANAGER**

[2] MANAGEMENT APPROVAL

*First Response*

CONSTR TM LEAD

[3] MANAGEMENT APPROVED

[4] ON HOLD

[5] REJECTED

NO GO

GO

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

Prepared for: Oklahoma State University

**PROCESS START**

1. REQUESTED

2. MANAGEMENT APPROVAL
   - *First Response*

3. MANAGEMENT APPROVED

4. ON HOLD

5. REJECTED

6. CANCELED

[Serial Workflow] [Parallel Workflow] [Informational Workflow]

Prepared for: Oklahoma State University

**PROCESS START**

1. INITIATION
2. PENDING
   - APPROVE?
     - YES → 3. APPROVED
     - NO → 5. REJECTED, 4. CLOSED, 6. CANCELED
AiM Issues Process – Information Only

Prepared for: Oklahoma State University

1. REQUESTED

[1] REQUESTED → FOLLOW UP?

2. PENDING


3. CLOSED

4. CANCELED
AiM Issues Process – CMAR Contingency

[1] INITIATION — PENDING — PROPOSED — PROPOSED — REJECTED

Prepared for: Oklahoma State University
AiM Submittals Process

1. SUBMITTED
2. UNDER REVIEW
3. REVISE & RESUBMIT
4. APPROVED
4. CANCELED

PROCESS START


YES → [4] APPROVED

NO → [3] REVISE & RESUBMIT

Prepared for: Oklahoma State University
AiM Consultant Contract Process – On Call LRFP

Prepared for: Oklahoma State University

PROCESS START

Contract Input
1 REQUESTED

Generate Task Order
4 GENERATE TO

Workbook*
PROJECT AD
ASSOC DIR LRFP
5 REVIEW TO

[6] AWAIT CONSULT SIG

Workbook*
DIRECTOR LRFP
2 REQUEST PROPOSAL

GO

Workbook*
PROJECT AD
ASSOC DIR LRFP
3 REVIEW PROPOSAL

GO

Workbook*
PROJECT MGR
9 AWARDED

[12] CANCELED


Execute Task Order
7 EXECUTE TO

[8] AWAITING PO

Workbook*
ASSOC DIR LRFP
PROJECT AD
PROJECT MGR
9 AWARDED

[10] COMPLETED

GO

NO GO

NO GO

NO GO
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.
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.
AiM Consultant Contract Process – On Call Utilities

Prepared for: Oklahoma State University

**PROCESS START**

1. REQUEST PROPOSAL

**Workflow**

DIRECTOR LRFP

2. REVIEW PROPOSAL

**Workflow**

PROJECT MGR

3. GENERATE TO

EXECUTE ORDER

4. REVIEW TO

CONSULT SIG

5. AWAITS

PO

6. EXECUTE TO

AWAITING

7. COMPLETED

[10] CANCELED


[12] AWARDED
AiM Consultant Contract Amendment Process

**PROCESS START**

Amendment Entry

[1] OPEN

**UNANIMOUS**

PROJECT MGR

[6] LRFP APPROVED

OR GO

[8] PROCESSED

[10] CANCELED

**Workflow**

PROJECT MGR

[2] LRFP UNDER REVIEW

LRFP

[9] DENIED

**Workflow**

PROJECT MGR

ASSOC DIR LRFP

[3] FMCS UNDER REVIEW

FMCS

[9] DENIED

**Workflow**

PROJECT MGR

CONST TM LEAD

[3] FMCS UNDER REVIEW

LAND

[9] DENIED

**Workflow**

PROJECT MGR

LAND SVC MGR

[4] LAND UNDER REVIEW

LAND

[9] DENIED

**Workflow**

PROJECT MGR

ENERGY SYS DIR

[5] UTIL UNDER REVIEW

UTILITY

[9] DENIED

Prepared for: Oklahoma State University
AiM Construction Contract Process – FM Low Bid

Prepared for: Oklahoma State University

Serial Workflow
Parallel Workflow
Informational Workflow

PROCESS START

CONTRACT SPECIALIST

Contract Input
[1] REQUESTED

*Workflow*
[3] ADVERTISE

*UNANIMOUS*
[5] UNDER REVIEW

[6] AWAITING PO

*Workflow*
[8] NTP

PROJECT MANAGER

*First Response*
CONTR SPCLT
[2] READY TO ADVERTISE

[4] BID OPENING

[7] AWARDED

[9] COMPLETED

[10] ON HOLD


[12] NO GO

[13] AWARDED
AiM Change Proposal Process – Landscape Services

- **PROCESS START**
- **[1] OPEN**
- **[2] UNDER REVIEW**
- **[3] APPROVED**
- **[4] PROCESSED**
- **[5] DENIED**
- **[6] CANCELED**

**PREPARED FOR:** Oklahoma State University

**Serial Workflow**
- **[1] OPEN**
- **[2] UNDER REVIEW**
- **[3] APPROVED**
- **[4] PROCESSED**
- **[5] DENIED**
- **[6] CANCELED**

**Parallel Workflow**
- **[1] OPEN**
- **[2] UNDER REVIEW**
- **[3] APPROVED**
- **[4] PROCESSED**
- **[5] DENIED**
- **[6] CANCELED**
AiM Change Proposal Process – Utilities

- **PROJECT MANAGER**
  - PROCESS START
    - [1] OPEN
    - *Workflow*
    - [3] APPROVED
    - [4] PROCESSED
    - [5] DENIED
    - [6] CANCELED

- **ENERGY SYS DIRECTOR**
  - *Workflow*
    - PROJECT MGR
    - [2] UNDER REVIEW
    - NO GO
    - [5] DENIED

-prepared for: Oklahoma State University
AiM Construction Contract Change Order Process

**Prepared for:** Oklahoma State University

**Process Start**
- Change Order Entry [1] OPEN
  - Project Type?
    - *Workflow* Project Mgr [10] LRFP APPROVED
      - [13] Denied
    - [12] Processed
    - [14] Canceled
  - [13] Denied

**Director: LRFP**
- LRFP Under Review [2]
  - Project Mgr
    - Project Ad Assoc Dir LRFP
      - [9] BOR APPROVAL
        - [13] Denied
        - [6] FMCS PEND Approval
          - LRFP Approval?
            - Yes
            - No
        - [7] LAND PEND APPROVAL
          - LRFP APPROVAL?
            - Yes
            - No
      - [13] Denied
      - [13] Denied

**CCS Director**
- FMCS Under Review [3]
  - Project Mgr
    - Const Mgr Lead
      - [3] FMCS UND Review
        - [13] Denied
        - [6] FMCS PEND Approval
          - LRFP APPROVAL?
            - Yes
            - No
    - Project Ad Assoc Dir LRFP
      - [9] BOR APPROVAL
        - [13] Denied
        - [6] FMCS PEND Approval
          - LRFP APPROVAL?
            - Yes
            - No
  - [13] Denied

**Landscape SVC Mgr**
  - Project Mgr
    - Dir Facilities
        - [13] Denied
        - [7] LAND PEND APPROVAL
          - LRFP APPROVAL?
            - Yes
            - No
    - Project Mgr
      - Dir FM
          - [8] UTIL PEND APPROVAL
            - LRFP APPROVAL?
              - Yes
              - No
          - [13] Denied
          - [13] Denied

**Energy Sys Dir**
  - Project Mgr
    - Director FM
        - [8] UTIL PEND APPROVAL
          - LRFP APPROVAL?
            - Yes
            - No
        - [13] Denied
        - [13] Denied
AiM Internal Work Agreement Process – LRFP

Prepared for: Oklahoma State University

IWA Input
[1] REQUESTED

[2] UNDER REVIEW

[3] ESTIMATING

[4] ESTIMATE APPROVAL

[5] APPROVED

[6] NTP

[7] COMPLETED

[8] ON HOLD

[9] CANCELED

[700] UNDER REVIEW

[704] CANCELED

[709] ON HOLD

[597] APPROVED

[601] GO

[386] APPROVED

[390] NO GO

[97] REQUESTED

[101] UNDER REVIEW

[105] ESTIMATING

[109] ESTIMATE APPROVAL

[113] APPROVED

[117] NTP

[121] COMPLETED

[125] ON HOLD

[129] CANCELED
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

[4] NTP

[5] COMPLETED

[6] ON HOLD

[7] CANCELED

(SEE BELOW)
AiM Internal Work Amendment Process

Prepared for: Oklahoma State University

Go Status: PM APPROVAL; No Go Status: CANCELED
AiM Consultant Invoice Process

**PROCESS START**

[1] RECEIVED

[Workflow]
PROJECT MGR
[2] UNDER REVIEW

APPROVE?

YES

[Workflow]
PROJECT MGR
[4] APPROVED FOR PMT

[5] PROCESSED

[6] VOIDED

GO

NO

[Workflow]
PROJECT MGR
[3] CONSULT INPUT REQ

GO

NO GO

[7] REJECTED

Prepared for: Oklahoma State University
AiM Universal Action List Process – Design Review

Prepared for: Oklahoma State University

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**

**Prepared for: Oklahoma State University**

**PROJECT MANAGER**

1. **INITIATION**
   - [1] PM CORRECTIONS

2. **UNDER REVIEW**
   - EHS PLAN REVWR
   - EHS FIRE PROTCT
   - EHS FIRE LIFE INS

3. **PM CORRECTIONS**
   - [3] INITIATION

4. **FIRE MARSHALL REVIEW**
   - EHS FIRE MARSH
   - EHS FIRE PROTCT

5. **ISSUED**
   - [5] ISSUED

6. **DENIED**
   - [6] DENIED

**Workflow**

- [1] INITIATION
- [3] PM CORRECTIONS
- [4] FIRE MARSHALL REVIEW
- [5] ISSUED
- [6] DENIED

**Graphical Workflow**

- **Serial Workflow**
- **Parallel Workflow**
- **Informational Workflow**
AiM Universal Action List Process – Building Permit

PROJECT MANAGER

**PROCESS START**

1. **INITIATION**
   - [1] INITIATION
   - [3] PM CORRECTIONS

EHS FIRE MARSHALL

*Workflow*
- EHS PLAN REVWR
- EHS FIRE PROTECT
- EHS FIRE LIFE INS
- [2] UNDER REVIEW

PM CORRECTIONS
- GO
- NO GO

ADMIN ASST EHS

*Workflow*
- EHS FIRE MARSH
- [4] FIRE MARSHALL REVIEW

[6] FULL OCCUPANCY REQ
- [6] FULL OCCUPANCY REQ
- [8] CANCELED
- [9] CANCELED

Prepared for: Oklahoma State University

[Diagram with workflow paths and decision points:]

- Serial Workflow
- Parallel Workflow
- Informational Workflow

- INITIATION
- UNDER REVIEW
- PM CORRECTIONS
- FULL OCCUPANCY REQ
- CANCELED
AiM Internal Work Agreement Coordination between CPPM & CMMS

Prepared for: Oklahoma State University

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

ADMIN ASSOC RFP / PM / ADMIN ASS'T FMCS / ETC

PROJECT MANAGER

WORK CONTROL

IWA TYPE RESPONSIBILITY

ENTER IWA [1] REQUESTED

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

PREPARE WO ESTIMATE [1] ESTIMATING

EMAIL ESTIMATE TO PM

CREATE PHASES ON WORK ORDER

RECEIVE NOTICE OF NTP

NOTIFY WC OF PHASES NEEDED

ATTACH IWA TO WO

ESTIMATE PHASE = CLOSED

CLOSED