



AssetWorks LLC

STANDARD OPERATING PROCEDURES



Capital Planning and Project Management Module

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STANDARD OPERATING PROCEDURE DEFINITION

This Standard Operating Procedure (SOP) document is an overview of the basic setup and operation of the AiM Capital Planning and Project Management Module contained in AiM Release 7.0. The SOP describes the use of the AiM Capital Planning and Project Management Module and all related AiM Modules that have been configured to record and manage the CPPM functions for Oklahoma State University. The descriptions and process flows that follow offer detailed procedures for requesting, assigning, tracking and reporting on the various types of Capital Projects, Workflow Templates, Consultant Contracts and Consultant Contract Invoices, and Construction Contract and Construction Pay Applications that have been defined into the AiM CPPM application. Individuals within the Oklahoma State University and external entities that have AiM responsibilities will be trained in the use of the system, by functional area, as applicable. The SOP contains an overview in the following areas:

- 1) Business Process Framework
- 2) System Configuration
- 3) System Operation

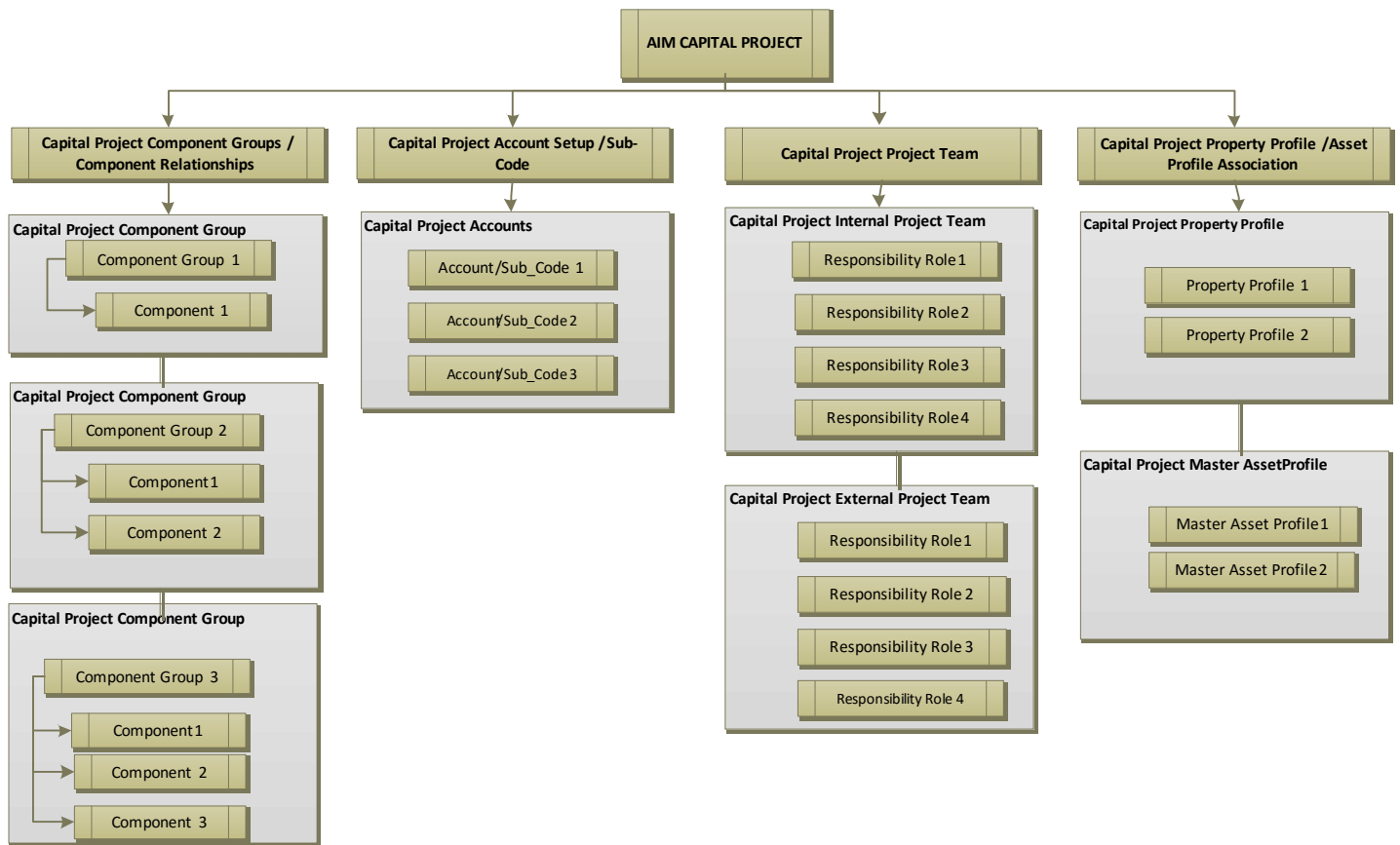
1.0 BUSINESS PROCESS FRAMEWORK

BUSINESS PROCESS FRAMEWORK OVERVIEW

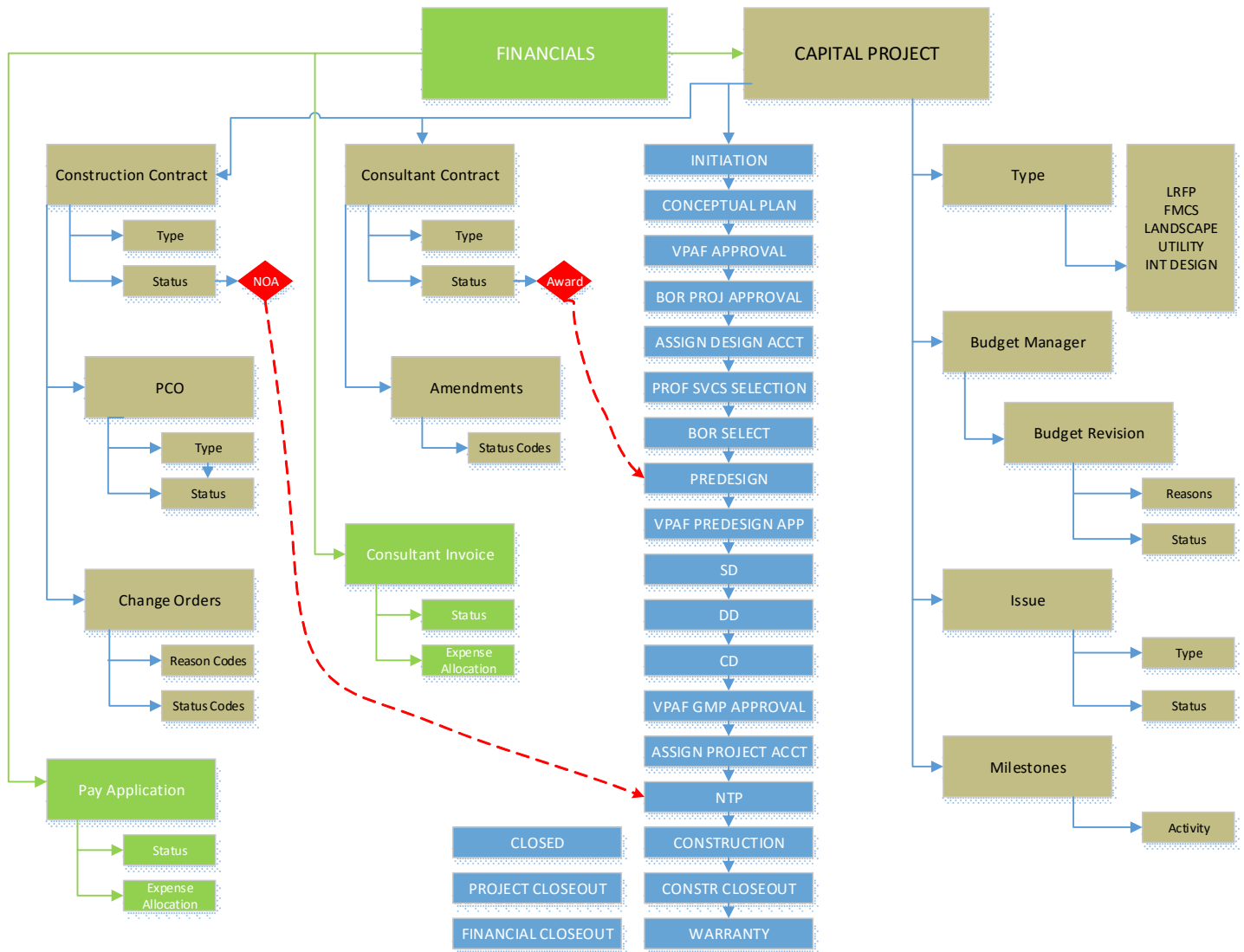
The Business Process Framework as it relates to AiM Capital Planning and Project Management functionality is determined by the Oklahoma State University’s utilization of the AiM CPPM Module in the following software modules:

1. System Administration
2. Finance (and Accounting)
3. Capital Planning and Project Management
4. Contract Administration
5. Accounts Payable
6. Time and Attendance

The Business Process Overview for each of the modules as listed above is displayed in the graphic below.



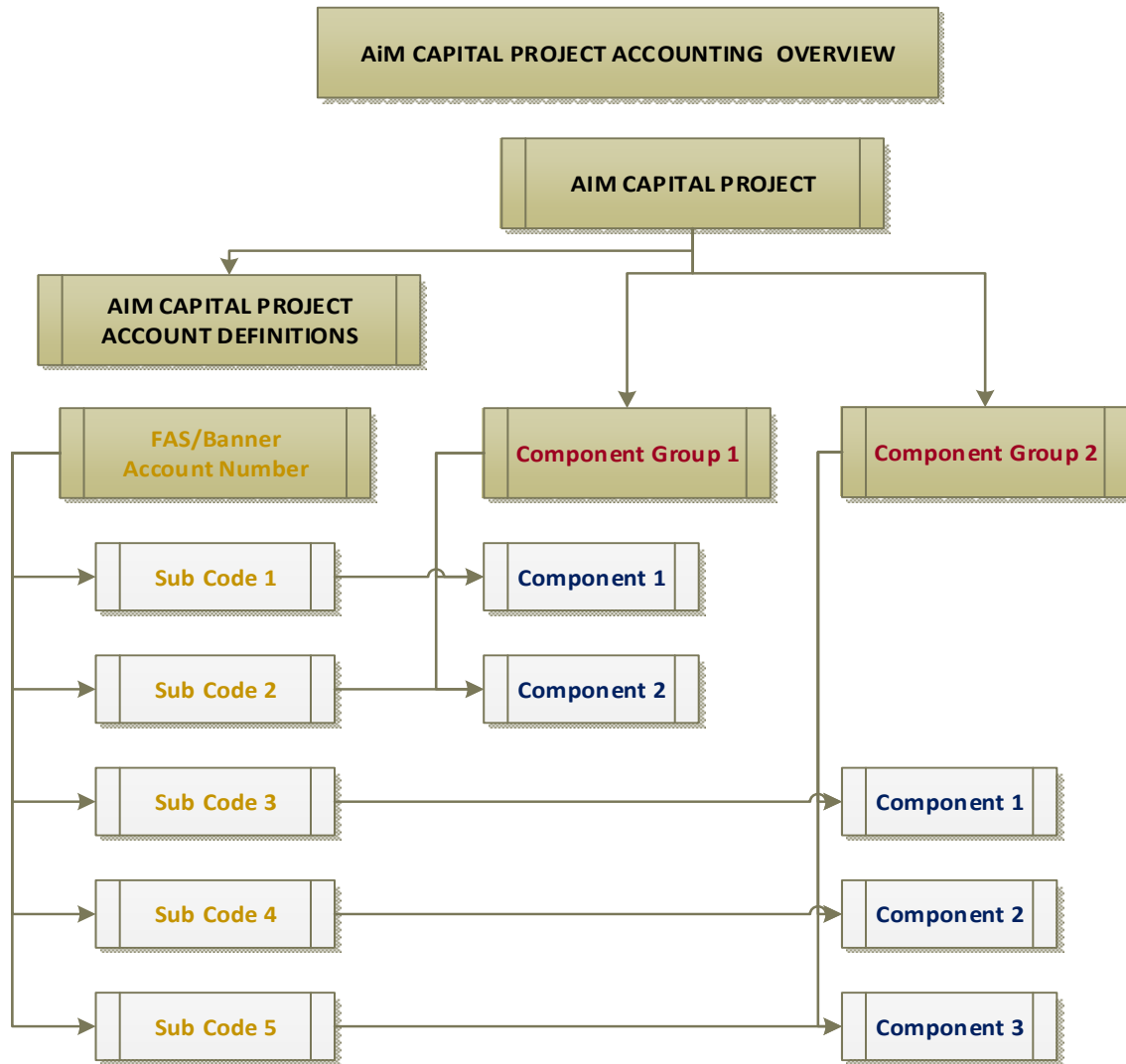
Conceptual relationships of Oklahoma State University's Capital Project Structure



FINANCE AND ACCOUNTING BUSINESS PROCESS FRAMEWORK

The Business Process Framework utilized by Oklahoma State University for Capital Project Funding is based on the relationships between the Capital Project, Account (Funding_Code), Funding Group/Funding Source and the Account (Funding_Code) associated Sub_Code.

The conceptual relationships between the Capital Project, the funding group/source, the Capital Project Account/Sub_Code distributions, and the Capital Project Component Groups and Components are displayed below:





DIRECT EXPENSES

The Direct Expense Screen has two primary functions: first, to directly process expense transactions (labor, material, equipment, and contract) and associate them to the capital project, and second, to find existing approved capital project timesheet records and process them to add labor costs to the capital project.

Approved capital project timesheet entries automatically create a direct expense record in the open status. Before processing them on the Direct Expense Approval Screen, expense allocation for each record must be performed. The direct expense record is saved in the open status after expense allocation is performed and then the capital project timesheets can be processed by the Direct Expense Approval Screen.

Mass import of transactions can be accomplished with manually prepared files that can be imported directly into the Direct Expense Screen using the Direct Expense Import Screen (located in the setup portion of the Finance Module).

Workflow can play a critical role in ensuring direct expenses are reviewed and allocated prior to approving the direct expense.

Direct Expense Status Codes

The status block houses the direct expense status, type, sub ledger (i.e., labor, material, equipment, and contract) and a display of total cost. The type code does not enforce a hierarchical relationship with the status but does have additional setup options. The direct expense type can be set to be the defaulted type and whether or not the type is associated to timesheets (e.g., the type is often set to default the timesheet setting to expedite processing).

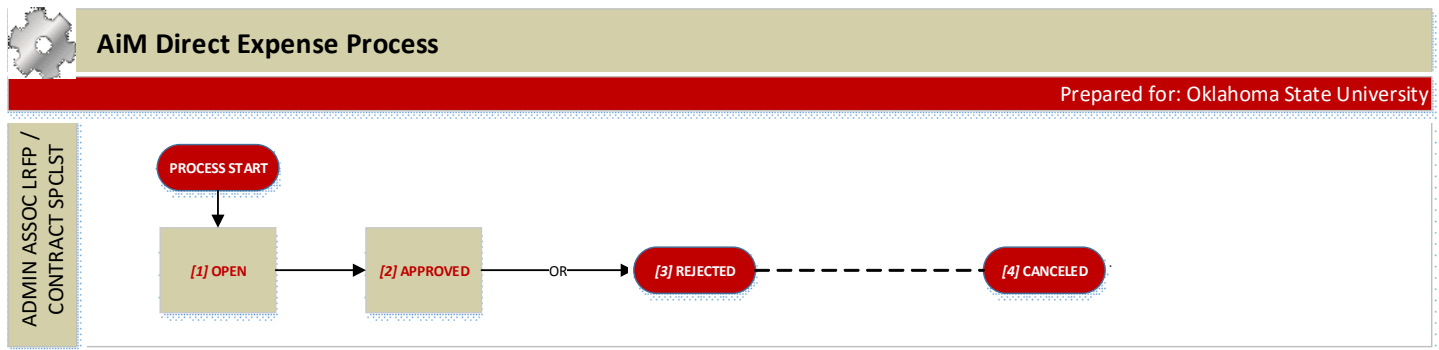
Oklahoma State University has defined the following Status Codes in the system:

1. OPEN (Open)
2. APPROVED (Posted)
3. REJECTED (Rejected)
4. CANCELED (Canceled)

The Behavior of the Direct Expense Status Flags is displayed in the table below:

Status Flag	Actions
Open	This transaction requires approval to post as an expense. When the direct expense is re-edited while in the open status flag, the available status flags are open, posted, rejected, and canceled.
Posted	When this status flag is saved it changes the component/capital project committed cost to an expensed cost. Re-editing the direct expense record does not allow edits to any field other than the status and the only status available is voided.
Canceled	When a status flag is saved it does not allow further editing.
Rejected	This status flag is like the cancel status flag but it allows edits to enable re-opening the direct expense record.
Voiced	This status flag is only available after the direct expense record is saved with the posted status flag. Once saved, it removes the expensed transaction from the capital project such that another entry can be made representing the corrected amount.

Direct Expense Approval Process



DIRECT EXPENSE PROCESS DOCUMENTATION

1. OPEN

1. **ADMIN ASSOC LRFP/CONTRACT SPECIALIST**

1. Enter Direct Expense

1. Choose Direct Expense Type, based on if the charge needs to go to the General Ledger, or if it has already been charged to an account, choose a type that doesn't need to send to the GL
2. Subledger = "CONTRACT"
3. Add Capital Project, Component Group, and Component

2. APPROVED (Approval by ASSOC DIR LRFP Direct Expense Approval Screen)

3. REJECTED (Direct Expense Approval Screen)

4. CANCELED



CAPITAL PLANNING AND PROJECT MANAGEMENT BUSINESS PROCESS FRAMEWORK

The Business Process Framework utilized by Oklahoma State University for a CPPM Module based Capital Project is derived from a combination of the Capital Project Type, Capital Project Component Group, and the Capital Project Component Group/Components as defined in the AiM CPPM Module.

CAPITAL PROJECT COMPONENTS

A Capital Project Component is a user-defined element of a Capital Project that is specifically set up to have dates, people, activities and costs tracked separately for management, financial or reporting purposes. Capital Project Components are required to be related to a Capital Project Component Type.

Budgets and Capital Project Allocated Expenses are tracked at the Capital Project Component level.

The Capital Project Accounting and Expense Allocation can be defined at the Capital Project Component level in order to facilitate the Capital Project Expense Allocation process. All accounting must be defined for the Capital project before it is available to be defined (and filtered) to the Capital project Component.

Capital Project Components are then grouped together into Capital Project Component Groups further enhancing the management of a Capital Project.

At least one Capital Project Component Group and one Capital Project Component are necessary to track budgets and allocated expenses against a Capital Project.

The Capital project Component definitions are viewable in Section 2, System Configuration, of the Standard Operating Procedure document.

Capital Project Component Groups

Capital Project Component Groups are user defined groupings and are validated in order to keep reporting and management of projects consistent. Components, however, can be either pre-defined and validated or defined as required for a specific Capital Project.

All Capital Project Component Budgets and Costs are summarized at the Capital Project Component Group level.

Capital Project Component Types

Capital Project Components are typically grouped by Component Types to facilitate management and reporting. Oklahoma State University has defined four (4) distinct Component Types in the system:

1. **Hard Costs.** The direct costs incurred in relation to a specific construction project that are directly related to the construction phase of the project. They typically include labor, materials, equipment, basic building services, shell features, interior enclosures, fit-out costs, mechanical services and electrical services.
2. **Soft Costs.** The indirect costs that are incurred during the lifetime of a project that are not construction related. The items that are categorized as soft costs include legal fees, permits, real estate commissions and fees, advertising, promotions, financing fees, insurance, leasing, mortgages, loans, construction interest, design fees, taxes, management fees, owner's administration, supervision, engineering, licensing fees, toxic report fees, plan check fees, property assessment fees, sewage and water connection fees, and equipment rental fees.
3. **Contingency.** Future costs that have not been predicted, but are anticipated throughout the life a project.
4. **Labor.** This type is added to track Project Manager Time input for Labor tracking against a Capital Project.



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Capital Project Component Status Codes

Capital Project Components also have related Component Status Codes which represent the life cycle of a component over the life of a Capital Project. Component Status Codes are dependent upon the Component Types that have been defined in the system.

A Capital Project may be active for years, but Capital Project Components can be completed any time and thus need statuses to accurately depict progress.

The Oklahoma State University has defined the Capital Project Component Status Codes on a one-to-one relationship with the AiM Component Status System Flags for each Component Type:

1. Pending
2. Active
3. Work Complete
4. Closed
5. Canceled

The behavior of the Component System Status Flags is contained in the table below:

Status Flag	Actions
Pending	The pending status does not allow transactions and is for planning purposes only. Original budget figures can be entered.
Active	Transactions can take place when the project component status is set to active. Once active, the component status cannot be set back to pending. Original budget modifications are not allowed and must be changed via the Budget Revision Screen.
Work Complete	This status does not allow new transactions but does allow the completion of transactions started prior to work complete.
Canceled	This status does not allow any transactions. This status cannot be selected if there are unprocessed transactions associated to this component.
Closed	Project Component is closed and no transactions are allowed. This status cannot be selected if there are unprocessed transactions associated to this component.

CAPITAL PROJECT

The Capital Project Screen is the main source of information on a Capital Project. The Capital Project is the central hub to which all Capital Project related transactions will be associated. Most of the associations are made at the Capital Project Component level, where the Capital Project Component is the most detailed level of tracking for the Capital Project. These Capital Project Components can then be grouped into Capital Project Component groups for easier management and reporting within a single Capital Project. All the financial and date information related to the Capital Project is easily accessible at any level.

Capital Project Types

Capital Project Types are user defined classifications of Capital Projects for management and reporting purposes. Capital Project Types that are defined have the ability to default the Capital Project Milestones, the Capital Project Team, and the Capital Project Component Group/Capital Project Components so that the Project Manager does not have to manually build the Capital Project Structure.

The following Capital Project Types have been defined into the system to date and all Capital Project Types will initially have the same Capital Project Component Group/Capital Project Component associations:

1. LRFP
2. LRFP INTERIOR DESIGN
3. FMCS
4. UTILITY CMAR
5. UTILITY STANDARD
6. LANDSCAPE SERVICES

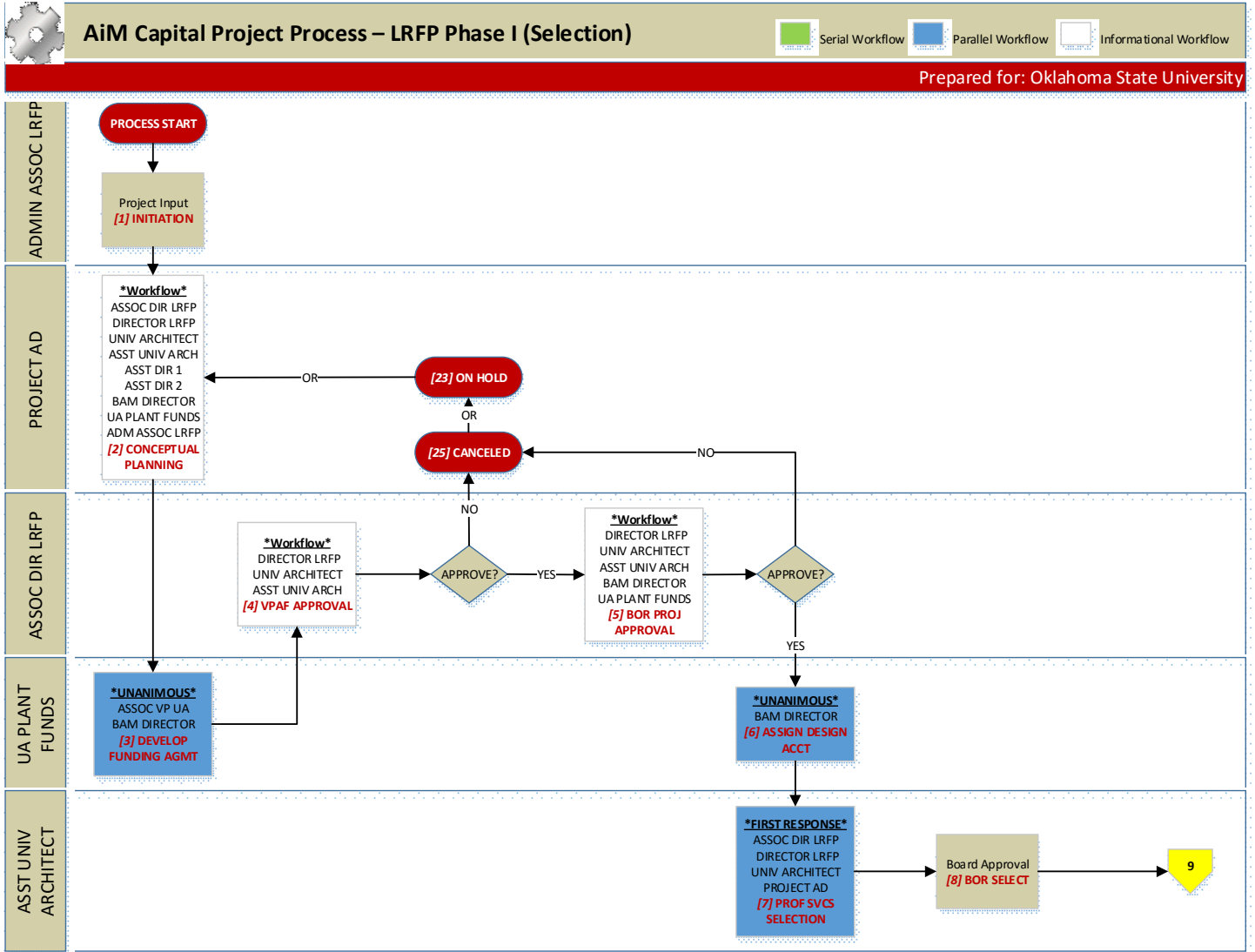
Capital Project Status Codes

Capital Project Status Codes have been predefined based on user business process flows determined during the implementation and are unique to each Capital Project Type. For Oklahoma State University, individual status codes have been defined for each Capital Project Type, creating their own Business Process Workflow.

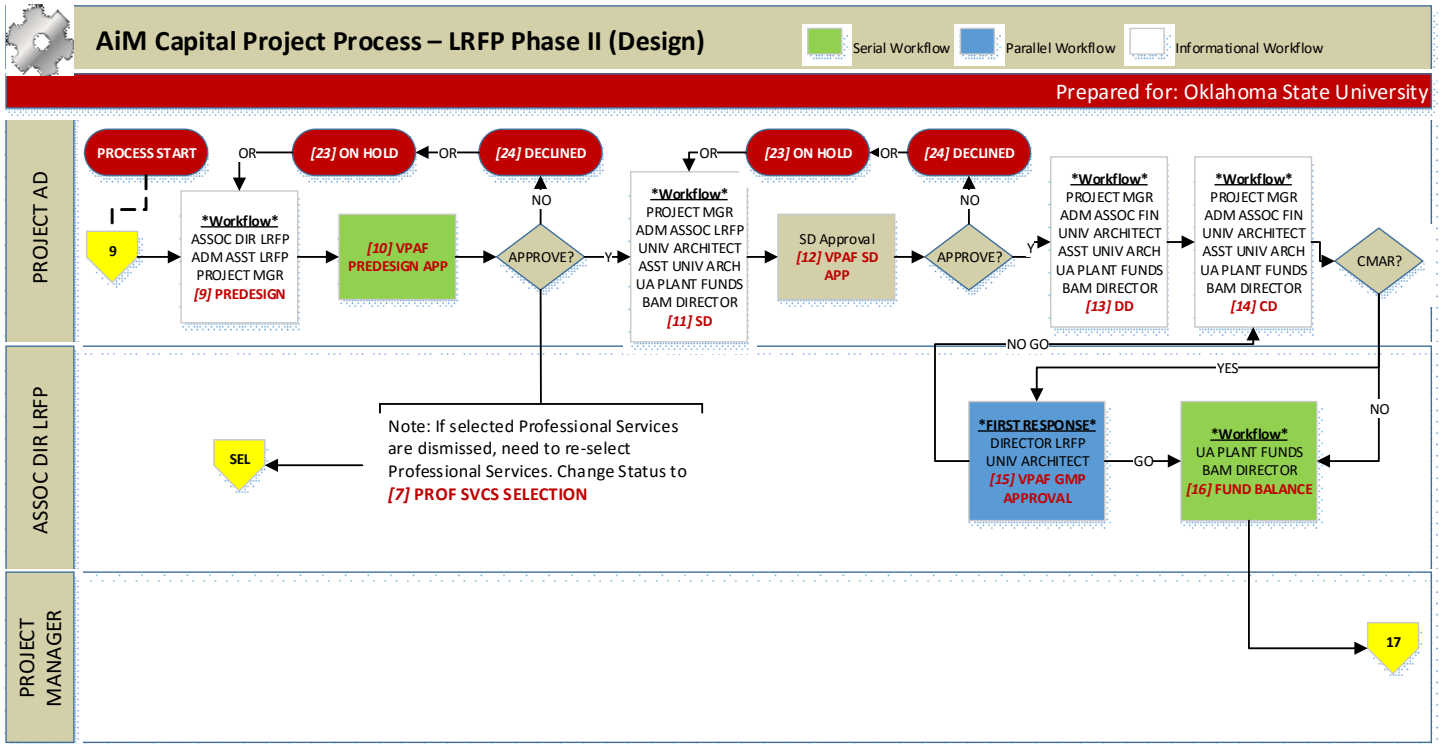
For any Capital Project, the associated Capital Project Status Code must be set with a System Flag of “Active” and at least one Capital project Component must also be “Active” before any financial transactions can occur against the Capital Project/Component combination.

Capital Project Approval Process – LRF

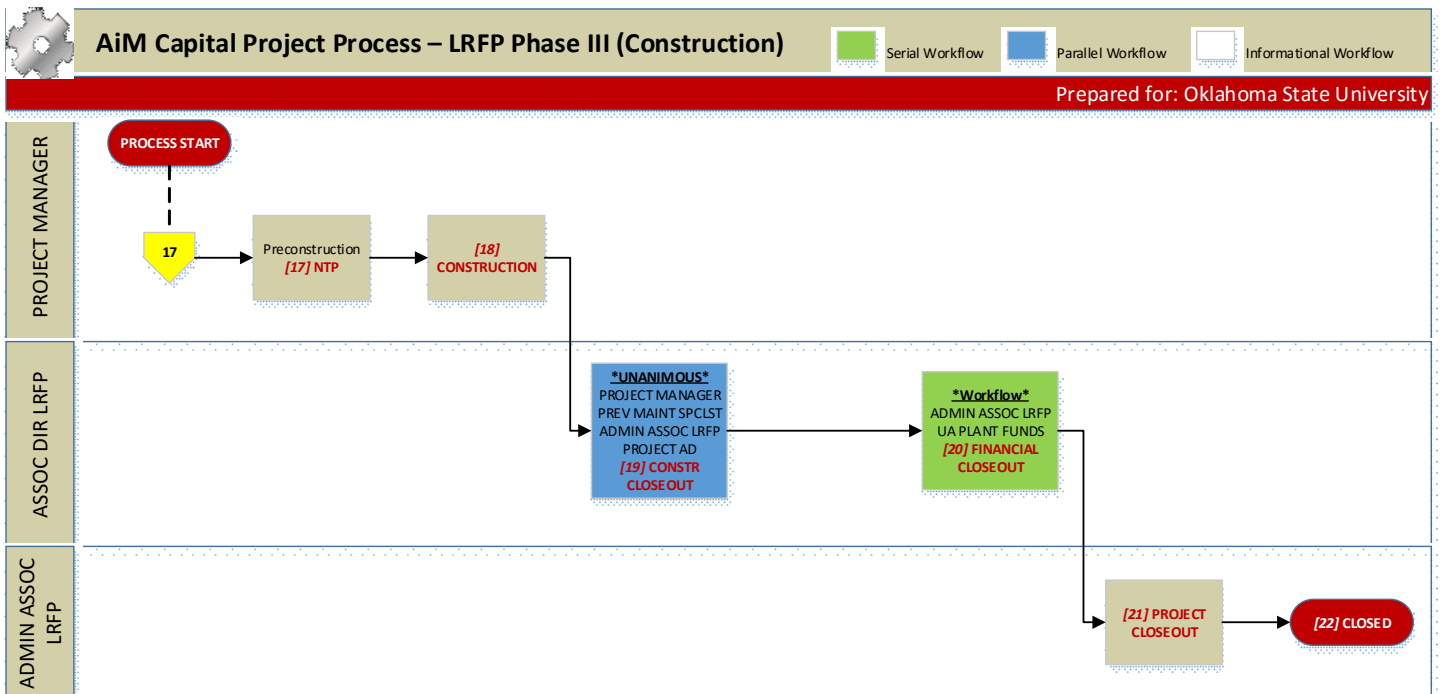
PHASE 1 - SELECTION



PHASE II - DESIGN



PHASE III - CONSTRUCTION





LRFP PROCESS DOCUMENTATION

1. INITIATION

1. **ADMIN ASSOC LRFP**

1. Auto Assign CP Number
2. Description (short)
3. Extra Description – Scope Statement
4. Type – LRFP
5. Owner Org
6. Manager = D0214S
7. Property if existing building
8. UDF for Client Requested Completion if applicable
9. Enter Customer Request Number in UDF
10. Enter Board Approval (Y/N) in UDF
11. Attach any emails or other documents supplied by the client as related documents
12. Change status to **CONCEPTUAL PLANNING**

2. CONCEPTUAL PLANNING – *Workflow: Informational only*

1. **ASSOC DIR LRFP**

1. Assign Assistant Director for the project

2. **DIRECTOR LRFP**

3. **UNIVERSITY ARCHITECT**

4. **ASST UNIV ARCHITECT**

5. **ASSISTANT DIRECTOR 1**

6. **ASSISTANT DIRECTOR 2**

(This team meets to assign lead roles and determine how to further define scope.)

7. **BAM DIRECTOR**

8. **UA PLANT FUNDS**

9. **ADMIN ASSOC LRFP** or **ADMIN ASST LRFP**

1. Enter Emp ID in the Project Manager Employee field
2. Enter Emp ID in the PROJECT AD Project Team Responsibility field
3. Attach documentation from 2.9.1 and 2.9.2 to Capital Project
4. Enter Planned Budget if applicable
5. Note: this is iterative until there is enough information for a BCL

10. **PROJECT AD**

1. Scope Definition/Refinement
2. Assistant Director and University Architect or Assistant University Architect meet with prospective client
3. Provide documentation from 2.9.1 and 2.9.2 to **ADMIN ASSOC** or **ADMIN ASST LRFP**
4. Develop Project Components
5. Enter project component budgets
6. Update UDF for requested completion date if applicable
7. Activate All Components
8. Change Status to **DEVELOP FUNDING AGMT**

3. DEVELOP FUNDING AGMT – *Workflow: Parallel - Unanimous; Go Status: **VPAF APPROVAL**, No Go Status: **CONCEPTUAL PLANNING***

1. **ASSOC VP UA**

1. Input funding agreement information

2. **BAM DIRECTOR**

4. VPAF APPROVAL – *Workflow: Informational Only*

1. **DIRECTOR LRFP**

2. **UNIVERSITY ARCHITECT**
3. **ASST UNIV ARCHITECT**
4. **ASSOC DIR LRFP**
 1. Coordinate approval with VPAF, LRFP Director, University Architect/Asst Univ Architect
 2. Response:
 1. Respond to Workflow (Go or No Go)
 2. If approved, Change Status to **BOR PROJ APPROVAL**, if not approved, change status to **CONCEPTUAL PLANNING, ON HOLD**, or **CANCELED**
5. **BOR PROJ APPROVAL – Workflow: Informational Only**
 1. **UNIVERSITY ARCHITECT**
 1. Draft Board Items and submit via AIRS
 2. Enter/Update Activity planned dates related to Board Approval
 2. **ASST UNIV ARCHITECT**
 1. Draft Board Items and submit via AIRS
 2. Enter/Update Activity planned dates related to Board Approval
 3. **DIRECTOR LRFP**
 4. **BAM DIRECTOR**
 5. **UA PLANT FUNDS**
 6. **ASSOC DIR LRFP**
 1. Response:
 1. Respond to Workflow (Go or No Go)
 2. If approved:
 1. Enter note with amount needed for Design Professional
 2. Change Status to **ASSIGN DESIGN ACCT**
 3. If not approved, change status to **CONCEPTUAL PLANNING, ON HOLD**, or **CANCELED**
6. **ASSIGN DESIGN ACCT – Workflow: Parallel – Unanimous; Go Status: **PROF SVCS SELECTION**; No Go Status: N/A**
(Personal Query based on # of days in Status)
 1. **UA PLANT FUNDS**
 1. If funding group, source or account does not exist in AIM, enter account in AIM (match FRS)
 2. Enter Funding Groups and Funding Sources
 3. Enter Accounts
 2. **BAM DIRECTOR**
 1. Review Funding Groups and Funding Sources and coordinate with UA Plant Funds
7. **PROF SVCS SELECTION – Workflow: Parallel - First Response (UNIV ARCHITECT/ASST UNIV ARCHITECT); Go Status: **BOR SELECT**; No Go Status: N/A**
 1. **ASSOC DIR LRFP**
 2. **DIRECTOR LRFP**
 3. **PROJECT AD**
 1. Assign Project Manager and enter in Project Team Responsibility field
 4. **UNIVERSITY ARCHITECT**
 1. Solicit, interview, summarize (A&E, CMAR)
 2. Respond to Workflow
 5. **ASST UNIV ARCHITECT**
 1. Solicit, interview, summarize (A&E, CMAR)
 2. Attach Board Documents to the Capital Project
 3. Enter/Update Activity planned dates related to Board Approval
 4. Submit Board Agenda Item in AIRS
 5. Respond to Workflow



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8. BOR SELECT
 1. **ASST UNIV ARCHITECT**
 1. Enter/Update Activity actual dates related to Board Approval
 2. When Board approval obtained, change status to **PREDESIGN** (Do not activate any components.)
9. PREDESIGN – *Workflow: Informational only*
 1. **ASSOC DIR LRFP**
 1. Confirm ALL Components are active
 2. Prepare Contract Documents
 3. For A&E – Consultant Contract Process
 4. For CMAR – Construction Contract Process
 2. **ADMIN ASST LRFP**
 1. Assist Assoc Dir with Contracts
 3. **PROJECT MANAGER**
 1. Enter/Update Activity Schedule as appropriate
 2. Link Milestones with Activities or Components as appropriate
 3. Update Project Team to assign employee to INVOICE ADMIN and INVOICE APPROVER responsibilities
 4. **PROJECT AD**
 1. Submit Budget Revisions as appropriate (LRFP Budget Dev)
 2. Conduct Design Team and Project Team meetings
 3. When ready to submit to VPAF for approval to proceed, change status to **VPAF PREDESIGN APP**
10. VPAF PREDESIGN APP (*personal query*)
 1. **PROJECT AD**
 1. Response:
 1. If approved,
 1. Enter note with amount needed for SD
 2. Change status to **SD**
 2. If not approved, change status to **PREDESIGN, ON HOLD, OR DECLINED**
 3. Selected Professional Services are dismissed, need to re-select Professional Services.
 1. If re-select of Professional Services change status to **PROF SVCS SELECTION**
11. SD – *Workflow: Informational Only*
 1. **PROJECT MANAGER**
 1. UAL for 50% design review
 2. UAL for 100% design review
 2. **ADMIN ASSOC LRFP**
 3. **UNIVERSITY ARCHITECT**
 4. **ASST UNIV ARCHITECT**
 5. **UA PLANT FUNDS**
 1. Enter Funding Adjustment based on note from PROJECT AD, if needed
 6. **BAM DIRECTOR**
 1. Enter Funding Adjustment based on note from PROJECT AD, if needed
 7. **PROJECT AD**
 1. When SD accepted (if not accepted, status stays in SD)
 1. Verify Budget based on SD Phases.
 2. Enter note with amount needed for DD
 3. Initiate Amendment for A&E Contract
 4. Change status to **VPAF SD APP**
12. VPAF SD APP (*personal query*)



AiM™ CPPM Standard Operation Procedures

1. **PROJECT AD**
 1. Response:
 1. If approved,
 1. Enter note with amount needed for SD
 2. Change status to **DD**
 2. If not approved, change status to **SD, ON HOLD, OR DECLINED**
13. **DD - Workflow: Informational Only**
 1. **PROJECT MANAGER**
 1. UAL for 50% design review
 2. UAL for 100% design review
 2. **ADMIN ASSOC FINANCE**
 3. **UNIVERSITY ARCHITECT**
 4. **ASST UNIV ARCHITECT**
 5. **UA PLANT FUNDS**
 1. Enter Funding Adjustment based on note from PROJECT AD, if needed
 6. **BAM DIRECTOR**
 1. Enter Funding Adjustment based on note from PROJECT AD, if needed
 7. **PROJECT AD**
 1. When DD accepted
 1. Verify Budget based on DD Phases
 2. Enter note with amount needed for CD
 3. Initiate Amendment for A&E Contract
 4. Change status to **CD**
14. **CD - Workflow: Informational Only**
 1. **PROJECT MANAGER**
 1. UAL for 50% design review
 2. UAL for 95% design review
 2. **ADMIN ASSOC FINANCE**
 3. **UNIVERSITY ARCHITECT**
 4. **ASST UNIV ARCHITECT**
 5. **UA PLANT FUNDS**
 1. Enter Funding Adjustment based on note from PROJECT AD, if needed
 6. **BAM DIRECTOR**
 1. Enter Funding Adjustment based on note from PROJECT AD, if needed
 7. **PROJECT AD**
 1. Verify Budget based on CD phases.
 2. When CD accepted, if CMAR change status to **VPAF GMP APPROVAL**, if not CMAR, change status to **FUND BALANCE**.
15. **VPAF GMP APPROVAL - Workflow: Parallel - First Response; Go Status: **FUND BALANCE**; No Go Status: **CD****
 1. **DIRECTOR LRFP**
 2. **UNIVERSITY ARCHITECT**
 3. **ASST UNIV ARCHITECT**
 4. **ASSOC DIR LRFP**
 1. Coordinate approval with VPAF, LRFP Director, University Architect
 1. Enter note with amount needed to fund remaining balance of project
 2. Initiate Amendment (Construction Change Order) for CMAR Contract
 2. Response:
 1. Respond to Workflow (Go or No Go)
16. **FUND BALANCE – Workflow: Serial; Go Status: **BID**; No Go Status: **N/A****
(Personal Query based on # of days in Status)



AiM™ CPPM Standard Operation Procedures

1. **UA PLANT FUNDS**
 1. Enter Funding Adjustment based on note from ASSOC DIR LRFP, if needed
 2. **BAM DIRECTOR**
 1. Enter Funding Adjustment based on note from ASSOC DIR LRFP, if needed
 3. **ASSOC DIR LRFP**
 1. Respond to workflow, change status to **NTP**
17. NTP
1. **PROJECT MANAGER**
 1. Obtain Construction Permits if necessary
 1. At the start of Permit Activity, create a UAL for Building Permit
 2. Enter/update the Activity schedule in AiM
 3. Initiate Internal Work Agreements, as needed
 4. Change status to **CONSTRUCTION**
18. CONSTRUCTION
1. **PROJECT MANAGER**
 1. Maintain Activity Schedule
 2. Process invoices/pay applications
 3. Manage issues/change proposals/change orders
 4. Hold periodic meetings
 5. Conduct periodic Progress Reports/inspections/observations
 6. Project Commissioning if needed (attach in AiM)
 7. At occupancy, create a UAL for Certificate of Occupancy (workflow to EHS)
 8. Final walkthrough with client/project team
 9. Initiate Internal Work Agreements, as needed
 10. Submit work requests, not requiring an IWA, for facility management support
 11. At Substantial Completion, change status to **CONSTR CLOSEOUT**
19. CONSTR CLOSEOUT – *Workflow: Parallel - Unanimous; Go Status: **FINANCIAL CLOSEOUT**; No Go Status: N/A*
1. **PROJECT MANAGER**
 1. Facilitate the distribution of record drawings and as-builts.
 2. Coordinate with Facilities Management to close remaining FM Work Orders
 3. Approve final payments
 2. **PREV MAINT SPECIALIST**
 1. Confirm that asset information has been received in the appropriate format
 2. Manage property/construction warranty information
 3. Manage asset warranty information
 4. Responds to Workflow
 3. **ADMIN ASSOC LRFP**
 1. Process final payments
 2. Closeout LRFP WOs, LRFP and FM IWAs
 3. Reconcile/charge LRFP Fees
 4. Adjust allotment and funding source for project in AiM if there are any remaining funds on the project (adjustment to reduce the allotment and funding source) prior to closing project components
 5. Closeout Project Components
 6. Closeout Contract AFTER reviewing note from ASSOC DIR LRFP approving closing contracts.
 4. **PROJECT AD**
 1. Review final payments, contracts, WOs, IWAs
 2. Review Project Closeout checklist, attach checklist in AiM
 5. **ASSOC DIR LRFP**



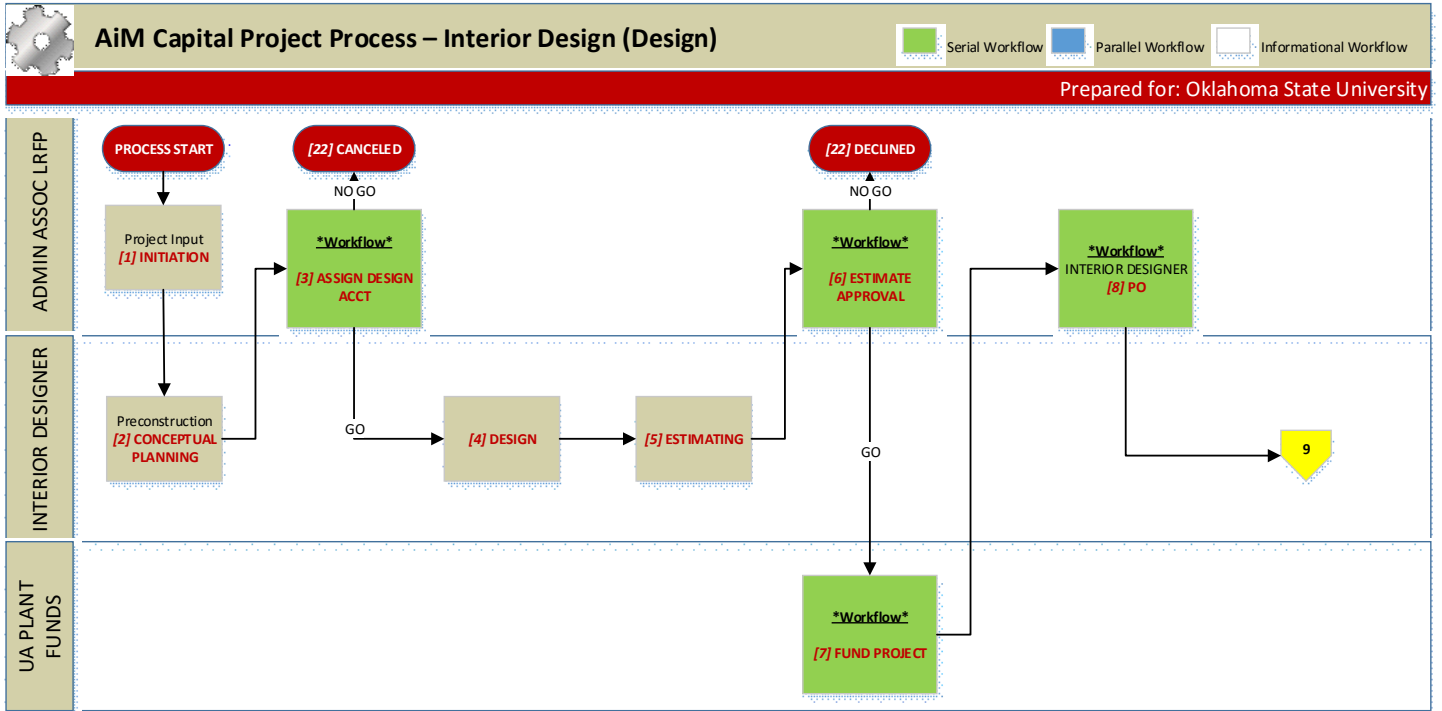
AiM™ CPPM Standard Operation Procedures

1. Final Review
2. Add note approving closing of contracts
3. Respond to Workflow
20. FINANCIAL CLOSEOUT – *Workflow: Serial; Go Status: **PROJECT CLOSEOUT**; No Go Status: N/A*
 1. **ADMIN ASSOC LRF**
 1. Reconcile all final billings
 2. **UA PLANT FUNDS**
 1. Release any remaining encumbrance in FRS
 3. **ASSOC DIR LRF**
 1. Respond to Workflow
21. PROJECT CLOSEOUT
 1. **ADMIN ASSOC LRF**
 1. Send final closeout letter and survey to client
 2. Change status to **CLOSED**

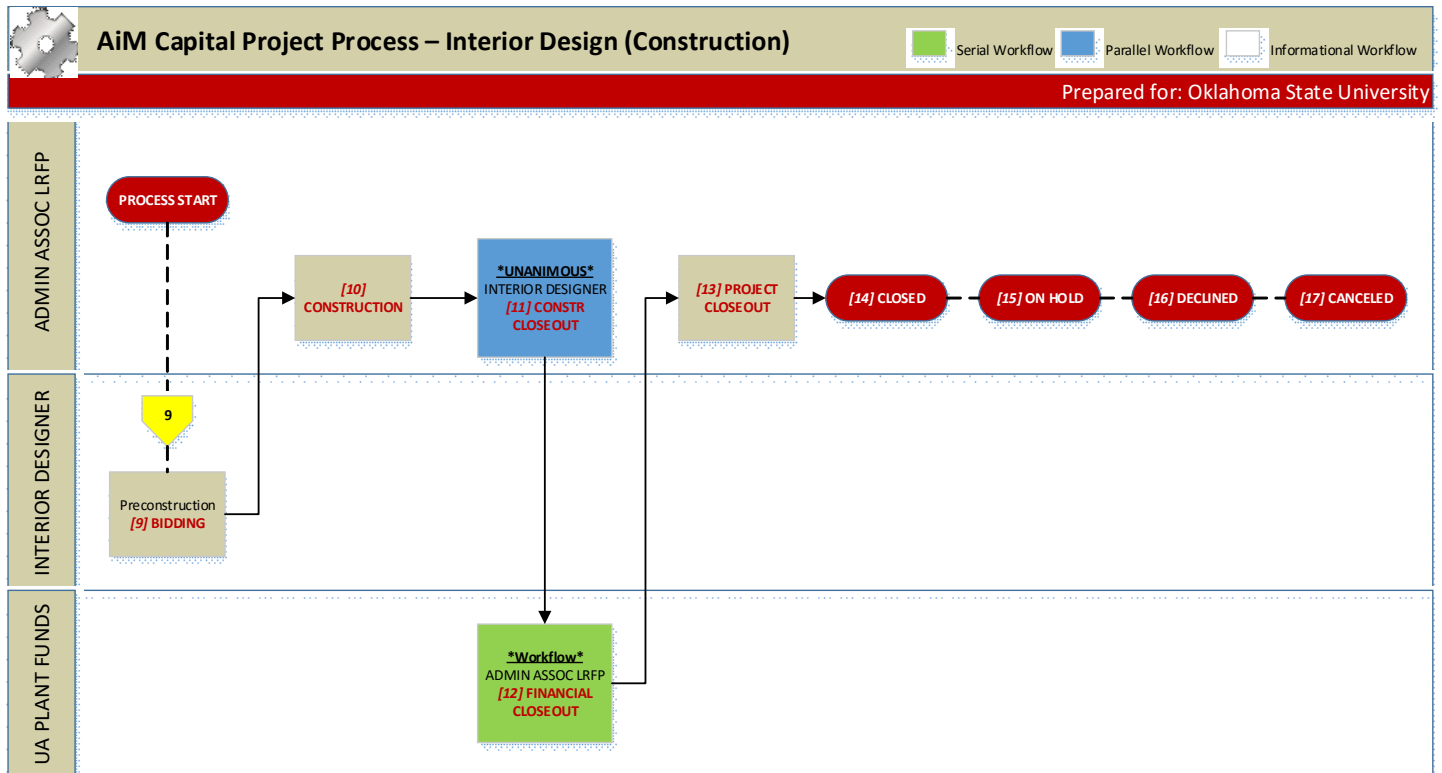
Note: Create Quality Control Reports/project reports
22. CLOSED (VICTORY)
23. ON HOLD
24. DECLINED (CLIENT DRIVEN, VP)
25. CANCELED (INTERNAL)

Capital Project Approval Process – LRFPP Interior Design

PHASE I - DESIGN



PHASE II - CONSTRUCTION



LRFP INTERIOR DESIGN PROCESS DOCUMENTATION

1. INITIATION

1. ADMIN ASSOC LRFP

1. Auto Assign CP Number
2. Description (short)
3. Extra Description – Scope Statement
4. Type – LRFP INTERIOR DESIGN
5. Owner Org
6. Manager = D0214
7. Manager Employee = Interior Designer
8. Update Project Team Interior Designer
9. Update Project Team as appropriate
10. Property if existing building
11. Enter Customer Request Number in UDF
12. Enter Board Approval (Y/N) in UDF
13. UDF for Client Requested Completion if applicable
14. Attach any emails or other documents supplied by the client as related documents
15. Change status to **CONCEPTUAL PLANNING**

2. CONCEPTUAL PLANNING – (Personal Query)

1. INTERIOR DESIGNER

1. Enter client on Responsibility (Note: If client is set up in AiM, enter in Project Team. If client is not set up in AiM, enter in “Other Contacts” section.)
2. Set up client meeting to review requested scope, schedule, budget, etc.
 1. Send email to attendees from AiM CP screen
3. Update Extra Description, Planned Budget (Component Budget), Activity Schedule, etc. as appropriate



AiM™ CPPM Standard Operation Procedures

4. Change status to **ASSIGN DESIGN ACCT**
3. ASSIGN DESIGN ACCT – *Workflow: Serial; Go Status: DESIGN; No Go Status: CANCELED*
 1. **ADMIN ASSOC LRFP**
 1. Contact client for account and funding approval??
 2. If needed add new Account to AiM Account Manager??
 3. Enter account(s) and funding source(s) on CP Account Setup screen
 4. Update Project Team to assign employee to INVOICE ADMIN and INVOICE APPROVER responsibilities
 5. Activate all components
4. DESIGN – *(Personal Query)*
 1. **INTERIOR DESIGNER**
 1. Update Project Team
 2. Schedule design meeting(s)
 3. Maintain Activity Schedule for various design phases
 4. Attach related document for deliverables from various design phases
 5. When Design complete change status to **ESTIMATING**
5. ESTIMATING – *(Personal Query)*
 1. **INTERIOR DESIGNER**
 1. Develop estimate
 2. Attach estimate to project
 3. Change Status to **ESTIMATE APPROVAL**
6. ESTIMATE APPROVAL – *Workflow: Serial; Go Status: FUND PROJECT No Go Status: DECLINED*
 1. **INTERIOR DESIGNER**
 1. Enter/update Project Component Budget
 2. Schedule meeting with client to review estimate
 2. **ADMIN ASSOC LRFP**
 1. If accepted
 1. Enter note with amount needed for project
 2. Respond to workflow
7. FUND PROJECT - *Workflow: Serial; Go Status: PO; No Go Status: N/A*
 1. **UA PLANT FUNDS**
 1. Review account/estimate information in Notes log
 2. Validate or invalidate account
 1. If valid, encumber funds in FRS
 2. If invalid, contact client
 1. Add note
 3. If this project will be capitalized:
 1. If needed add new Account to AiM Account Manager??
 2. If needed add new Funding Source(s) in AiM
 3. Enter account(s) and funding source(s) on CP Account Setup screen
 4. Enter/Increase Account Budget on Capital Project
 5. If needed Enter Funding Transfer in AiM
 4. If not capitalized just respond to workflow
8. PO – *Workflow: Serial; Go Status: BIDDING, No Go Status: CANCELED*
 1. **INTERIOR DESIGNER**
 1. Initiate Requisition Process in OK Corral
 2. Enter requisition number from OKCorral
 3. Respond to Workflow
 2. **ADMIN ASSOC LRFP**
 1. Initiate Internal Work Agreement if in-house work needed (Truck Services, etc.)



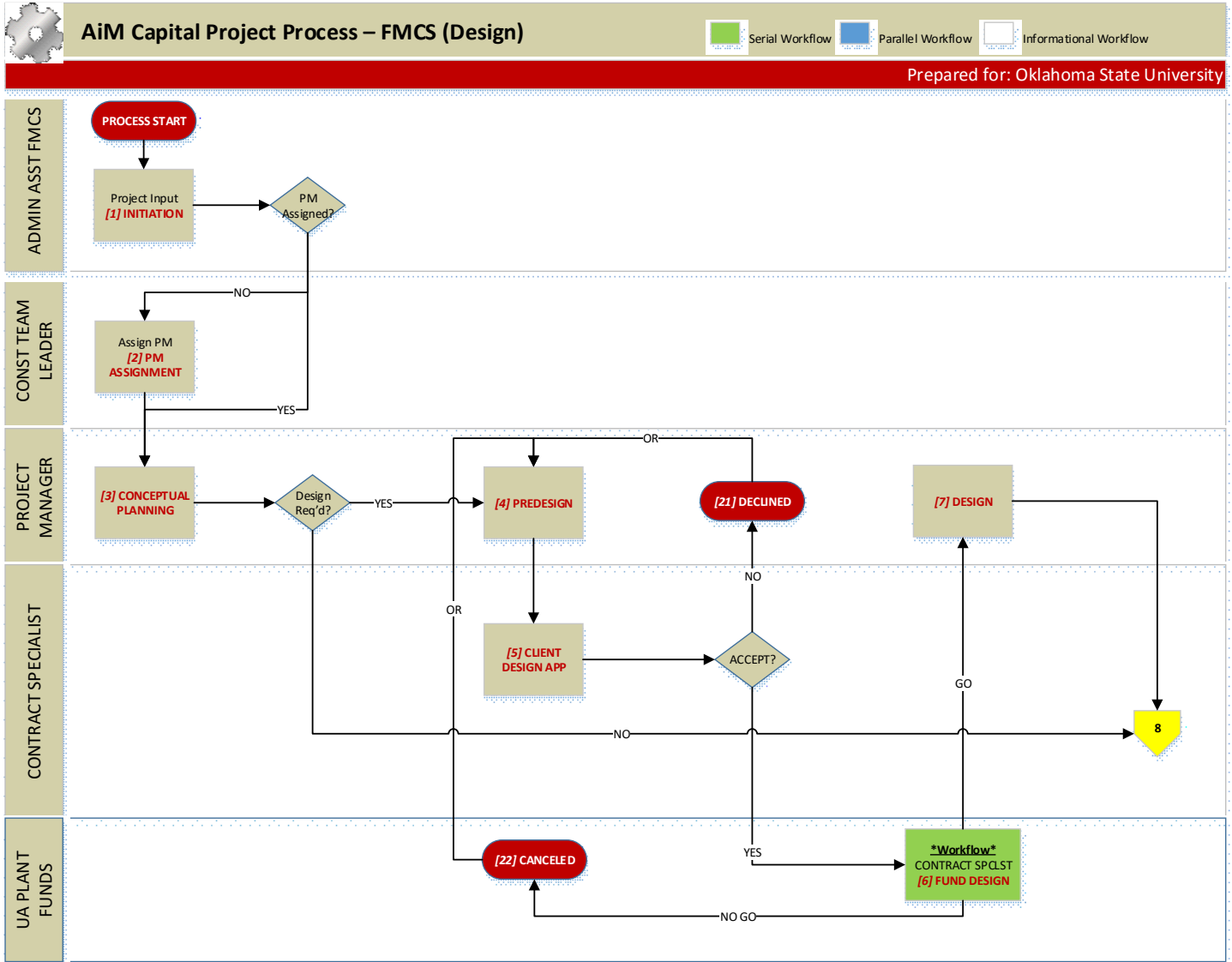
AiM™ CPPM Standard Operation Procedures

2. Routing???
3. Respond To Workflow
9. BIDDING (Personal Query)
 1. **INTERIOR DESIGNER**
 1. Coordinate bidding process with Purchasing
 2. Hold Preconstruction meeting with Project Team (review preconstruction checklist)
 3. Enter/update the Activity schedule in AiM
 4. Award the contract and enter PO from OKCorral
 5. Change status to **CONSTRUCTION**
10. CONSTRUCTION
 1. **INTERIOR DESIGNER**
 1. Maintain Activity Schedule
 2. Hold periodic meetings
 3. Coordinate installation
 4. Final walkthrough with client/project team
 5. At Substantial Completion, change status to **CONSTR CLOSEOUT**
 2. **ADMIN ASSOC LRFP**
 1. Process invoices
 2. Manage changes to PO
11. CONSTR CLOSEOUT – *Workflow: Parallel – Unanimous; Go Status: **FINANCIAL CLOSEOUT**; No Go Status: N/A*
 1. **INTERIOR DESIGNER**
 1. Coordinate completion of Punch List
 2. **ADMIN ASSOC LRFP**
 1. Process final payments
 2. Closeout POs, WOs, IWAs
 3. Adjust allotment and funding source for project in AiM if there are any remaining funds on the project (adjustment to reduce the allotment and funding source) prior to closing project components
 4. Closeout Project Components
12. FINANCIAL CLOSEOUT- *Workflow: Serial; Go Status: **PROJECT CLOSEOUT**; No Go Status: N/A*
 1. **ADMIN ASSOC LRFP**
 1. Ensure final billing has occurred
 2. **UA PLANT FUNDS**
 1. Release any remaining encumbrance in FRS
13. PROJECT CLOSEOUT
 1. **ADMIN ASSOC LRFP**
 1. Send final closeout letter and survey to client
 2. Change status to **CLOSED**

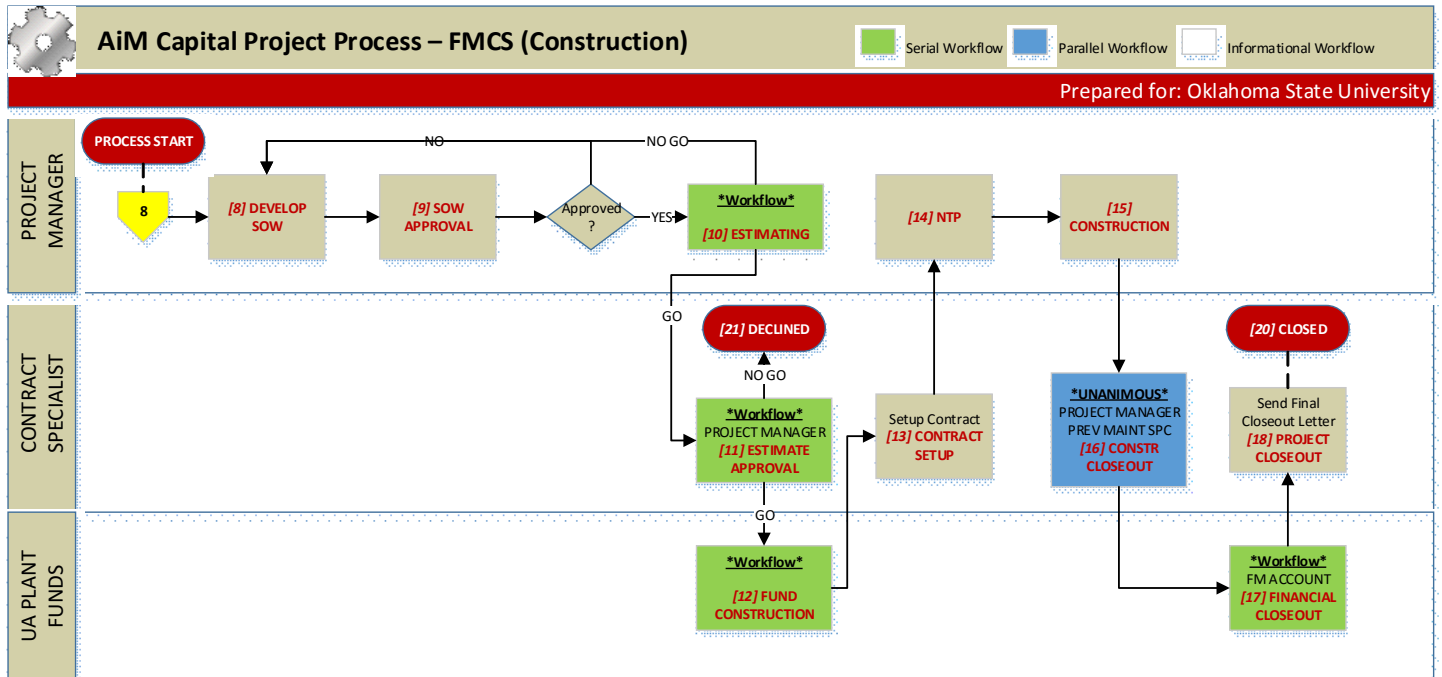
Note: Create Quality Control Reports/project reports
14. CLOSED (VICTORY!)
15. ON HOLD
16. DECLINED (CLIENT DRIVEN)
17. CANCELED (INTERNAL)

Capital Project Approval Process – FMCS

PHASE I - DESIGN



PHASE II - CONSTRUCTION



FMCS PROCESS DOCUMENTATION

1. INITIATION

1. ADMIN ASST FMCS

1. Auto Assign CP Number
2. Description (short)
3. Extra Description – Scope Statement
4. Type – FMCS
5. Owner Org
6. Manager Org = D0522
7. Property if existing building
8. Asset information if appropriate
9. UDF for Client Requested Completion if applicable
10. Enter Board Approval (Y/N) in UDF
11. Enter Customer Request Number in UDF
12. Attach any emails or other documents supplied by the client as related documents
13. Optionally enter PM in Manager Employee field
 1. Change status
 1. **PM ASSIGNMENT** if PM is not yet assigned
 2. **CONCEPTUAL PLANNING** if PM is assigned

2. PM ASSIGNMENT (Personal Query)

1. CONST TEAM LEADER (Personal Query)

1. Review project and update as needed
2. Enter PM in Manager Employee field
3. Change status to **CONCEPTUAL PLANNING**

3. CONCEPTUAL PLANNING – (Personal Query)



AiM™ CPPM Standard Operation Procedures

1. PROJECT MANAGER

1. Enter Project Manager on Project Team Responsibility
2. Enter client on Responsibility (Note: If client is set up in AiM, enter in Project Team. If client is not set up in AiM, enter in "Other Contacts" section.)
3. Set up client meeting to review requested scope, schedule, budget, etc.
 1. Send email to attendees from AiM CP screen
4. Coordinate with CONST TEAM LEADER to determine if design/consultants are needed, method of delivery, and contractor
5. Update Extra Description, Planned Budget, Activity Schedule, etc. as appropriate
6. Update Project Team as appropriate
7. Link Milestones with Activities or Components as appropriate
8. Note: this is iterative until deliver method/contractor(s) are determined and rough scope is defined.
9. Change Status
 1. If Design is required
 1. Determine if Design will be done by LRFP or On-Call Contractor
 2. Contact A&E, EHS, etc.
 3. Add Notes as appropriate
 4. Change status to **PREDESIGN**
 2. If Design is NOT required
 1. Notify Contractor of involvement and attach as related document or send AiM email
 2. Schedule meeting with client, Contractor, EHS, etc. to walk site and determine scope of design
(Note: may want to look at flat rate for this.)
 3. Change status to **DEVELOP SOW**

4. PREDESIGN(*Personal Query*)

1. PROJECT MANAGER

1. Schedule meeting with client, A&E, Contractor, EHS, etc. to walk site and determine scope of design
2. Obtain estimate for design from A&E
3. Attach design estimate from A&E to project (need document type)
4. Develop Design Cost Breakout in Excel and attach to project (need document type)
5. Meet with client to review estimate and discuss alternatives
6. Change status to **CLIENT DESIGN APP**

5. CLIENT DESIGN APP(*Personal Query*)

1. CONTRACT SPECIALIST

1. Contact client for A&E approval and funding
2. If all alternates rejected change status to **DECLINED** or **PREDESIGN**
3. If accepted
 1. Enter Budget Revision for design related component budgets, if needed
 2. Change status to **FUND DESIGN**

6. FUND DESIGN - *Workflow: Serial; Go Status: DESIGN; No Go Status: N/A*

1. CONTRACT SPECIALIST

1. Confirm account and funding supplied by customer
 1. Enter account information and amount requested in CP Notes Log
2. Active appropriate design components
3. If account not provided, coordinate with PROJECT MANAGER and determine whether to give No Go response (cancels project) or change project status to **PREDESIGN**
4. Initiate Consultant Contract process

2. **UA PLANT FUNDS**
 1. Review account information in Notes log
 2. Validate or invalidate account
 1. If valid, encumber funds in FRS
 2. If invalid, contact client
 1. Add note
 3. Enter/update account(s) and funding source(s) on AiM CP
7. DESIGN – *(Personal Query)*
 1. **PROJECT MANAGER**
 1. Update Project Team
 1. Update Project Team to assign employee to INVOICE ADMIN and INVOICE APPROVER responsibilities
 2. Notify Contractor of involvement and attach as related document or send AiM email
 3. Schedule design meeting(s)
 4. Maintain Activity Schedule for various design phases
 5. Attach related document for deliverables from various design phases
 6. For each design phase deliverable, create Universal Action List for Design Review (rf. UAL process)
 7. When Design complete change status to **DEVELOP SOW**
8. DEVELOP SOW *(Personal Query)*
 1. **PROJECT MANAGER**
 1. Create SOW off of design or off walkthrough from conceptual planning
 2. Attach SOW to Project
 3. If unable to provide SOW, enter note on project
 4. Respond to Workflow
9. SOW APPROVAL *(Personal Query)*
 1. **PROJECT MANAGER**
 1. Schedule meeting with client to obtain approval for SOW
 2. If approved, change status to **ESTIMATING**
 3. If not approved, enter note (type SOW REVISIONS) and change status to **DEVELOP SOW**
10. ESTIMATING – *Workflow: Serial; Go Status: ESTIMATE APPROVAL, No Go Status: SOW APPROVAL*
 1. **PROJECT MANAGER**
 1. If in-house, create a customer request directly in AiM to develop estimate and follow standard estimating process in CMMS (external from CPPM)
 2. Attach estimate to project
 3. If unable to provide estimate, enter note on project (can loop in SOW and estimating until scope/estimate nailed down)
 4. Respond to Workflow
11. ESTIMATE APPROVAL – *Workflow: Serial; Go Status: FUND CONSTRUCTION No Go Status: DECLINED*
 1. **PROJECT MANAGER**
 1. Determine if Board Approval is required and update UDF
 2. Enter/update Project Component Budget
Note: Entering estimate from contractor and support costs for entire project, i.e. truck services, custodial, markup, sign shop, etc.
 3. Schedule meeting with client to review estimate
 2. **CONTRACT SPECIALIST**
 1. If accepted
 1. Activate all remaining components
 2. Enter Account information and amount requested by client, for construction in Note Log
 3. Change status to **FUND CONSTRUCTION**



AiM™ CPPM Standard Operation Procedures

12. FUND CONSTRUCTION - *Workflow: Serial; Go Status: **CONTRACT SETUP**; No Go Status: N/A*

1. **UA PLANT FUNDS**

1. Review account/estimate information in Notes log
2. Validate or invalidate account
 1. If valid, encumber funds in FRS
 2. If invalid, contact client
 1. Add note
3. If this project will be capitalized:
 1. If needed add new Account to AiM Account Manager??
 2. If needed add new Funding Source(s) in AiM
 3. Enter account(s) and funding source(s) on CP Account Setup screen
 4. Enter/Increase Account Budget on Capital Project
 5. If needed Enter Funding Transfer in AiM
4. If not capitalized just respond to workflow

13. CONTRACT SETUP

1. **CONTRACT SPECIALIST**

1. Initiate Construction Contract (Construction Contract OCCM)
Note: Include Board Approval date with requisition of PO
2. Initiate Internal Work Agreement if in-house construction (Note: Include this in IWA process at the REQUESTED status)
3. ONCE Construction Contract status of NTP is changed,
4. Change project status to **NTP**

14. NTP (*Personal Query*)

1. **PROJECT MANAGER**

1. Obtain Construction Permits if necessary
 1. At the start of Permit Activity, create a UAL for Building Permit
2. Hold Preconstruction meeting with Project Team (review preconstruction checklist)
3. Issue NTP to start Construction
 1. If in-house set IWA status to NTP
 2. If external issue NTP documents to contractor
4. Enter/update the Activity schedule in AiM
5. Change status to **CONSTRUCTION**

15. CONSTRUCTION (*Personal Query*)

1. **PROJECT MANAGER**

1. Maintain Activity Schedule
2. Process invoices
3. Manage change proposals/change orders
4. Hold periodic meetings
5. Hold periodic Progress Reports/inspections
6. Project Commissioning if needed (found in AiM)
7. At move-in, create a UAL for Certificate of Occupancy (workflow to EHS)
8. Final walkthrough with client/project team
9. At Substantial Completion, change status to **CONSTR CLOSEOUT**

16. CONSTR CLOSEOUT – *Workflow: Parallel – Unanimous; Go Status: **FINANCIAL CLOSEOUT**; No Go Status: N/A*

1. **PROJECT MANAGER**

1. Facilitate the distribution of O&M manuals and as-builts
Note: Determine who is responsible to manage warranty information and enter asset profiles
2. Approve final payments
3. Add note to approve closing contracts



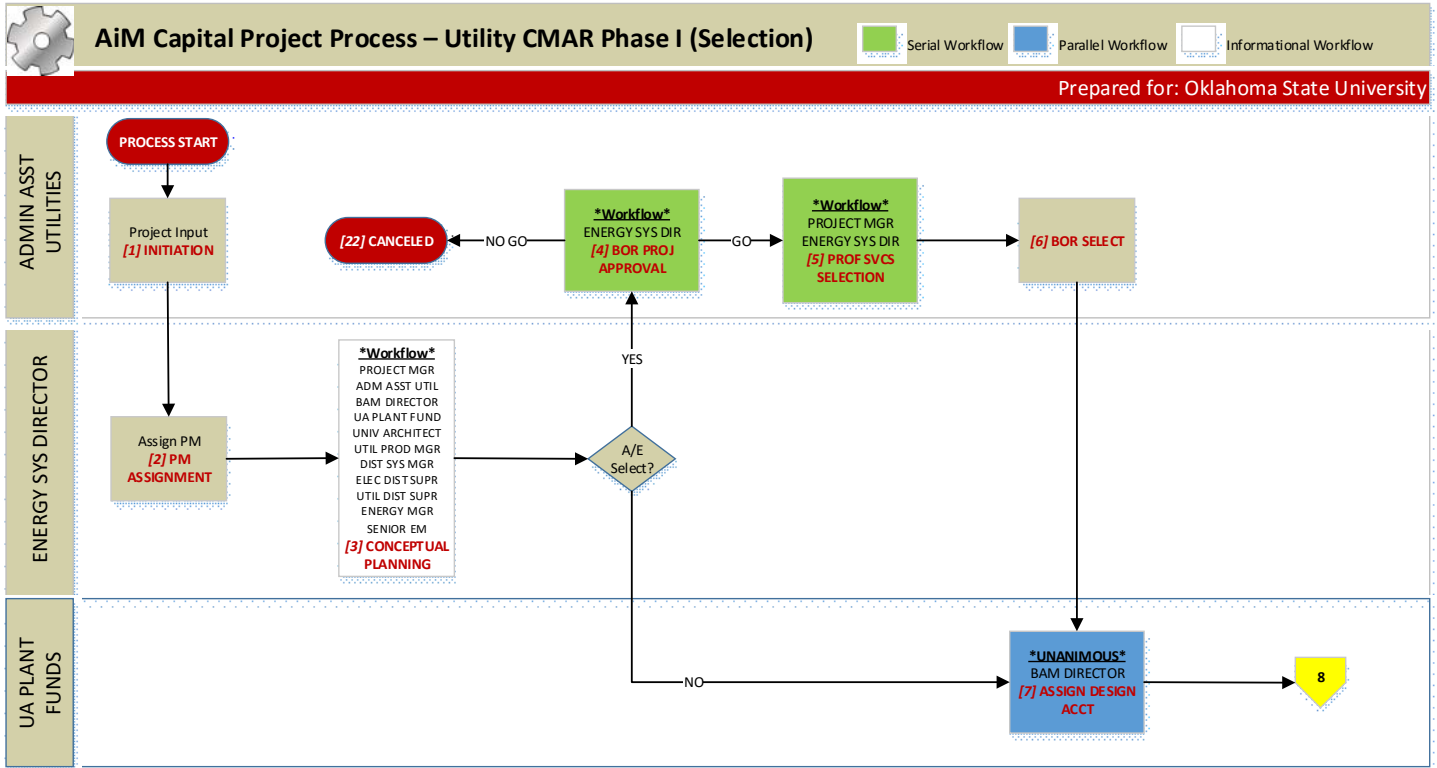
AiM™ CPPM Standard Operation Procedures

4. Respond to Workflow
2. **PREVENTIVE MAINT SPC**
 1. Confirm that asset information has been received in the appropriate format
 2. Manage property/construction warranty information
 3. Manage asset warranty information
 4. Responds to Workflow
3. **CONTRACT SPECIALIST**
 1. Process final payments
 2. Closeout WOs, IWAs
 3. Adjust allotment and funding source for project in AiM if there are any remaining funds on the project (adjustment to reduce the allotment and funding source) prior to closing project components
 4. Closeout Components
 5. Review Project Closeout checklist, attach checklist in AiM
 6. Closeout Contract AFTER reviewing note from PROJECT MANAGER approving closing contracts.
 7. Respond to Workflow
17. FINANCIAL CLOSEOUT- Workflow: Serial; Go Status: Project Closeout, No Go Status: N/A
 1. **FM ACCOUNTING**
 1. Ensure final billing has occurred
 2. **UA PLANT FUNDS**
 1. Release any remaining encumbrance in FRS
18. PROJECT CLOSEOUT
 1. **CONTRACT SPECIALIST**
 1. Send final closeout letter and survey to client
 2. Change status to **CLOSED**

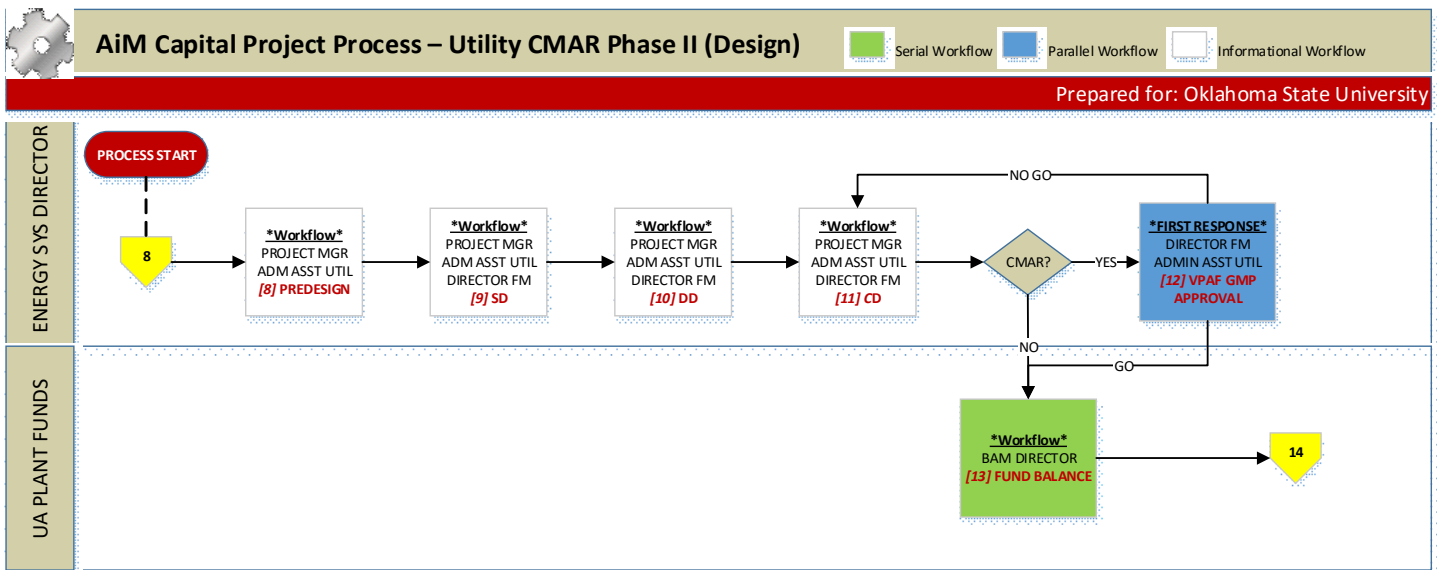
Note: Create Quality Control Reports/project reports
19. CLOSED (VICTORY!)
20. ON HOLD
21. DECLINED (CLIENT DRIVEN)
22. CANCELED (INTERNAL)

Capital Project Approval Process – Utility CMAR

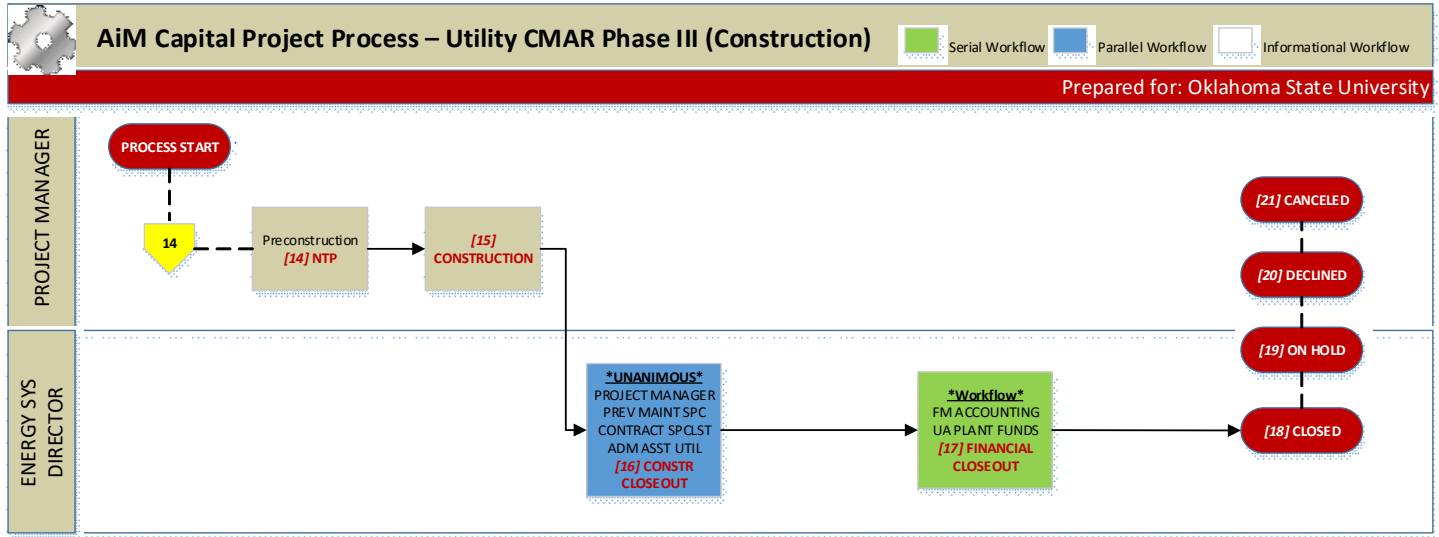
PHASE I - SELECTION



PHASE II - DESIGN



PHASE III - CONSTRUCTION



CMAR UTILITIES PROCESS DOCUMENTATION

1. INITIATION

1. ADMIN ASST UTILITIES

1. Auto Assign CP Number
2. Description (short)
3. Extra Description – Scope Statement
4. Type – UTILITIES
5. Owner Org
6. Manager Org = D0517
7. Property using UTILITIES TILE # or use INFRASTRUCTURE if it crosses tiles
8. Enter Customer Request Number in UDF
9. Enter Board Approval (Y/N) in UDF
10. UDF for Completion Need Date
11. UDF for Utilities Included in Project
12. Attach any emails or other documents supplied as related documents
13. Change status to **PM ASSIGNMENT**

2. PM ASSIGNMENT

1. ENERGY SYS DIRECTOR (Personal Query)

1. Review project and update as needed
2. Enter PM in Manager Employee field
3. Enter Project Manager on Project Team Responsibility
4. Change status to **CONCEPTUAL PLANNING**

3. CONCEPTUAL PLANNING – Workflow: Informational only

1. PROJECT MANAGER

1. Set up meeting to review requested scope, schedule, budget, etc.
 1. Send email to attendees from AiM CP screen
2. Update Extra Description, Planned Budget, Activity Schedule, etc. as appropriate
3. Develop Project Components
4. Enter project component budgets
5. Update UDF for Completion Need Date



AiM™ CPPM Standard Operation Procedures

6. Update Project Team as appropriate
7. Note: this is iterative until deliver method/contractor(s) are determined and rough scope is defined.
8. Coordinate project scope with Energy SYS DIRECTOR
2. **ADMIN ASST UTILITIES**
 1. Attach any emails or other documents supplied as related documents
3. **BAM DIRECTOR**
4. **UA PLANT FUNDS**
5. **UNIVERSITY ARCHITECT**
6. **UTIL PRODUCTION MGR**
7. **DISTRIBUTION SYS MGR**
8. **ELECTRICAL DIST SUPER**
9. **UTILITIES DIST SUPER**
10. **SENIOR EM**
11. **ENERGY SYS DIRECTOR**
 1. If Design will be done by A/E selection
 1. change status to **BOR PROJ APPROVAL**,
 2. If Design will not be done by A/E selection
 1. Enter note requesting account and amount for design.
 2. Change status to **ASSIGN DESIGN ACCT**
4. **BOR PROJ APPROVAL - Workflow: Serial; Go Status: **PROF SVCS SELECTION**; No Go Status: **CANCELED****
 1. **ENERGY SYS DIRECTOR**
 1. Draft Board Items
 2. Draft Board Supporting Documentation
 2. **ADMIN ASST UTILITIES**
 1. Submit Board Items via AIRS
 2. Enter/Update Activity planned dates related to Board Approval
 3. Attach any emails or other documents supplied as related documents
 4. Upon Board Approval, attach Board Book PDF as related document
 5. Response:
 1. Respond to Workflow (Go or No Go)
5. **PROF SVCS SELECTION – Workflow: Serial; Go Status: **BOR SELECT**; No Go Status: N/A**
 1. **PROJECT MANAGER**
 1. Solicit, interview, summarize (A&E, CMAR)
 2. **ENERGY SYS DIRECTOR**
 1. Draft Board Items
 2. Draft Board Supporting Documentation
 3. **ADMIN ASST UTILITIES**
 1. Submit Board Agenda Item in AIRS
 2. Attach Board Documents to the Capital Project
 3. Enter/Update Activity planned dates related to Board Approval
 4. Attach any emails or other documents supplied as related documents
 1. Respond to Workflow (Go or No Go)
6. **BOR SELECT**
 1. **ADMIN ASST UTILITIES**
 1. Attach Board Book PDF as related document
 2. Enter/Update Activity actual dates related to Board Approval
 3. Enter note requesting account and amount for design.
 4. When Board approval obtained, change status to **ASSIGN DESIGN ACCT** (Do not activate any components.)



AiM™ CPPM Standard Operation Procedures

7. ASSIGN DESIGN ACCT – *Workflow: Parallel – Unanimous; Go Status: **PREDESIGN**; No Go Status: N/A*
(Personal Query based on # of days in Status)
 1. **BAM DIRECTOR**
 1. Review Enter Funding Groups and Funding Sources
 2. **UA PLANT FUNDS**
 1. Enter Funding Groups and Funding Sources
 2. Enter Accounts
8. PREDESIGN - *Workflow: Informational Only*
 1. **PROJECT MANAGER**
 1. Update Project Team to assign employee to INVOICE ADMIN and INVOICE APPROVER responsibilities
 2. If On-Call A&E:
 1. Schedule meeting with A&E to determine scope of design
 2. Obtain estimate and scope of design from A&E
 3. Update component budgets
 4. Add related documents
 5. Update activity schedule
 6. Initiate On Call A&E – Consultant Contract Process
 2. **ADMIN ASST UTILITIES**
 1. Attach any emails or other documents supplied as related documents
 2. Assist Energy Sys Director with Contracts
 3. **ENERGY SYS DIRECTOR**
 1. Activate ALL Components
 2. Prepare Contract Documents
 3. If A&E Selection – Consultant Contract Process
 4. If CMAR – Construction Contract Process
 5. Change Status to **SD**
9. SD – *Workflow: Informational Only*
 1. **PROJECT MANAGER**
 1. UAL for Design Review(s) as appropriate
 2. **ADMIN ASST UTILITIES**
 3. **DIRECTOR FM**
 4. **ENERGY SYS DIRECTOR**
 1. When SD accepted, change status to **DD**
10. DD - *Workflow: Informational Only*
 1. **PROJECT MANAGER**
 1. UAL for Design Review(s) as appropriate
 2. **ADMIN ASST UTILITIES**
 3. **DIRECTOR FM**
 4. **ENERGY SYS DIRECTOR**
 1. When DD accepted, change status to **CD**
11. CD - *Workflow: Informational Only*
 1. **PROJECT MANAGER**
 1. UAL for Design Review(s) as appropriate
 2. **ADMIN ASST UTILITIES**
 3. **DIRECTOR FM**
 4. **ENERGY SYS DIRECTOR**
 1. When CD accepted, change status to **VPAF GMP APPROVAL**,
12. VPAF GMP APPROVAL - *Workflow: Parallel - First Response; Go Status: **FUND BALANCE**; No Go Status: **CD***
 1. **DIRECTOR FM**

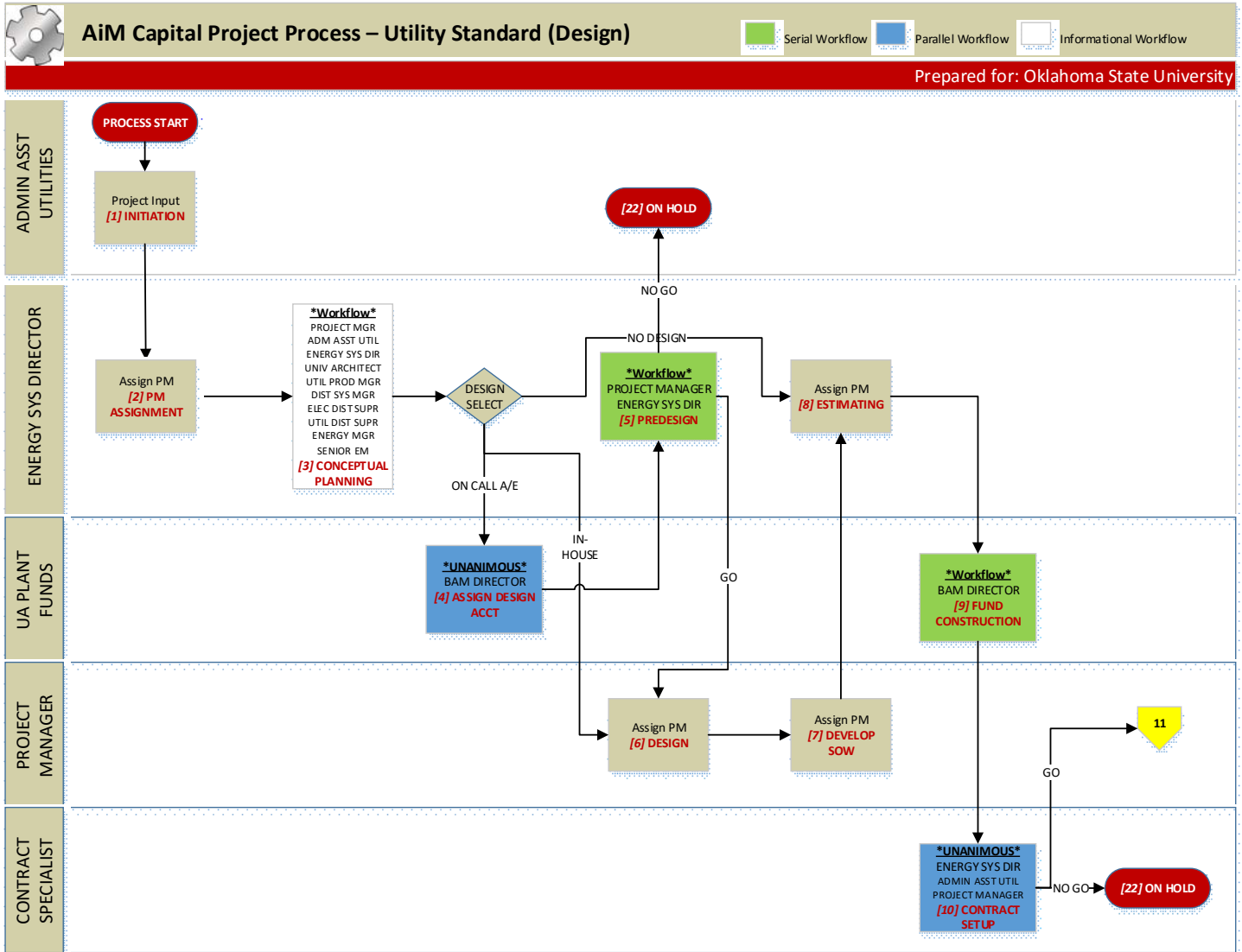
2. **ADMIN ASST UTILITIES**
3. **ENERGY SYS DIRECTOR**
 1. Coordinate approval with VPAF, Director FM
 1. Enter note with amount needed to fund remaining balance of project
 2. Initiate Amendment (Construction Change Order) for CMAR Contract
 2. Response:
 1. Respond to Workflow (Go or No Go)
13. **FUND BALANCE – Workflow: Serial; Go Status: **NTP**; No Go Status: N/A**
(Personal Query based on # of days in Status)
 1. **UA PLANT FUNDS**
 1. Enter Funding Adjustment based on note from ENERGY SYS DIRECTOR, if needed
 2. **BAM DIRECTOR**
 1. Enter Funding Adjustment based on note from ENERGY SYS DIRECTOR, if needed
14. **NTP**
 1. **PROJECT MANAGER**
 1. Obtain Construction Permits if necessary
 1. At the start of Permit Activity, create a UAL for Building Permit
 2. Hold Preconstruction meeting with Project Team (review preconstruction checklist)
 3. Enter/update the Activity schedule in AiM
 4. Change status to **CONSTRUCTION**
15. **CONSTRUCTION**
 1. **PROJECT MANAGER**
 1. Maintain Activity Schedule
 2. Process invoices/pay applications
 3. Manage issues/change proposals/change orders
 4. Hold periodic meetings
 5. Conduct periodic Progress Reports/inspections/observations
 6. Project Commissioning if needed (attach in AiM)
 7. At occupancy, create a UAL for Certificate of Occupancy (workflow to EHS)
 8. Final walkthrough with client/project team
 9. Initiate Internal Work Agreements, as needed
 10. Submit work requests, not requiring an IWA, for facility management support
 11. At Substantial Completion, change status to **CONSTR CLOSEOUT**
16. **CONSTR CLOSEOUT – Workflow: Parallel - Unanimous; Go Status: **WARRANTY**; No Go Status: N/A**
 1. **PROJECT MANAGER**
 1. Facilitate the distribution of record manuals, O&Ms and as builts.
 2. Coordinate with Facilities Management to close remaining FM Work Orders
 3. Approve final payments
 2. **PREVENTIVE MAIN SPC**
 1. Confirm that asset information has been received in the appropriate format
 2. Manage property/construction warranty information
 3. Manage asset warranty information
 4. Responds to Workflow
 3. **CONTRACT SPECIALIST**
 1. Process final payments
 2. LRFPP WOs, LRFPP and FM IWAs
 3. Closeout contracts after reviewing note from ENERGY SYS DIRECTOR
 4. Reconcile/charge LRFPP Fees
 5. Adjust allotment and funding source for project in AiM if there are any remaining funds on the project (adjustment to reduce the allotment and funding source) prior to closing project components



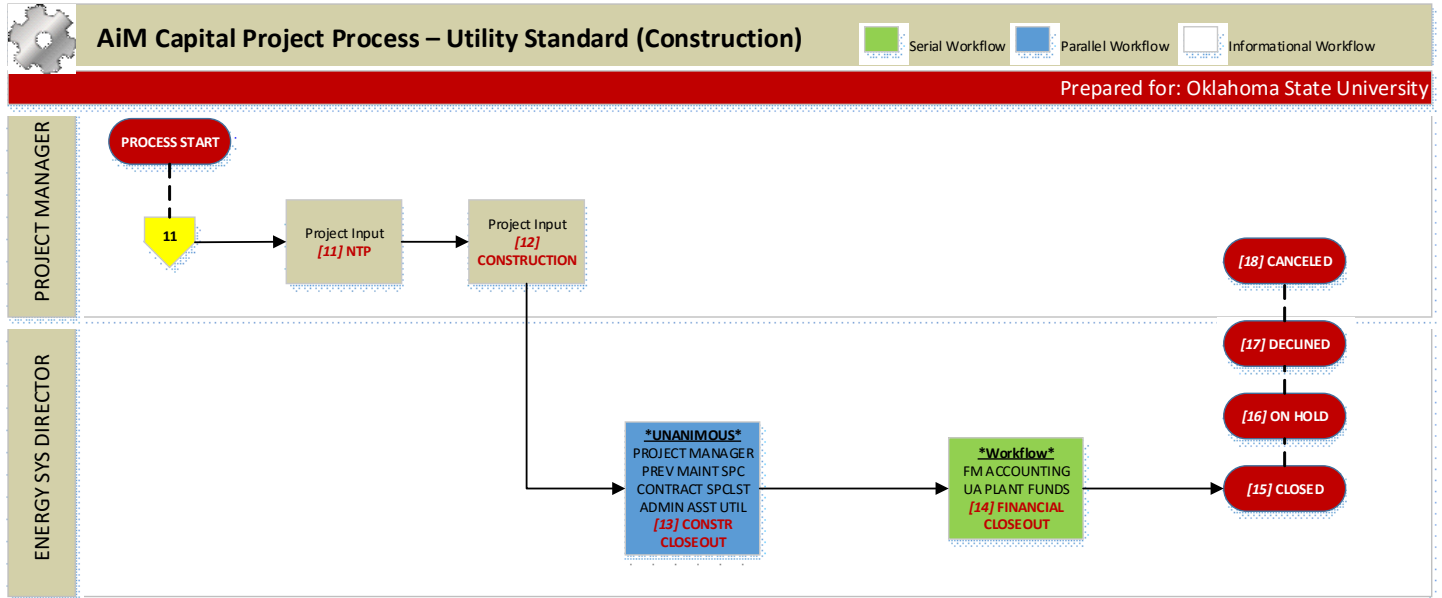
- 6. Closeout Project Components
- 4. **ADMIN ASST UTILITIES**
 - 1. Review final payments, contracts, WOs, IWAs
 - 2. Review Project Closeout checklist, attach checklist in AiM
- 5. **ENERGY SYS DIRECTOR**
 - 1. Final Review
 - 2. Enter Note to closeout contracts
 - 3. Respond to Workflow
- 17. FINANCIAL CLOSEOUT – *Workflow: Serial; Go Status: **CLOSED**; No Go Status: N/A*
 - 1. **FM ACCOUNTING**
 - 1. Reconcile all final billings
 - 2. **UA PLANT FUNDS**
 - 1. Release any remaining encumbrance in FRS
 - 3. **ENERGY SYS DIRECTOR**
 - 1. Respond to Workflow
- 18. CLOSED (VICTORY)
- 19. ON HOLD
- 20. DECLINED (CLIENT DRIVEN, VP)
- 21. CANCELED (INTERNAL)

Capital Project Approval Process – Utility Standard

PHASE I - DESIGN



PHASE II – CONSTRUCTION



STANDARD UTILITIES PROCESS DOCUMENTATION

1. INITIATION

1. ADMIN ASST UTILITIES

1. Auto Assign CP Number
2. Description (short)
3. Extra Description – Scope Statement
4. Type – STANDARD UTILITIES
5. Owner Org
6. Manager Org = D0517
7. Property using Building, UTILITIES TILE # or use INFRASTRUCTURE if it crosses tiles
8. Enter Customer Request Number in UDF
9. Enter Board Approval (Y/N) in UDF
10. UDF for Utilities Included in Project
11. UDF for Energy (Y/N)
12. Attach any emails or other documents supplied as related documents
13. Change status to **PM ASSIGNMENT**

2. PM ASSIGNMENT

1. ENERGY SYS DIRECTOR (Personal Query)

1. Review project and update as needed
2. Enter PM in Manager Employee field
3. Enter Project Manager on Project Team Responsibility
4. Change status to **CONCEPTUAL PLANNING**

3. CONCEPTUAL PLANNING – *Workflow: Informational only*

1. PROJECT MANAGER

1. Set up meeting to review requested scope, schedule, budget, etc.
 1. Send email to attendees from AiM CP screen
2. Update Extra Description, Planned Budget, Activity Schedule, etc. as appropriate
3. Develop Project Components

4. Link Milestones with Activities or Components as appropriate
5. Enter project component budgets
6. Update UDF for Completion Need Date
7. Update Project Team as appropriate
8. Note: this is iterative until deliver method/contractor(s) are determined and rough scope is defined.
9. Coordinate project scope with Energy SYS DIRECTOR
2. **ADMIN ASST UTILITIES**
 1. Attach any emails or other documents supplied as related documents
 2. Enter note requesting account and amount for design
3. **UNIVERSITY ARCHITECT**
4. **UTIL PRODUCTION MGR**
5. **DISTRIBUTION SYS MGR**
6. **ELECTRICAL DIST SUP**
7. **UTILITIES DIST SUPER**
8. **SENIOR EM**
9. **ENERGY SYS DIRECTOR**
 1. Activates required components
 2. Change Status to
 1. If Design is done by on call A/E firm change status to **ASSIGN DESIGN ACCT**
 2. If Design is done in house change status to **DESIGN**
 3. For Energy Savings Performance Contract, change status to **DESIGN**
 4. If Design is NOT required
 1. Change status to **ESTIMATING**
4. **ASSIGN DESIGN ACCT** – *Workflow: Parallel – Unanimous; Go Status: **PREDESIGN**; No Go Status: N/A*
(*Personal Query based on # of days in Status*)
 1. **BAM DIRECTOR**
 1. Review Enter Funding Groups and Funding Sources
 2. **UA PLANT FUNDS**
 1. Enter Funding Groups and Funding Sources
 2. Enter accounts in AiM
 3. Encumber accounts in FRS
5. **PREDESIGN: Workflow: Workflow: Serial: Go Status: **DESIGN**; No Go Status: **ON HOLD****
 1. **PROJECT MANAGER**
 1. For On-Call A&E:
 1. Schedule meeting with A&E to determine scope of design
 2. Obtain estimate and scope of design from A&E
 3. Update component budgets
 4. Add related documents
 5. Update activity schedule
 2. **ENERGY SYS DIRECTOR**
 1. Reviews scope and estimate
 2. Respond to Workflow (Go or No Go)
6. **DESIGN** – (Personal Query)
 1. **PROJECT MANAGER**
 1. Initiate On Call A&E – Consultant Contract Process
 2. For Energy Savings Performance Contract, Initiate Construction Contract – ENERGY SPC
 1. At FIM REVIEW, change project status to **ESTIMATING**
 3. Update Project Team

1. Update Project Team to assign employee to INVOICE ADMIN and INVOICE APPROVER responsibilities
4. Schedule design meeting(s)
5. Maintain Activity Schedule for various design phases
6. Attach related document for deliverables from various design phases
7. For each design phase deliverable, create Universal Action List for Design Review (rf. UAL process)
8. When Design complete change status to **DEVELOP SOW**
7. DEVELOP SOW – *(Personal Query)*
 1. **PROJECT MANAGER**
 1. Attach SOW to Project
 2. If unable to provide SOW, enter note on project
 3. Change Status to **ESTIMATING**
8. ESTIMATING – *(Personal Query)*
 1. **PROJECT MANAGER**
 1. If in-house, create a work order to develop estimate (external from CPPM)
 2. Update remaining in-active project component budgets
 3. Attach estimate to project
 2. **ENERGY SYS DIRECTOR**
 1. Reviews scope and estimate
 2. Activates Remaining Components
 3. If estimate accepted
 1. Enter note with amount needed to fund construction (include whether account needs to be created or adjusted)
 2. change status to **FUND CONSTRUCTION**
 1. Also, at GENERATE CONTRACT status of Construction Contract – ENERGY SPC
 4. If estimate rejected, change status to appropriate level of planning or design
9. FUND CONSTRUCTION - *Workflow: Serial, Go Status: **CONTRACT SETUP**; No Go Status: N/A*
 1. **BAM DIRECTOR**
 1. Enter Funding Groups and Funding Sources
 2. If account was created for Design
 1. Enter Funding Adjustment based on note from ENERGY SYS DIRECTOR, if needed
 2. **UA PLANT FUNDS**
 1. If account was not created for Design
 1. Enter Funding Groups and Funding Sources
 2. Enter accounts in AiM
 3. Encumber accounts in FRS
 2. If account was created for Design
 1. Enter Funding Adjustment based on note from ENERGY SYS DIRECTOR, if needed
 3. If this project will be capitalized:
 1. If needed add new Account to AiM Account Manager??
 2. If needed add new Funding Source(s) in AiM
 3. Enter account(s) and funding source(s) on CP Account Setup screen
 4. Enter/Increase Account Budget on Capital Project
 5. If needed Enter Funding Transfer in AiM
 4. If not capitalized just respond to workflow
10. CONTRACT SETUP – *Workflow: Parallel - Unanimous, Go Status: **NTP**; No Go Status: **ON HOLD***
 1. **ENERGY SYS DIRECTOR**



AiM™ CPPM Standard Operation Procedures

1. If Board Approval required, draft item for agenda
 2. E-mails board item to Purchasing Director for inclusion in purchasing items
 2. **ADMIN ASST UTILITIES**
 1. Attach Board Book PDF as related document
 3. **PROJECT MANAGER**
 1. Submits design drawings and specifications to contract specialist
 4. **CONTRACT SPECIALIST**
 1. Initiate Construction Contract process (Note: Include Board Approval and PO in contract process definition)
 1. EXECUTE CONTRACT status of Construction Contract – ENERGY SPC
 2. Initiate Internal Work Agreement(s) for any in house work required for project
 3. Responds to workflow once Construction Contract status of NTP is changed,
11. NTP (*Personal Query*)
1. **PROJECT MANAGER**
 1. Obtain Construction Permits if necessary
 1. At the start of Permit Activity, create a UAL for Building Permit
 2. Hold Preconstruction meeting with Project Team (review preconstruction checklist)
 3. Enter/update the Activity schedule in AiM
 4. For in house work, monitor Internal Work Agreement for NTP status
 5. Change status to **CONSTRUCTION**
12. CONSTRUCTION (*Personal Query*)
1. **PROJECT MANAGER**
 1. Maintain Activity Schedule
 2. Process invoices/pay applications
 3. Manage issues/change proposals/change orders
 4. Hold periodic meetings
 5. Conduct periodic Progress Reports/inspections/observations
 6. Project Commissioning if needed (attach in AiM)
 7. At occupancy, create a UAL for Certificate of Occupancy (workflow to EHS)
 8. Final walkthrough with client/project team
 9. Initiate Internal Work Agreements, as needed
 10. Submit work requests, not requiring an IWA, for facility management support
 11. At Substantial Completion, change status to **CONSTR CLOSEOUT**
13. CONSTR CLOSEOUT – *Workflow: Parallel - Unanimous; Go Status: FINANCIAL CLOSEOUT; No Go Status: N/A*
1. **PROJECT MANAGER**
 1. Facilitate the distribution of record drawings, O&M Manuals, and as built.
 2. Coordinate with Facilities Management to close remaining FM Work Orders
 3. If Energy SPC construction contract, monitor M&V process until M&V complete. At end of M&V Change Status to **FINANCIAL CLOSEOUT.**
 4. Approve final payments
 2. **PREVENTIVE MAIN SPC**
 1. Confirm that asset information has been received in the appropriate format
 2. Manage property/construction warranty information
 3. Manage asset warranty information
 4. Responds to Workflow
 3. **CONTRACT SPECIALIST**
 1. Process final payments
 2. Closeout FM WOs, LRFP and FM IWAs
 3. Reconcile/charge LRFP Fees

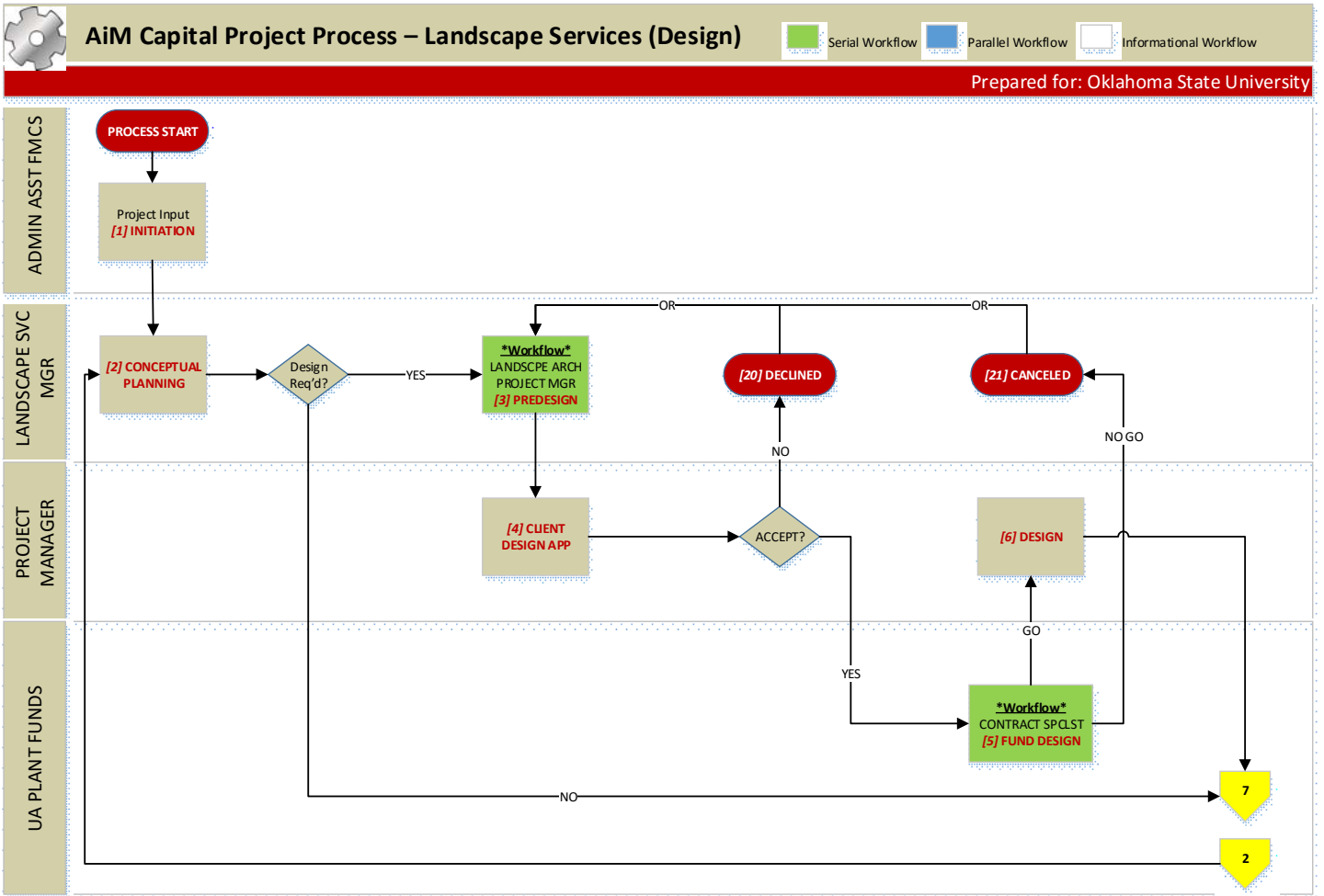


AiM™ CPPM Standard Operation Procedures

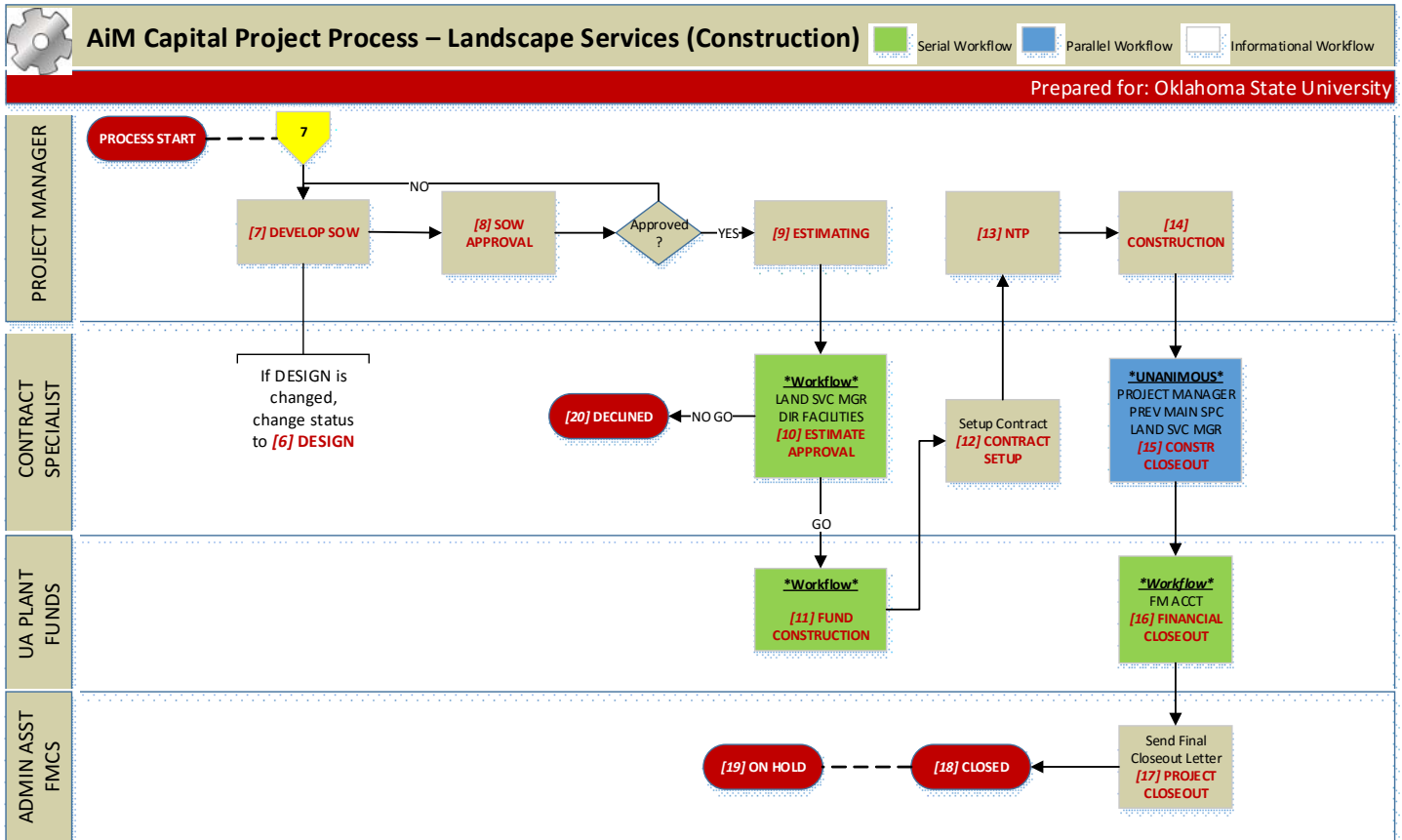
4. Adjust allotment and funding source for project in AiM if there are any remaining funds on the project (adjustment to reduce the allotment and funding source) prior to closing project components
5. Closeout Project Components
6. Closeout Contract AFTER reviewing note from ENERGY SYS DIRECTOR approving closing contracts.
4. **ADMIN ASST UTILITIES**
 1. Review final payments, contracts, WOs, IWAs
 2. Review Project Closeout checklist, attach checklist in AiM
5. **ENERGY SYS DIRECTOR**
 1. Final Review
 2. Enter note to approve closing contracts
 3. Respond to Workflow
14. FINANCIAL CLOSEOUT – *Workflow: Serial; Go Status: **CLOSED**; No Go Status: N/A*
 1. **FM ACCOUNTING**
 1. Reconcile all final billings
 2. **UA PLANT FUNDS**
 1. Release any remaining encumbrance in FRS
 3. **ENERGY SYS DIRECTOR**
 1. Respond to Workflow
15. CLOSED (VICTORY)
16. ON HOLD
17. DECLINED (CLIENT DRIVEN, VP)
18. CANCELED (INTERNAL)

Capital Project Approval Process – Landscape Services

PHASE I - DESIGN



PHASE II – CONSTRUCTION



LANDSCAPE SERVICES PROCESS DOCUMENTATION

1. INITIATION

1. ADMIN ASST FMCS

1. Auto Assign CP Number
2. Description (short)
3. Extra Description – Scope Statement
4. Type – LANDSCAPE SERVICES
5. Owner Org
6. Manager Org = D0581
7. Asset information if appropriate
8. UDF for Client Requested Completion if applicable
9. Enter Customer Request Number in UDF
10. Enter Board Approval (Y/N) in UDF
11. Attach any emails or other documents supplied by the client as related documents
12. Optionally enter PM in Manager Employee field
 1. Change status

1. CONCEPTUAL PLANNING

2. CONCEPTUAL PLANNING – (Personal Query)

1. LANDSCAPE SVC MGR

1. Enter Property Information
 1. Region: OSU-Stillwater
 2. Facility: GROUNDSHDSCP

3. Property: choose appropriate zone and area
 1. Search description to find if needed
 2. Enter client on Responsibility (Note: If client is set up in AiM, enter in Project Team. If client is not set up in AiM, enter in "Other Contacts" section.)
 3. Set up client meeting to review requested scope, schedule, budget, etc.
 1. Send email to attendees from AiM CP screen
 4. Coordinate with CONST TEAM LEADER to determine if design/consultants are needed, method of delivery, and contractor
 5. Update Extra Description, Planned Budget, Activity Schedule, etc. as appropriate
 6. Update Project Team as appropriate
 7. Link Milestones with Activities or Components as appropriate
 8. Note: this is iterative until deliver method/contractor(s) are determined and rough scope is defined.
 9. Change Status
 1. If Design is required
 1. Change status to **PREDESIGN**
 2. Activate FEES component if ready, if not wait until FUND DESIGN STATUS
 2. If Design is NOT required
 1. Enter Project Manager on Project Team Responsibility Change status to **DEVELOP SOW**
 2. Activate necessary components if ready
3. **PREDESIGN - Workflow: Serial; Go Status: *CLIENT DESIGN APP*; No Go Status: *N/A***
 1. **LANDSCAPE ARCH**
 1. Determine if Design will be done by LRFP, In House, or On-Call Contractor
 2. Enter PM in Manager Employee field
 2. **PROJECT MANAGER**
 1. Schedule meeting with client, A&E, Contractor, EHS, etc. to walk site and determine scope of design
 2. Obtain estimate for design from A&E
 3. Attach design estimate from A&E to project (need document type)
 4. Develop Design Cost Breakout in Excel and attach to project (need document type)
 5. Meet with client to review estimate and discuss alternatives
 3. **LANDSCAPE SVC MGR**
 1. Review and approve
 2. Respond to workflow
4. **CLIENT DESIGN APP**
 1. **PROJECT MANAGER**
 1. Contact client for A&E approval and funding
 2. If all alternates rejected change status to **DECLINED** or **PREDESIGN**
 3. If accepted
 1. Enter Budget Revision for design related component budgets, if needed
 2. Change status to **FUND DESIGN**
5. **FUND DESIGN - Workflow: Serial; Go Status: *DESIGN*; No Go Status: *CANCELED***
 1. **CONTRACT SPECIALIST**
 1. Contact client for account and funding approval??
 2. Active appropriate design components
 3. If account not provided, coordinate with PROJECT MANAGER and determine whether to give No Go response (cancels project) or change project status to **PREDESIGN**
 4. Initiate Consultant Contract process
 5. Enter account information and amount requested in CP Notes Log



AiM™ CPPM Standard Operation Procedures

2. **UA PLANT FUNDS**
 1. Review account information in Notes log
 2. Validate or invalidate account
 1. If valid, encumber funds in FRS
 2. If invalid, contact client
 1. Add note
 3. Enter/update account(s) and funding source(s) on AiM CP
6. DESIGN – *(Personal Query)*
 1. **PROJECT MANAGER**
 1. Update Project Team
 2. Notify Contractor of involvement and attach as related document or send AiM email
 3. Schedule design meeting(s)
 4. Maintain Activity Schedule for various design phases
 5. Attach related document for deliverables from various design phases
 6. For each design phase deliverable, create Universal Action List for Design Review (rf. UAL process)
 7. When Design complete change status to **DEVELOP SOW**
7. DEVELOP SOW – *(Personal Query)*
 1. **PROJECT MANAGER**
 1. If design wasn't required
 1. Notify Contractor of involvement, if needed, and attach as related document or send AiM email
 2. Schedule meeting with client, Contractor, EHS, etc. to walk site and determine scope of design
 2. Update Project Team to assign employee to INVOICE ADMIN and INVOICE APPROVER responsibilities
 3. Attach SOW to Project
 4. If unable to provide SOW, enter note on project
 5. If design is changed, change status to **DESIGN**
 6. If no design change, change status to **SOW APPROVAL**
8. SOW APPROVAL
 1. **PROJECT MANAGER**
 1. Schedule meeting with client to obtain approval for SOW
 2. If approved, change status to **ESTIMATING**
 3. If not approved, enter note (type SOW REVISIONS) and change status to **DEVELOP SOW**
9. ESTIMATING – *(Personal Query)*
 1. **PROJECT MANAGER**
 1. If in-house, create a work order to develop estimate (external from CPPM)
 2. Attach estimate to project
 3. If unable to provide estimate, enter note on project
 4. Change status to **ESTIMATE APPROVAL**
10. ESTIMATE APPROVAL – *Workflow: Serial; Go Status: **FUND CONSTRUCTION**; No Go Status: **DECLINED***
 1. **LANDSCAPE SVC MGR**
 1. Determine if Board Approval is required and update UDF
 2. Enter/update Project Component Budget

Note: Entering estimate from contractor and support costs for entire project, i.e. truck services, custodial, markup, sign shop, etc.

 3. Schedule meeting with client to review estimate
 2. **DIRECTOR FACILITIES**
 1. If Board Approval required, draft item for agenda



AiM™ CPPM Standard Operation Procedures

2. E-mails board item to Purchasing Director for inclusion in purchasing items
3. Attach Board Book PDF as related document
3. **CONTRACT SPECIALIST**
 1. If accepted
 1. Activate all remaining components
 2. Enter account information in Notes Log to identify if other funding than the account provided at the time of request needs to be used.
 3. Change status to **FUND CONSTRUCTION**
11. FUND CONSTRUCTION - *Workflow: Serial; Go Status: **CONTRACT SETUP**; No Go Status: N/A*
 1. **UA PLANT FUNDS**
 1. Review account/estimate information in Notes log
 2. Validate or invalidate account
 1. If valid, encumber funds in FRS
 2. If invalid, contact client
 1. Add note
 3. If this project will be capitalized:
 1. If needed add new Account to AiM Account Manager??
 2. If needed add new Funding Source(s) in AiM
 3. Enter account(s) and funding source(s) on CP Account Setup screen
 4. Enter/Increase Account Budget on Capital Project
 5. If needed Enter Funding Transfer in AiM
 6. If not capitalized just respond to workflow
12. CONTRACT SETUP
 1. **CONTRACT SPECIALIST**
 1. Initiate Construction Contract process if outside contractor (*Note: Include Board Approval and PO in contract process definition*)
 2. Initiate Internal Work Agreement if in-house construction (*Note: Include this in IWA process definition*)
 3. Change status to **NTP**
13. NTP
 1. **LANDSCAPE SVC MGR** (*Personal Query*)
 1. Revises Project Manager if required
 1. If design was required change from design PM to construction PM
 2. If design was not required, change of PM not required
 2. **PROJECT MANAGER**
 1. Obtain Construction Permits if necessary
 1. At the start of Permit Activity, create a UAL for Building Permit
 2. Hold Preconstruction meeting with Project Team (review preconstruction checklist)
 3. Enter/update the Activity schedule in AiM
 4. Update Project Team to assign employee to INVOICE ADMIN and INVOICE APPROVER responsibilities
 5. For in-house work, monitor Internal Work Agreement for NTP status
 6. Change status to **CONSTRUCTION**
14. CONSTRUCTION
 1. **PROJECT MANAGER**
 1. Maintain Activity Schedule
 2. Process invoices
 3. Manage change proposals/change orders
 4. Hold periodic meetings
 5. Hold periodic Progress Reports/inspections



AiM™ CPPM Standard Operation Procedures

6. Project Commissioning if needed (found in AiM)
7. At move-in, create a UAL for Certificate of Occupancy (workflow to EHS)
8. Final walkthrough with client/project team
9. At Substantial Completion, change status to **CONSTR CLOSEOUT**
15. **CONSTR CLOSEOUT** – *Workflow: Parallel – Unanimous; Go Status: **FINANCIAL CLOSEOUT**; No Go Status: N/A*
 1. **PROJECT MANAGER**
 1. Facilitate the distribution of record drawings, O&M Manuals and as built.
 2. Approve final payments
 3. Manage property/construction warranty information
 4. Manage asset warranty information
 2. **PREVENTIVE MAINT SPC**
 1. Confirm that asset information has been received in the appropriate format
 2. Responds to Workflow
 3. **LANDSCAPE SVC MGR**
 1. Review financials and project details closed out
 2. Enter note to approve Closeout of Contracts
 4. **CONTRACT SPECIALIST**
 1. Process final payments
 2. Closeout WOs, IWAs
 3. Adjust allotment and funding source for project in AiM if there are any remaining funds on the project (adjustment to reduce the allotment and funding source) prior to closing project components
 4. Closeout Components
 5. Review Project Closeout checklist, attach checklist in AiM
 6. Closeout Contract AFTER reviewing note from LANDCAPE SVC MGR approving closing contracts.
 7. Respond to Workflow
16. **FINANCIAL CLOSEOUT** – *Workflow: Serial; Go Status: **PROJECT CLOSEOUT**; No Go Status: N/A*
 1. **FM ACCOUNTING**
 1. Ensure final; billing has occurred
 2. **UA PLANT FUNDS**
 1. Release any remaining encumbrance in FRS
17. **PROJECT CLOSEOUT**
 1. **ADMIN ASST FMCS**
 1. Send final closeout letter and survey to client
 2. Change status to **CLOSED**

Note: Create Quality Control Reports/project reports
18. **CLOSED (VICTORY!)**
19. **ON HOLD**
20. **DECLINED (CLIENT DRIVEN)**
21. **CANCELED (INTERNAL)**

BUDGET REVISION

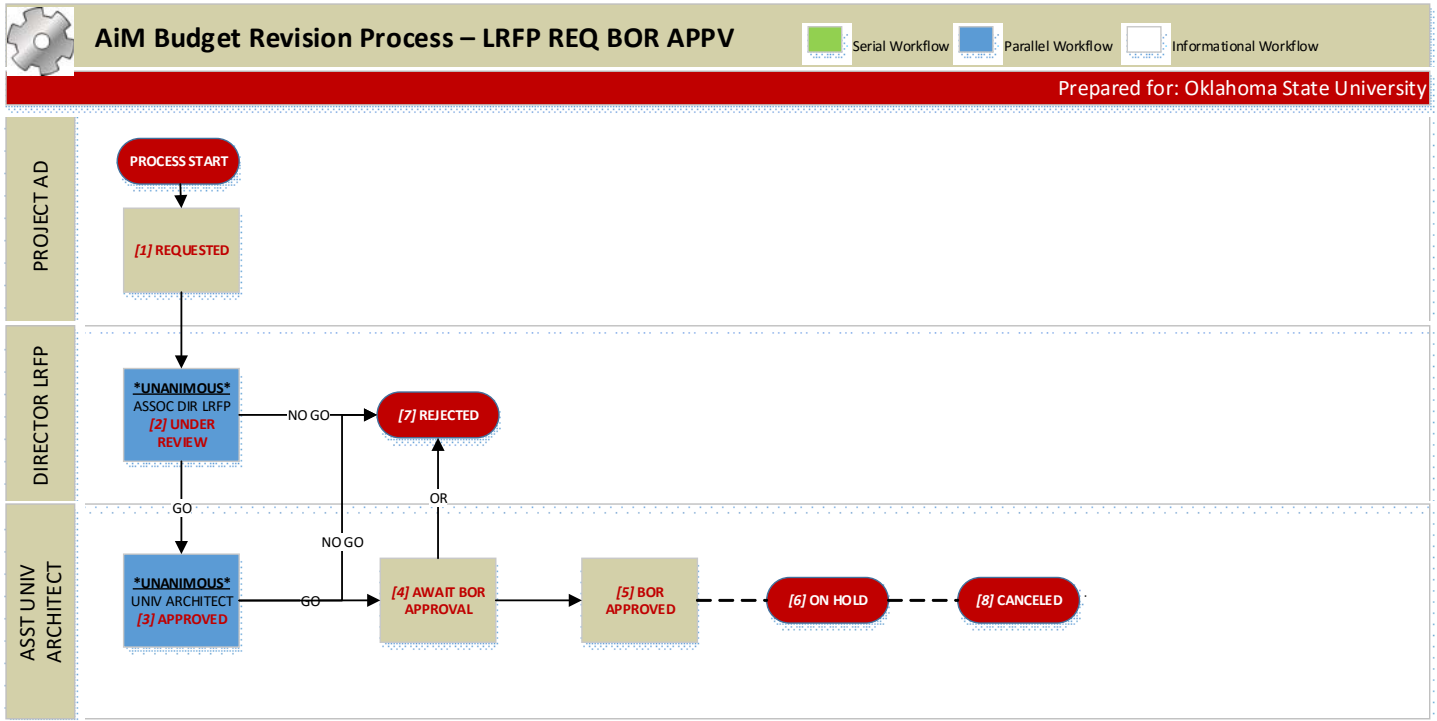
The Budget Revision Screen enables budget adjustments for one or more components from the same project. Revisions are stored historically for auditing purposes. Only components in a status associated to an active status flag are displayed.

Workflows could play an important role in budget revisions if reviews and approvals are required.

Budget revision types do not have a hierarchical relationship with budget revision statuses, unlike most type/status relationships in AiM.

Budget revision reasons provide helpful insight into why budgets change throughout the project lifecycles

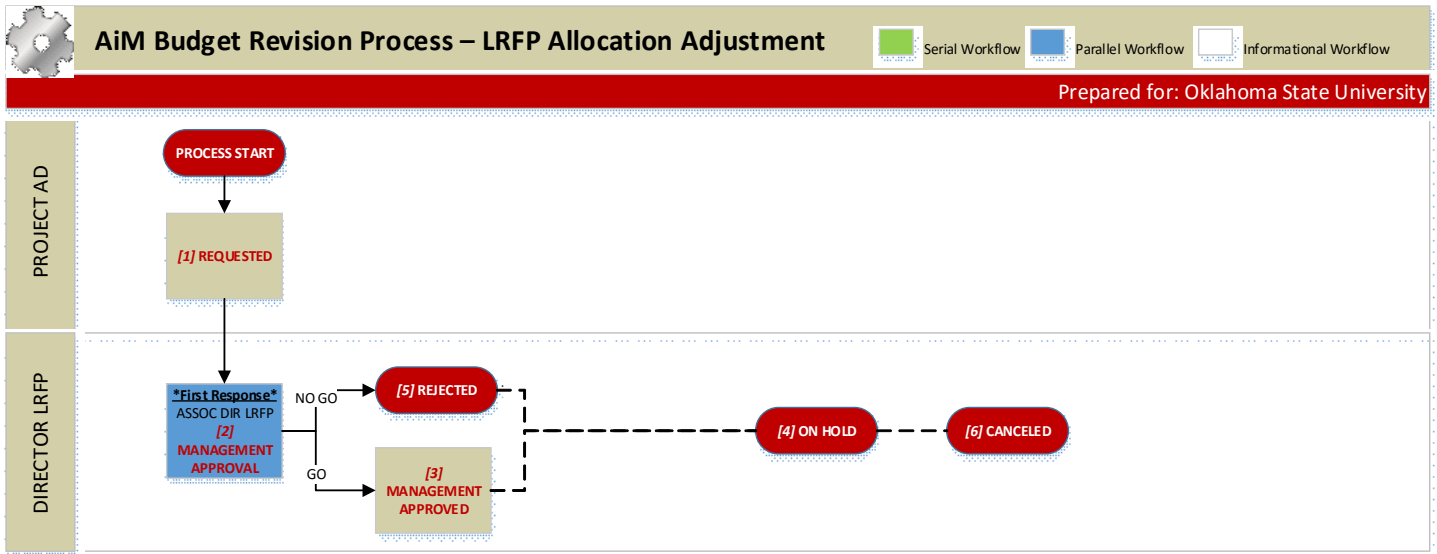
Budget Revision Approval Process – LRFP REQ BOR APPV



LRFP REQ BOR APPV PROCESS DOCUMENTATION

1. REQUESTED
 1. **PROJECT AD**
 1. Enter Budget Revision
 2. Change status to **UNDER REVIEW**
2. UNDER REVIEW – *Workflow: Parallel - Unanimous; Go Status: **APPROVED**; No Go Status: **REJECTED***
 1. **ASSOC DIR LRFP**
 2. **DIRECTOR LRFP**
3. APPROVED – *Workflow: Parallel – First Response; Go Status: **AWAIT BOR APPROVAL**; No Go Status: **REJECTED***
 1. **UNIVERSITY ARCHITECT**
 1. Prepare Board Agenda Item
 2. **ASST UNIV ARCHITECT**
 1. Prepare Board Agenda Item
4. AWAIT BOR APPROVAL (*Personal Query*)
 1. **UNIVERSITY ARCHITECT**
 1. Following Board Meeting update status to **BOR APPROVED** or **REJECTED**
 2. **ASST UNIV ARCHITECT**
 1. Following Board Meeting update status to **BOR APPROVED** or **REJECTED**
5. BOR APPROVED
6. ON HOLD
7. REJECTED
8. CANCELED

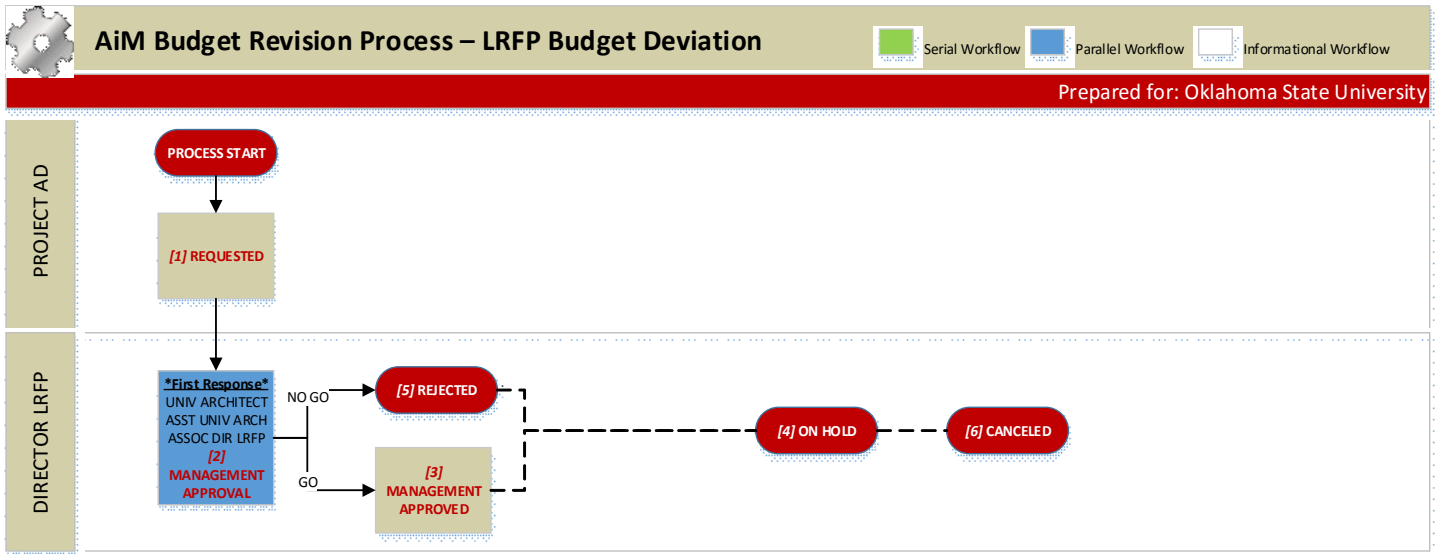
Budget Revision Approval Process – LRF Allocation Adjustment



LRFP ALLOCATION ADJUSTMENT PROCESS DOCUMENTATION

1. REQUESTED
 1. **PROJECT AD**
 1. Enter Budget Revision
 2. Change status to **MANAGEMENT APPROVAL**
2. MANAGEMENT APPROVAL – *Workflow: Parallel – First Response; Go Status: **MANAGEMENT APPROVED**; No Go Status: **REJECTED***
 1. **ASSOC DIR LRF**
 2. **DIRECTOR LRF**
3. MANAGEMENT APPROVED
4. ON HOLD
5. REJECTED
6. CANCELED

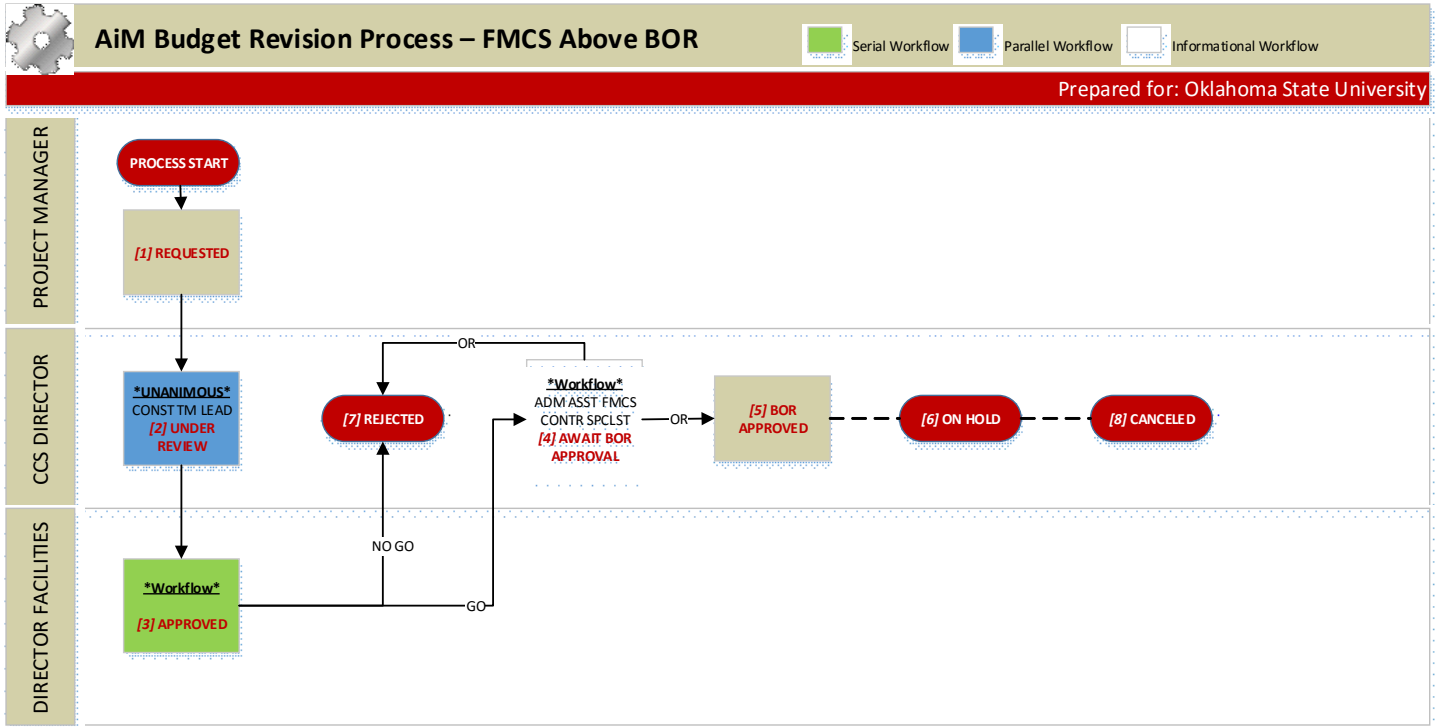
Budget Revision Approval Process – LRF Budget Deviation



LRFP BUDGET DEVIATION PROCESS DOCUMENTATION

1. REQUESTED
 1. **PROJECT AD**
 1. Enter Budget Revision
 2. Change status to **MANAGEMENT APPROVAL**
2. MANAGEMENT APPROVAL – *Workflow: Parallel – First Response; Go Status: **MANAGEMENT APPROVED**; No Go Status: **REJECTED***
 1. **UNIVERSITY ARCHITECT**
 2. **ASST UNIV ARCHITECT**
 3. **ASSOC DIR LRF**
 4. **DIRECTOR LRF**
3. MANAGEMENT APPROVED
4. ON HOLD
5. REJECTED
6. CANCELED

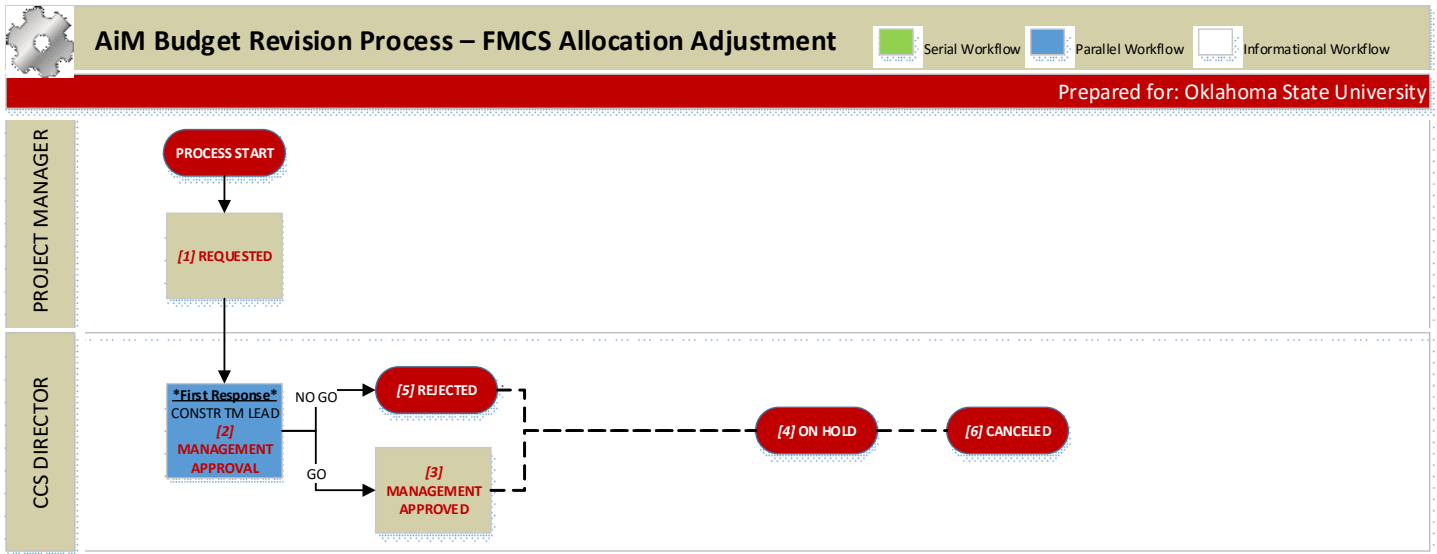
Budget Revision Approval Process – FMCS Above BOR



FMCS ABOVE BOR PROCESS DOCUMENTATION

1. REQUESTED
 1. **PROJECT MANAGER**
 1. Enter Budget Revision
 2. Prepare Board Agenda Item and attach to the Budget Revision in AiM
 3. Change status to **UNDER REVIEW**
2. UNDER REVIEW – *Workflow: Parallel - Unanimous; Go Status: **APPROVED**; No Go Status: N/A*
 1. **CONST TEAM LEADER**
 2. **CCS DIRECTOR**
3. APPROVED – *Workflow: Serial; Go Status: **AWAIT BOR APPROVAL**; No Go Status: **REJECTED***
 1. **DIRECTOR FACILITIES**
 1. Finalize Board Agenda Item and attach to the Budget Revision in AiM
 2. Respond to Workflow
4. AWAIT BOR APPROVAL – *Workflow: Informational Only*
 1. **ADMIN ASST FMCS /CONTRACT SPECIALIST**
 1. Attach Board item once received from Joyce
 2. **CCS DIRECTOR**
 1. Following Board Meeting update status to **BOR APPROVED** or **REJECTED**
 2. *Whoever responds to workflow, send an e-mail from the Budget Revision to the PROJECT MANAGER with the status of the budget revision, approved or rejected.*
5. BOR APPROVED
6. ON HOLD
7. REJECTED
8. CANCELED

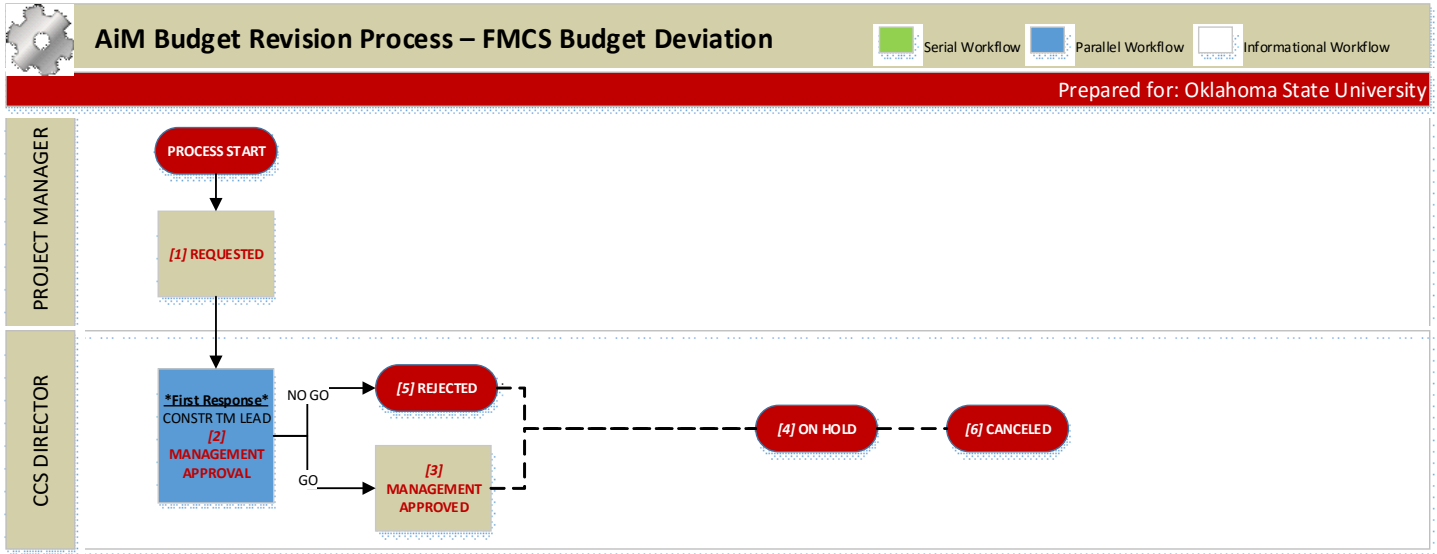
Budget Revision Approval Process – FMCS Allocation Adjustment



FMCS ALLOCATION ADJUSTMENT PROCESS DOCUMENTATION

1. REQUESTED
 1. **PROJECT MANAGER**
 1. Enter Budget Revision
 2. Change status to **MANAGEMENT APPROVAL**
2. MANAGEMENT APPROVAL – *Workflow: Parallel – First Response; Go Status: **MANAGEMENT APPROVED**; No Go Status: **REJECTED***
 1. **CONST TEAM LEADER**
 2. **CCS DIRECTOR**
3. MANAGEMENT APPROVED
4. ON HOLD
5. REJECTED
6. CANCELED

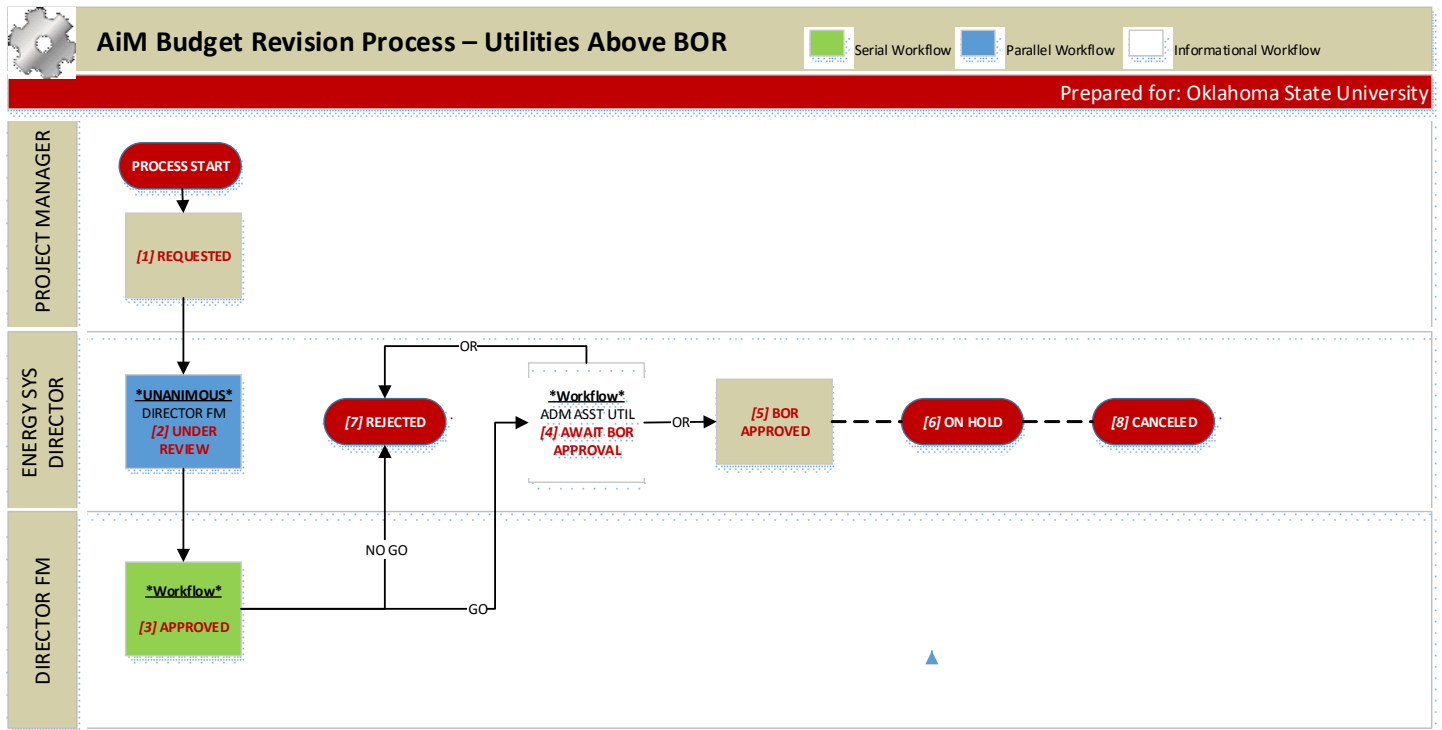
Budget Revision Approval Process – FMCS Budget Deviation



FMCS BUDGET DEVIATION PROCESS DOCUMENTATION

1. REQUESTED
 1. **PROJECT MANAGER**
 1. Enter Budget Revision
 2. Change status to **MANAGEMENT APPROVAL**
2. MANAGEMENT APPROVAL – *Workflow: Parallel – First Response; Go Status: **MANAGEMENT APPROVED**; No Go Status: **REJECTED***
 1. **CONST TEAM LEADER**
 2. **CCS DIRECTOR**
3. MANAGEMENT APPROVED
4. ON HOLD
5. REJECTED
6. CANCELED

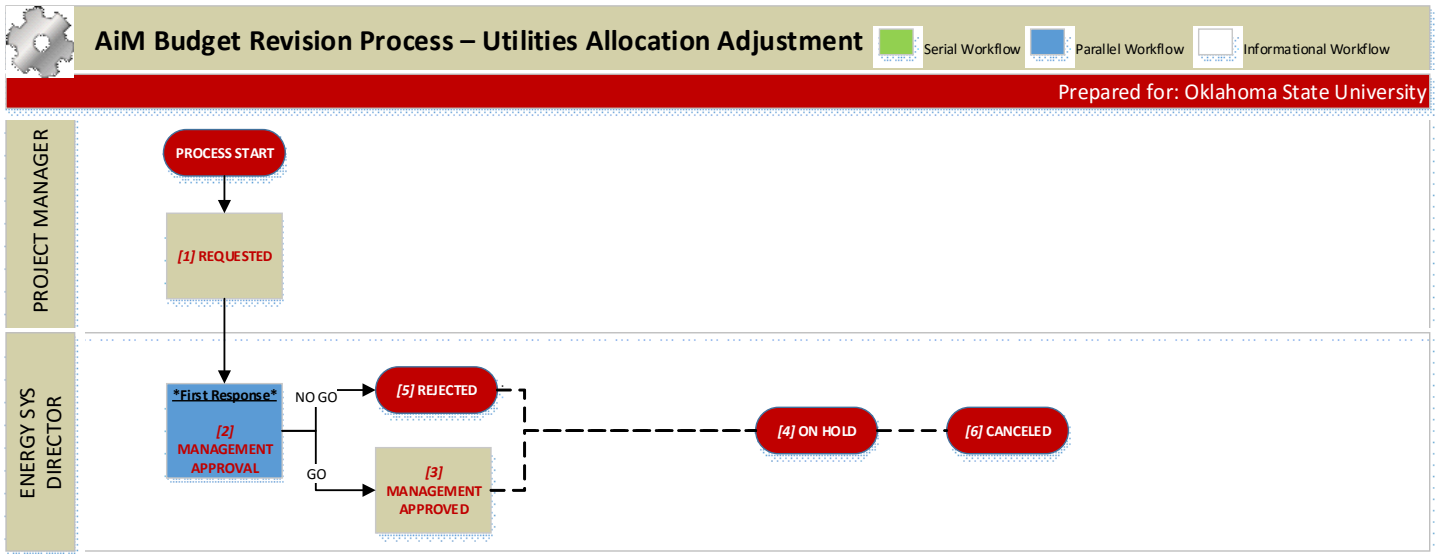
Budget Revision Approval Process – Utilities Above BOR



UTILITIES ABOVE BOR PROCESS DOCUMENTATION

1. REQUESTED
 1. **PROJECT MANAGER**
 1. Enter Budget Revision
 2. Prepare Board Agenda Item and attach to the Budget Revision in AiM
 3. Change status to **UNDER REVIEW**
2. UNDER REVIEW – *Workflow: Parallel - Unanimous; Go Status: **APPROVED**, No Go Status: N/A*
 1. **ENERGY SYS DIRECTOR**
 2. **DIRECTOR FM**
3. APPROVED – *Workflow: Serial; Go Status: **AWAIT BOR APPROVAL**, No Go Status: **REJECTED***
 1. **DIRECTOR FM**
 1. Finalize Board Agenda Item and attach to the Budget Revision in AiM
 2. Respond to Workflow
4. AWAIT BOR APPROVAL (*Personal Query*)
 1. **ADMIN ASST UTILITIES**
 1. Attach Board item once received from Joyce
 2. **ENERGY SYS DIRECTOR**
 1. Following Board Meeting update status to **BOR APPROVED** or **REJECTED**
 2. *Whoever responds to workflow, send an e-mail from the Budget Revision to the PROJECT MANAGER with the status of the budget revision, approved or rejected.*
5. BOR APPROVED
6. ON HOLD
7. REJECTED
8. CANCELED

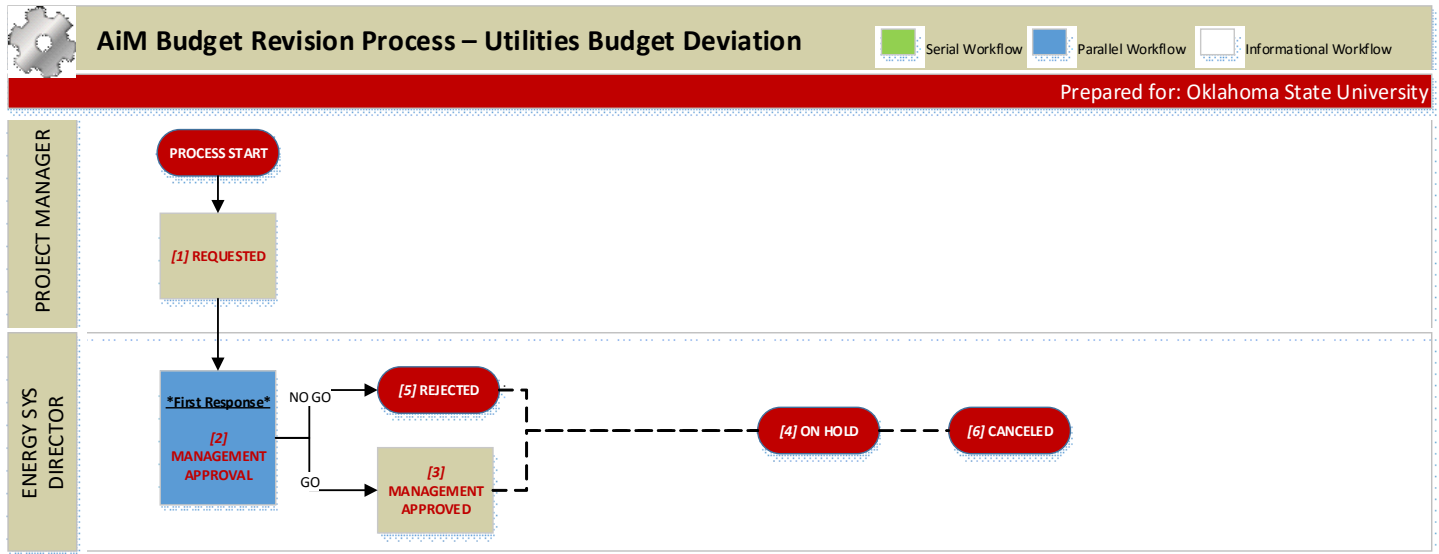
Budget Revision Approval Process – Utilities Allocation Adjustment



Utilities Allocation Adjustment Process Documentation

1. REQUESTED
 1. **PROJECT MANAGER**
 1. Enter Budget Revision
 2. Change status to **MANAGEMENT APPROVAL**
2. MANAGEMENT APPROVAL – *Workflow: Parallel – First Response; Go Status: **MANAGEMENT APPROVED**, No Go Status: **REJECTED***
 1. **ENERGY SYS DIRECTOR**
3. MANAGEMENT APPROVED
4. ON HOLD
5. REJECTED
6. CANCELED

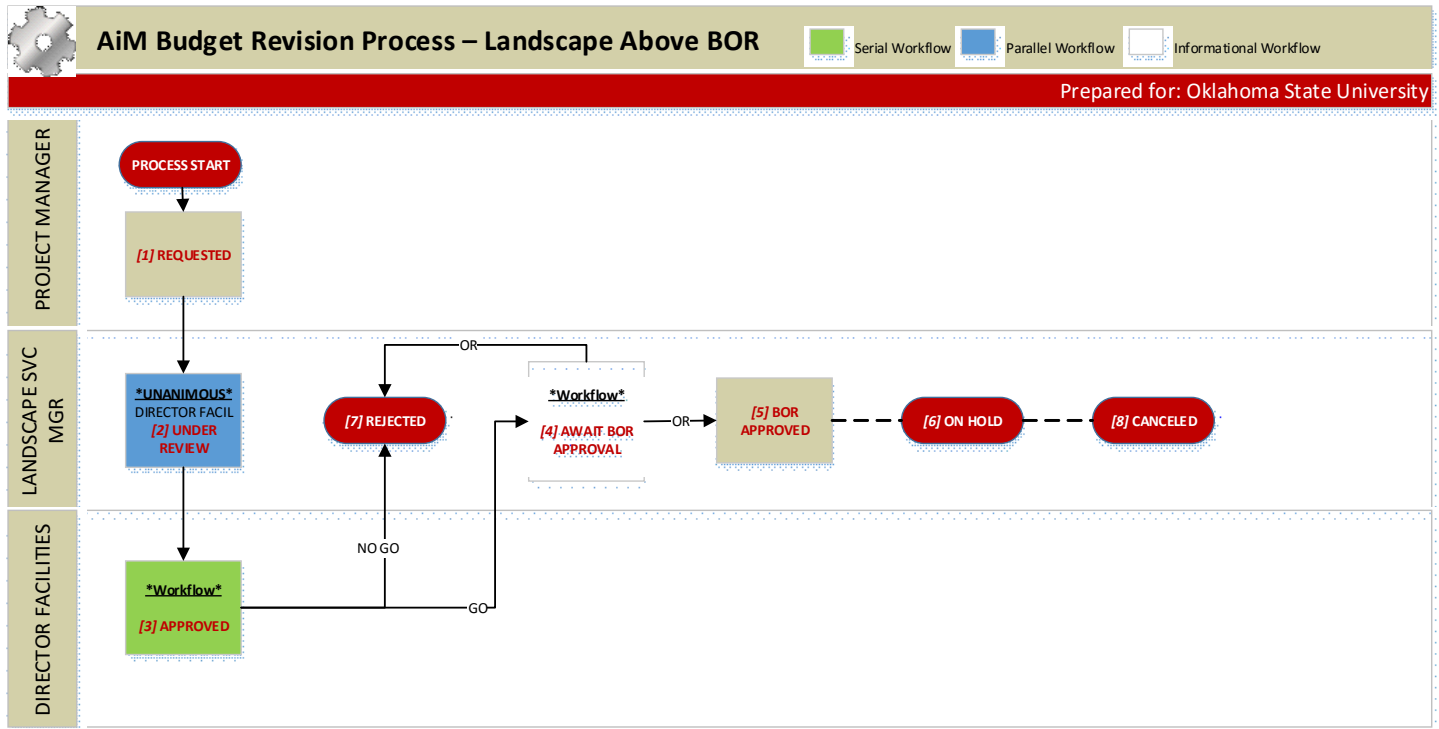
Budget Revision Approval Process – Utilities Budget Deviation



UTILITIES BUDGET DEVIATION PROCESS DOCUMENTATION

1. REQUESTED
 1. **PROJECT MANAGER**
 1. Enter Budget Revision
 2. Change status to **MANAGEMENT APPROVAL**
2. MANAGEMENT APPROVAL – *Workflow: Parallel – First Response; Go Status: **MANAGEMENT APPROVED**, No Go Status: **REJECTED***
 1. **ENERGY SYS DIRECTOR**
3. MANAGEMENT APPROVED
4. ON HOLD
5. REJECTED
6. CANCELED

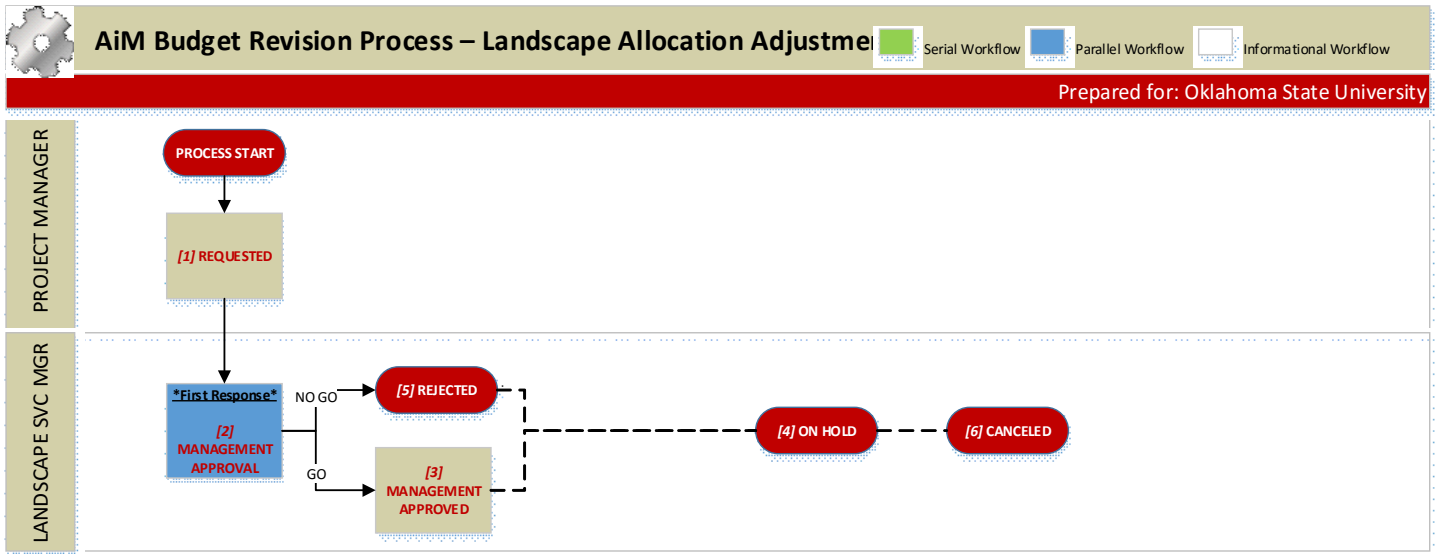
Budget Revision Approval Process – Landscape Above BOR



LANDSCAPE ABOVE BOR PROCESS DOCUMENTATION

1. REQUESTED
 1. **PROJECT MANAGER**
 1. Enter Budget Revision
 2. Prepare Board Agenda Item and attach to the Budget Revision in AiM
 3. Change status to **UNDER REVIEW**
2. UNDER REVIEW – Workflow: Parallel - Unanimous; Go Status: **APPROVED**, No Go Status: N/A
 1. **LANDSCAPE SVC MGR**
 2. **DIRECTOR FACILITIES**
3. APPROVED – Workflow: Serial; Go Status: **AWAIT BOR APPROVAL**, No Go Status: **REJECTED**
 1. **DIRECTOR FACILITIES**
 1. Finalize Board Agenda Item and attach to the Budget Revision in AiM
 2. Respond to Workflow
4. AWAIT BOR APPROVAL (Personal Query)
 1. **LANDSCAPE SVC MGR**
 1. Following Board Meeting update status to **BOR APPROVED** or **REJECTED**
 2. Whoever responds to workflow, send an e-mail from the Budget Revision to the **PROJECT MANAGER** with the status of the budget revision, approved or rejected.
Note: Decide if attachment is needed.
5. BOR APPROVED
6. ON HOLD
7. REJECTED
8. CANCELED

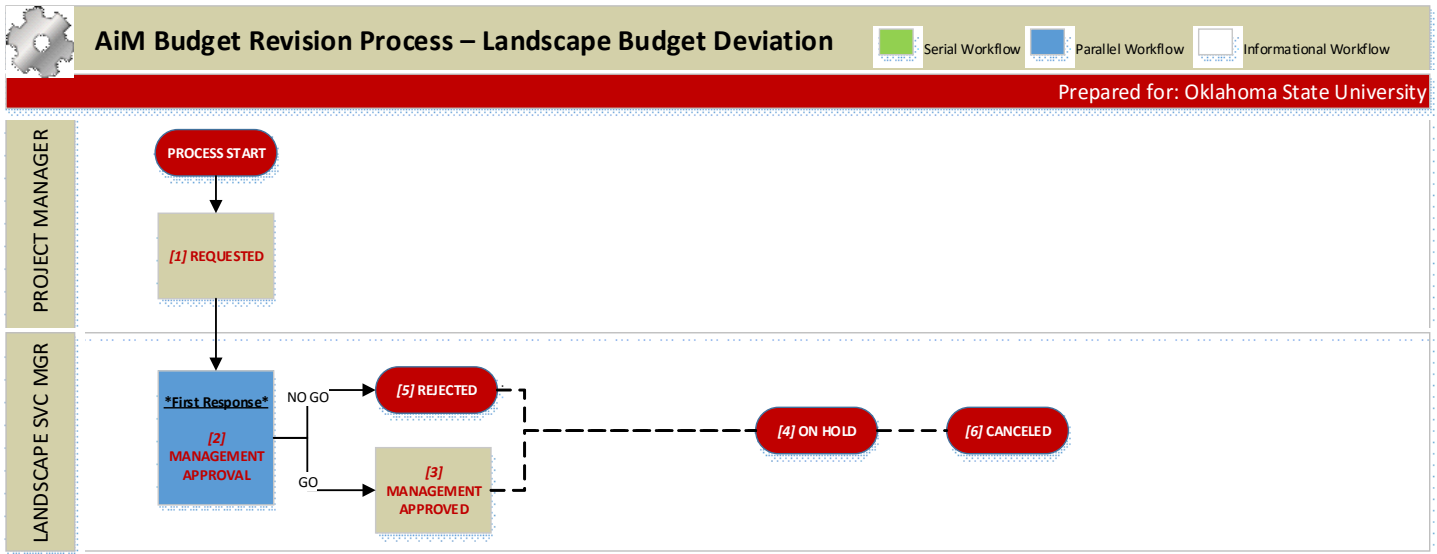
Budget Revision Approval Process – Landscape Allocation Adjustment



LANDSCAPE ALLOCATION ADJUSTMENT PROCESS DOCUMENTATION

1. REQUESTED
 1. **PROJECT MANAGER**
 1. Enter Budget Revision
 2. Change status to **MANAGEMENT APPROVAL**
2. MANAGEMENT APPROVAL – *Workflow: Parallel – First Response; Go Status: **MANAGEMENT APPROVED**, No Go Status: **REJECTED***
 1. **LANDSCAPE SVC MGR**
3. MANAGEMENT APPROVED
4. ON HOLD
5. REJECTED
6. CANCELED

Budget Revision Approval Process – Landscape Budget Deviation



LANDSCAPE BUDGET DEVIATION PROCESS DOCUMENTATION

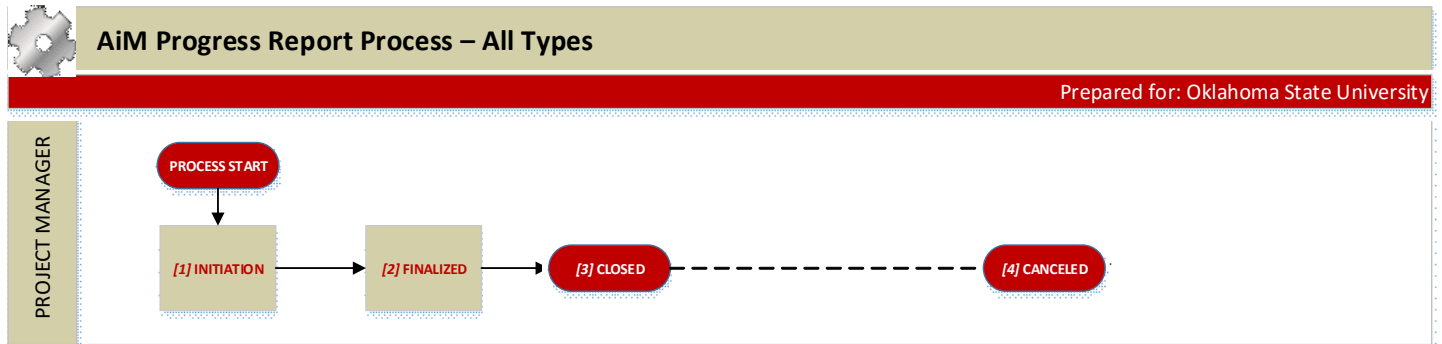
1. REQUESTED
 1. **PROJECT MANAGER**
 1. Enter Budget Revision
 2. Change status to **MANAGEMENT APPROVAL**
2. MANAGEMENT APPROVAL – *Workflow: Parallel – First Response; Go Status: **MANAGEMENT APPROVED**, No Go Status: **REJECTED***
 1. **LANDSCAPE SVC MGR**
3. MANAGEMENT APPROVED
4. ON HOLD
5. REJECTED
6. CANCELED

PROGRESS REPORT

The Progress Report Screen enables the capture of day-to-day project observations as well as progress reporting at the capital project component level. This includes the tracking of weather conditions and provides a mechanism for associating drawings, pictures, other types of documentation pertinent to the capital project.

The progress report can easily update multiple capital project components at once.

Progress Report Approval Process



PROGRESS REPORT PROCESS DOCUMENTATION

1. INITIATION

1. PROJECT MANAGER

1. Enter Progress Report in AiM
2. Add notes to follow up, as appropriate.
3. Attach documents/pictures, as appropriate.
4. If an issue comes up, create an ISSUE instead of logging it in a progress report.
5. When finished creating report, change status to **FINALIZED**

2. FINALIZED – (Personal Query)

1. PROJECT MANAGER

1. Add/Update components where appropriate
2. When report is completed, change status to **CLOSED**

3. CLOSED

4. CANCELED

ISSUE

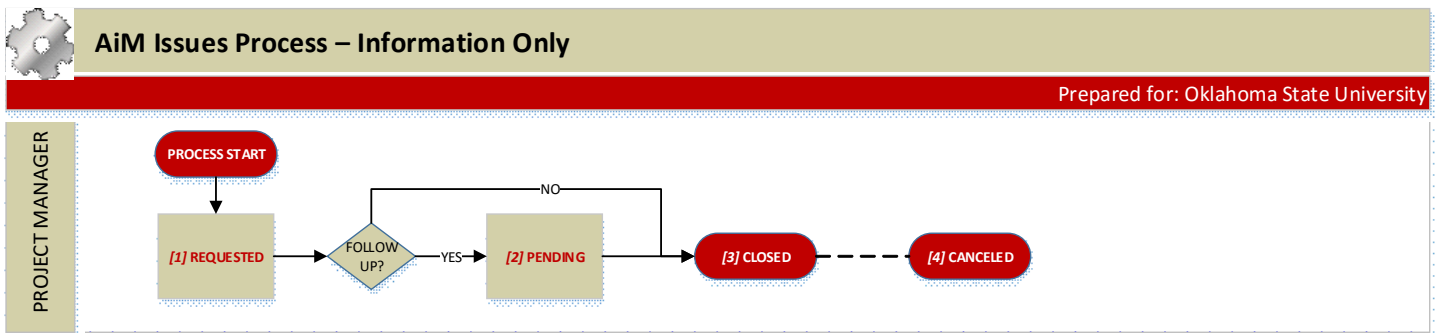
The Issue Screen is used to manage financial or non-financial issues that may arise during the project lifecycle. If the issue has a financial impact, the issue line item cost will automatically update the anticipated cost on the capital project itself. Issues can be associated with capital project meeting minutes for tracking purposes by date and by meeting. Issues can also be promoted to construction change proposals, direct expenses, and construction change directives. This screen assists greatly with the day-to-day management of project activities that could ultimately change the scope of the project.

Only line item costs update the anticipated cost on the capital project. The header “planned cost” is merely for planning purposes and does not update any project totals.

Issues do not require line items.

Issues can be linked to one or multiple meeting minutes to indicate which meeting included the discussion of the issue.

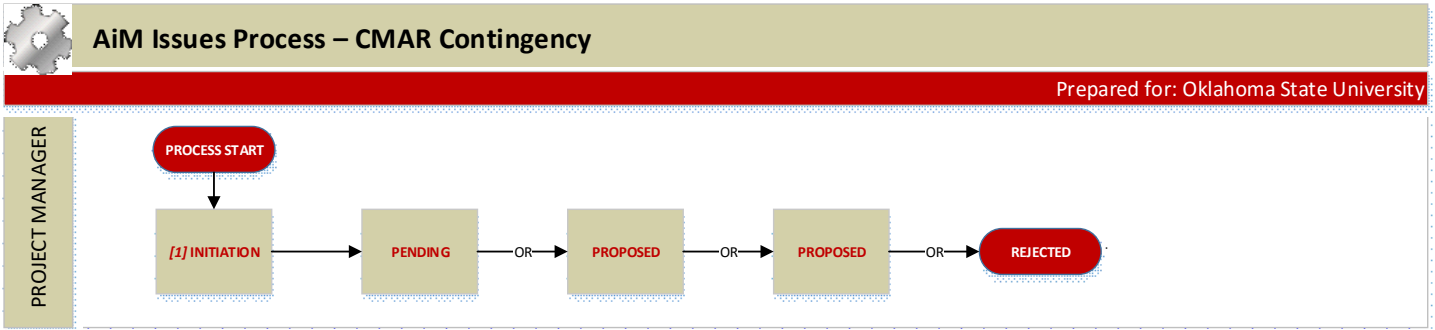
Issue Approval Process – Information Only



INFORMATION ONLY ISSUE PROCESS DOCUMENTATION

1. INITIATION
 1. **PROJECT MANAGER**
 1. Enter Issue in AiM
 2. If follow up is required, change status to **PENDING**
 3. If no follow up is required, change status to **CLOSED**
2. PENDING
 1. **PROJECT MANAGER**
 1. Add notes and documents related to follow up, as appropriate.
 2. If needed, change the Issue Type
 3. When follow up completed, change status to **CLOSED**
3. CLOSED
4. CANCELED

Issue Approval Process – CMAR Contingency



CMAR CONTINGENCY ISSUES PROCESS DOCUMENTATION

1. INITIATION

1. PROJECT MANAGER

1. Enter Issue in AiM
2. Add notes and documents related to follow up, as appropriate.
3. Change Status to:
 1. **PENDING**
 2. **PROPOSED**
 3. **APPROVED** *(This needs to be a closed flag.)*
 4. **REJECTED**

2. PENDING – *(Personal Query)*

1. PROJECT MANAGER

1. Add notes and documents related to follow up – as appropriate.
2. Change Status to:
 1. **PROPOSED**
 2. **APPROVED**
 3. **REJECTED**

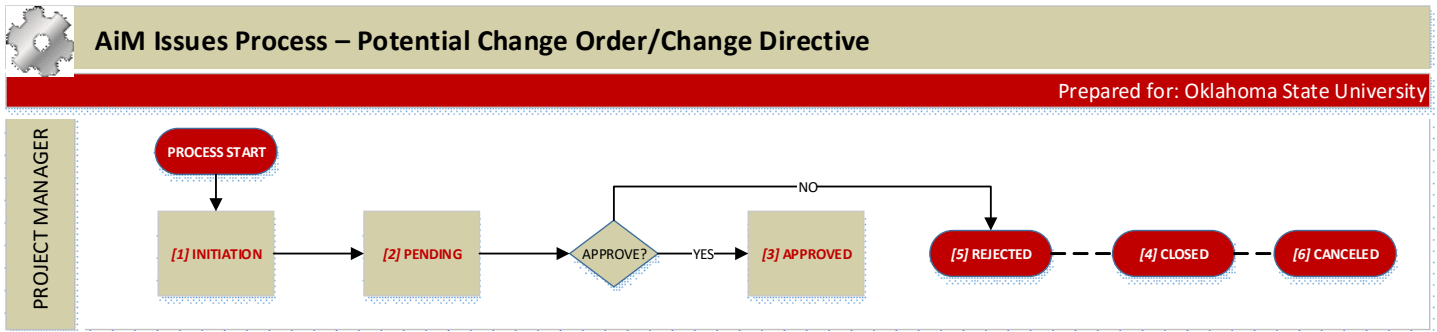
3. PROPOSED – *(Personal Query)*

1. PROJECT MANAGER

1. Add notes and documents related to follow – as appropriate.
2. Change Status to:
 1. **APPROVED**
 2. **REJECTED**

4. APPROVED
5. REJECTED
6. CANCELED

Issue Process – Potential Changer Order/Change Directive



POTENTIAL CHANGE ORDER/CHANGE DIRECTIVE ISSUE PROCESS DOCUMENTATION

1. INITIATION

1. PROJECT MANAGER

1. Enter Issue in AiM

1. Enter a Line Item onto the issue if tying to a change order/directive

2. Change status to **PENDING**

2. PENDING – (Personal Query)

1. PROJECT MANAGER

1. Add notes and documents related to follow up, as appropriate.

2. Coordinate resolution with appropriate management

3. If needed, change the Issue Type

4. If Approved (to move forward as change proposal/change directive), change status to

APPROVED

5. If Rejected, change status to **REJECTED**

3. APPROVED

4. CLOSED

5. REJECTED

6. CANCELED

MEETING MINUTES

This screen captures meeting details and enables the user to begin a paper trail of the issue lifecycle, from inception to change order. Meeting minutes can track multiple types of meetings, from design meetings to weekly progress meetings. This screen also optionally allows for the quick creation of the next meeting so queries can be built for future meetings and meeting locations.

Issues associated to the meeting minutes have a significant impact on capital project planning by providing the earliest notice of potential problems affecting project cost, scope, and schedule.

The meeting minute's type code does not have a hierarchical relationship with statuses.

Issues are not required to manage meeting minutes.

There is not a definable flowchart for meeting minutes as the status codes are "created" and "closed."

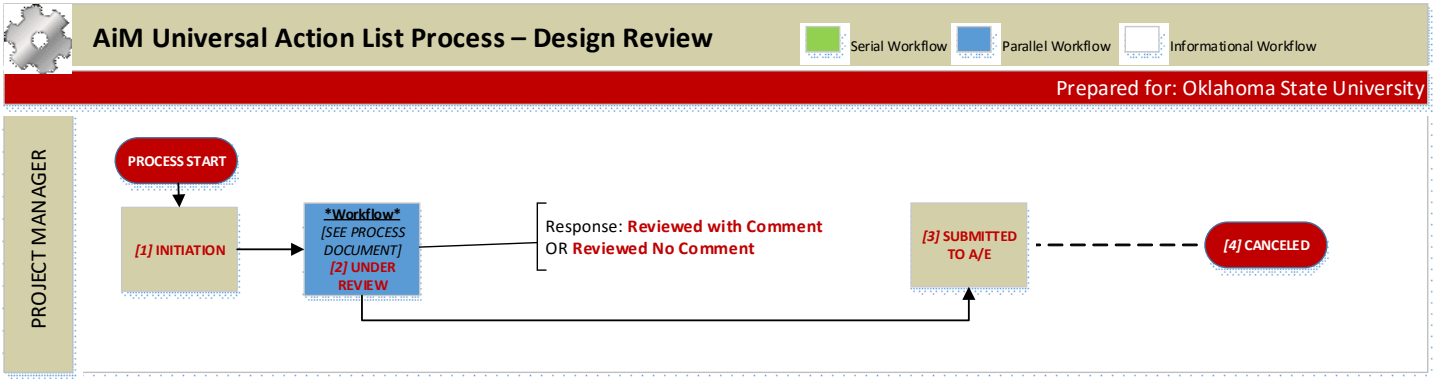
UNIVERSAL ACTION LIST

The Universal Action List Screen is a simple to use screen for managing lists of action items that require a response. These action items are simple tasks that do not require the weight of a defined issue.

Action items are often assigned at meetings where issues are being discussed. Issue resolution is often accomplished by maintaining an organized sequence of action items and this screen performs that function.

The Workflow View enables programmatic definition and control of the routing of action items to a specific user's AiM WorkDesk, relative to a specific CPPM table (e.g., Capital Project Screen).

Universal Action List Approval Process – Design Review



DESIGN REVIEW PROCESS DOCUMENTATION

1. INITIATION

1. PROJECT MANAGER

1. Enter description (example: “Bid Package 1 includes civil, site utilities, landscaping...”)
2. Type: Design Review
3. Enter Plan Review type as UDF
4. Enter a review date and due date
5. Populate Capital Project and Contract fields
6. Add Action line 1 (e.g. initiate SD review)
7. Attach drawings as a related document
8. Change status to **UNDER REVIEW**

2. UNDER REVIEW – Workflow: Parallel (Response options will be 1. Reviewed with Comment 2. Reviewed No Comment); No Go Status: N/A

1. PROJECT MANAGER

1. Enter Response, and complete lines, as desired
2. When due date is reached (personal query), change status to **SUBMITTED TO A/E**

2. ASSOC DIR LRFP
3. INTERIOR DESIGNER
4. DIRECTOR LRFP
5. MECHANICAL ENGINEER
6. PROJECT AD
7. UNIVERSITY ARCHITECT
8. ASST UNIV ARCHITECT
9. UTILITY ENGINEER
10. ENERGY ENGINEER
11. ELECTRICAL ENGINEER
12. CAMPUS SURVEYOR
13. GEOSPL SYSTEMS MGR
14. ENERGY SYS DIRECTOR
15. RECS SECTION SUPV
16. CCS DIRECTOR
17. EHS FIRE MARSHALL
18. EHS PLAN REVIEWER
19. EHS FIRE PROTECT
20. EHS FIRE LIFE INSPECT



21. **EHS ASST DIRECTOR**
22. **LANDSCAPE SVC MGR**
23. **URBAN FORESTER**
24. **O&M DIRECTOR**
25. **ADA SPECIALIST**
26. **LANDSCAPE ASST MGR**
27. **ENERGY MANAGER**
28. **CONST TEAM LEADER**
29. **CT MEP MANAGER**
30. **CT STRUCTURAL MGR**
31. **CCS PLAN REVIEWER**

1. Each Reviewer Enters the Following:

2. Reference

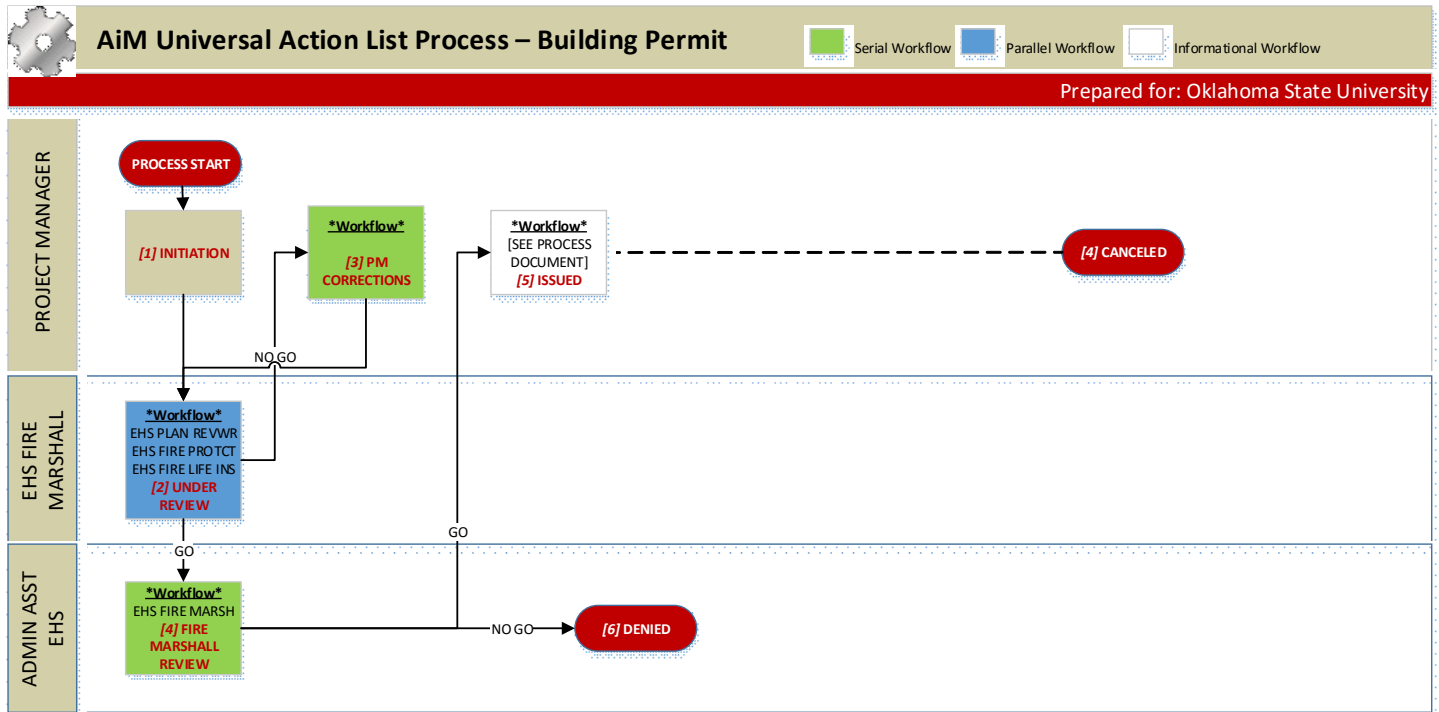
1. Item

2. Description

3. SUBMITTED TO A/E

4. CANCELED

Universal Action List Approval Process – Building Permit



BUILDING PERMIT PROCESS DOCUMENTATION

1. INITIATION

1. PROJECT MANAGER

1. Enter description (example: Project title or expanded description, bldg. rooms, etc)
2. Type: Building Permit
3. Enter a review date and due date (due date is requested start date)
4. Populate Capital Project and Contract fields
5. Verify scope/construction documents necessary are attached to the project related documents
6. Add notes as required
7. Change status to **UNDER REVIEW**

2. UNDER REVIEW – Workflow: Parallel: First Response; Go Status: **FIRE MARSHALL REVIEW**, No Go Status: **PM CORRECTIONS**

1. EHS FIRE MARSHALL

1. Review scope/construction documents
2. Review notes
3. Further information/clarification required, annotate in Action Items
4. Enter Action Items as required

2. EHS PLAN REVIEWER

3. EHS FIRE PROTECT

4. EHS FIRE LIFE INSPECT

3. PM CORRECTIONS – Workflow: Serial ; Go Status: **UNDER REVIEW**, No Go Status: **N/A**

1. PROJECT MANAGER

1. Respond to Action Items
2. Respond to Workflow

4. FIRE MARSHALL REVIEW - Workflow: SERIAL: ; Go Status: **ISSUED**, No Go Status: **DENIED**

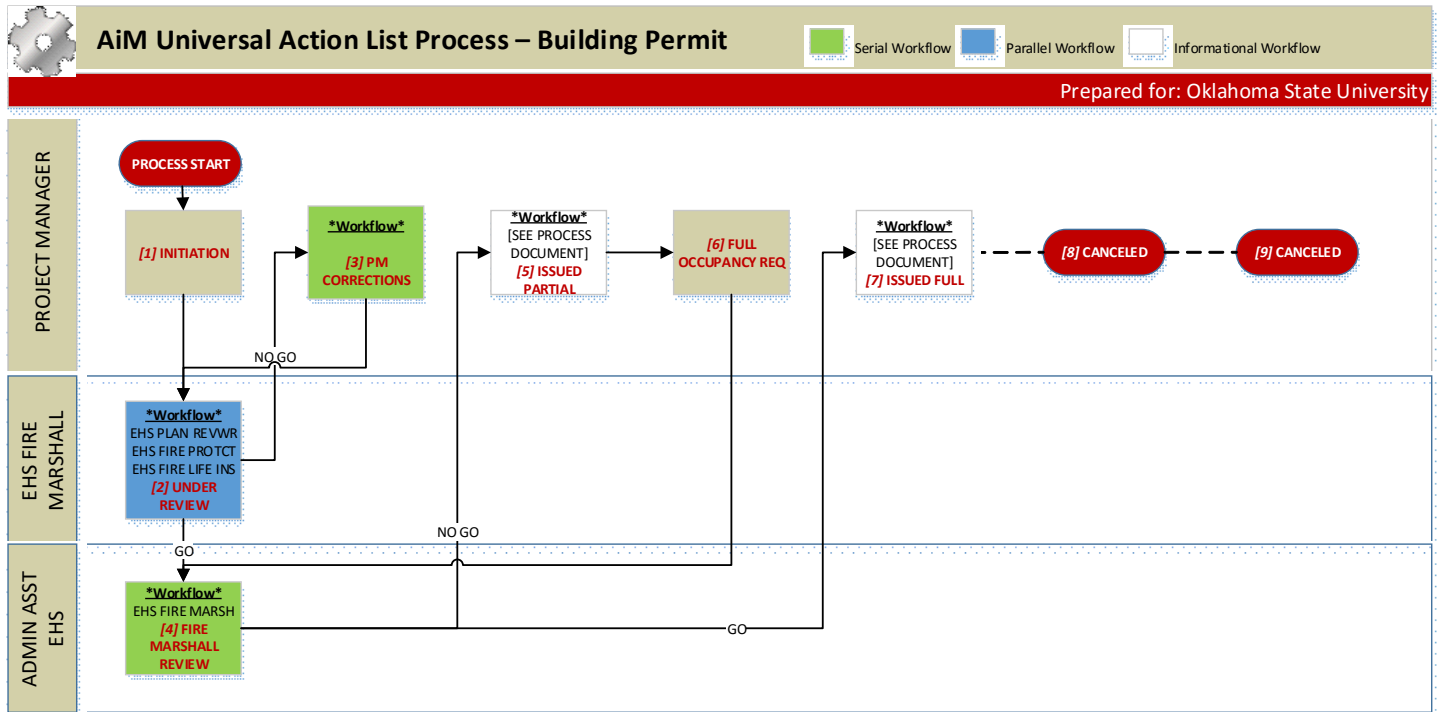
1. ADMIN ASST EHS



AiM™ CPPM Standard Operation Procedures

1. Print permit for Fire Marshall Signature (print report from AiM)
2. **EHS FIRE MARSHALL**
 1. Review scope/construction documents
 2. Review notes
 3. Enter Action Items as required
 4. Signs Building Permit
3. **ADMIN ASST EHS**
 1. If approved, scan Building Permit and attach as related document
 2. If Not Approved, respond to workflow
 3. Responds to workflow
5. ISSUED – *Workflow: Informational Only*
 1. **PROJECT MANAGER**
 2. **UA PLANT FUNDS**
 3. **RISK AND PROPERTY**
 4. **DIRECTOR PUB SAFETY**
 5. **GEOSPL SYSTEMS MGR**
 6. **BAM DIRECTOR**
 7. **EHS DIRECTOR**
 8. **DIRECTOR FM**
 9. **DIRECTOR FACILITIES**
 10. **DIRECTOR LRFP**
 11. **ASSOC DIR LRFP**
 12. **PROJECT AD**
 13. **DIRECTOR ACCOUNTING**
 14. **GCA CONTACT**
6. DENIED
7. CANCELED

Universal Action List Approval Process – Occupancy



OCCUPANCY PROCESS DOCUMENTATION

1. INITIATION

1. PROJECT MANAGER

1. Enter description (example: Project title or expanded description, bldg. rooms, etc)
2. Type: OCCUPANCY
3. Enter due date (requested occupancy date)
4. Populate Capital Project and Contract fields
5. Add notes as required
6. Change status to **UNDER REVIEW**

2. UNDER REVIEW – Workflow: Parallel: First Response; Go Status: **FIRE MARSHALL REVIEW**, No Go Status: **PM CORRECTIONS**

1. EHS FIRE MARSHALL

1. Review scope/construction documents/Notes
2. Further information/clarification required, annotate in Action Items
3. Enter Action Items as required

2. EHS PLAN REVIEWER

3. EHS FIRE PROTECT

4. EHS FIRE LIFE INSPECT

3. PM CORRECTIONS – Workflow: Serial ; Go Status: **UNDER REVIEW**, No Go Status: **N/A**

1. PROJECT MANAGER

1. Respond to Action Items
2. Respond to Workflow

4. FIRE MARSHALL REVIEW - Workflow: SERIAL: ; Go Status: **ISSUED FULL**, No Go Status: **ISSUED PARTIAL**

1. ADMIN ASST EHS

1. Print Certificate of Occupancy for Fire Marshall Signature (print report from AiM)

2. EHS FIRE MARSHALL



AiM™ CPPM Standard Operation Procedures

1. Review scope/construction documents
 2. Review notes
 3. Enter Action Items as required
 4. Signs Certificate of Occupancy
3. **ADMIN ASST EHS**
 1. If approved, scan Certificate of Occupancy and attach as related document
 2. If Not Approved, respond to workflow
 3. Responds to workflow
5. ISSUED PARTIAL– *Workflow: Information Only*
 1. **PREVENTIVE MAINT SPC**
 1. Confirm that asset information has been received in the appropriate format
 2. Manage property/construction warranty information
 3. Manage asset warranty information
 2. **UA PLANT FUNDS**
 3. **RISK AND PROPERTY**
 4. **DIRECTOR PUB SAFETY**
 5. **GEOSPL SYSTEMS MGR**
 6. **BAM DIRECTOR**
 7. **EHS DIRECTOR**
 8. **DIRECTOR FM**
 9. **DIRECTOR FACILITIES**
 10. **DIRECTOR LRFP**
 11. **ASSOC DIR LRFP**
 12. **PROJECT AD**
 13. **DIRECTOR ACCOUNTING**
 14. **GCA CONTACT**
 15. **PROJECT MANAGER**
 1. Change Status to: **FULL OCCUPANCY REQ**
6. FULL OCCUPANCY REQ (Personal Query)
 1. **PROJECT MANAGER**
 1. Respond to Action Items
 2. Add notes, as appropriate
 3. When ready for full occupancy, change status to : **FIRE MARSHALL REVIEW**
7. ISSUED FULL– *Workflow: Information Only*
 1. **PROJECT MANAGER**
 2. **UA PLANT FUNDS**
 3. **RISK AND PROPERTY**
 4. **DIRECTOR PUBLIC SAFETY**
 5. **GEOSPL SYSTEMS MGR**
 6. **BAM DIRECTOR**
 7. **EHS DIRECTOR**
 8. **DIRECTOR FM**
 9. **DIRECTOR FACILITIES**
 10. **DIRECTOR LRFP**
 11. **ASSOC DIR LRFP**
 12. **PROJECT AD**
 13. **DIRECTOR ACCOUNTING**
 14. **GCA MANAGER**
8. DENIED
9. CANCELED

INTERNAL WORK AGREEMENT

Since work order transactions are not awarded or allocated like CPPM contracts, the Internal Work Agreement Screen was created to address this need. This screen formalizes the agreement between project managers and internal O&M managers to provide work for capital projects. This screen associates components to phases and identifies the amount of committed cost for a given agreement line item (costs roll up to both the capital project and the work order, respectively). As phase transactions are approved, committed cost on the capital project is reduced while the expensed amount increases.

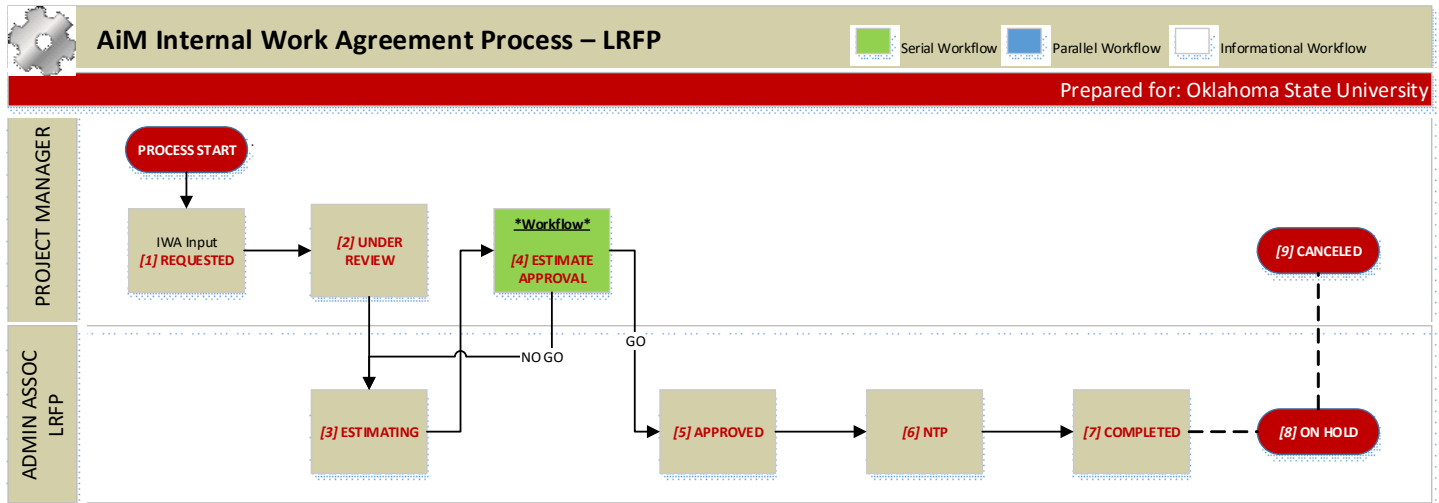
The capital project, component group, and component are required to save the initial record.

Creating internal work agreements, with defined committed cost, will produce the following transactions on the associated component budget and roll up to the component group and capital project budgets:

1. Saving the agreement in an open status creates an associated anticipated cost on the capital project.
2. Finalizing the agreement shifts the capital project anticipated cost to committed cost.
3. As transactions are approved on the work order/phase, the capital project committed cost shifts to expensed costs.

When the capital project, component group, and component are entered on a phase, the associated finalized internal work agreement appears in the Phase Contractor Block. Once the phase is saved, a detail line is added to the internal work agreement work order detail section. This line has work order/phase hyperlinks to view pertinent work order/phase data.

Internal Work Agreement Approval Process - All LRFPA IWA Types (Services provided for PROJECT ADMIN/ARCH/INT DES)



LRFP IWA PROCESS DOCUMENTATION

1. REQUESTED
 1. ADMIN ASST FMCS/ADMIN ASSOC LRFP/PROJECT MANAGER FMCS
 1. Create IWA in AiM
 2. Select appropriate type
 3. Select the project
 4. Add necessary line items
 1. In Line Item, tie to component group and component
 - a. Note: Component must be active
 2. Enter commitment amount
 5. Enter request date
 6. Change status to:
 1. If PM review required change status to: **UNDER REVIEW**
 2. If PM review not required change status to: **ESTIMATING**
 2. UNDER REVIEW
 1. PROJECT MANAGER
 1. Review IWA (Scope statement, etc.)

Note: Scope needs to clearly state whether procurement costs are to be included.
 2. Change status to **ESTIMATING**
 3. ESTIMATING – Personal Query
 1. ADMIN ASSOC LRFP
 1. Assign IWA Manager/employee

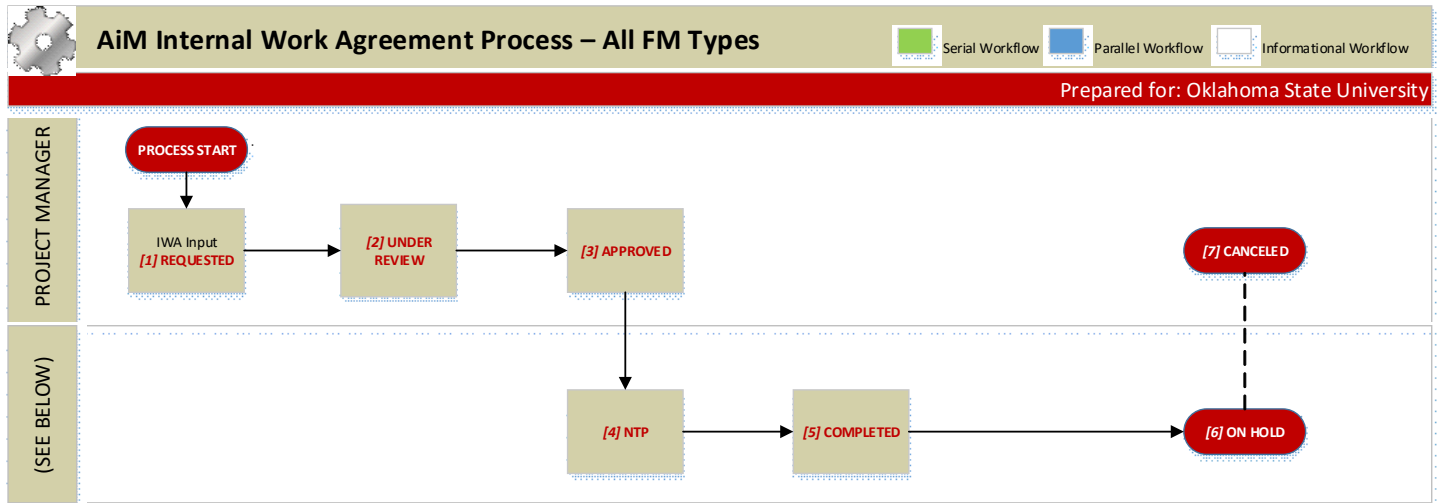
(If LRFP fees, IWA Manager/Employee will be ADMIN ASSOC LRFP)
 2. IWA Manager/Employee (Interior Designer, Architect, Inspector, or Assoc Dir LRFP)
 1. Review IWA on personal query
 2. Develop estimate
 3. Attach estimate to IWA (Interior design services, furnishings procurement, etc.)
 4. If unable to provide estimate, enter note on IWA
 5. Change status to **ESTIMATE APPROVAL**
 4. ESTIMATE APPROVAL – Workflow: Serial; Go Status: **APPROVED**; No Go Status: **ESTIMATING**
 1. PROJECT MANAGER
 1. Enter/update Project Component Budget as needed (budget revision)



AiM™ CPPM Standard Operation Procedures

2. Enter estimate amount on IWA line(s)
3. If estimate not accepted (scope revision needed, etc.) add note to IWA
4. Respond to Workflow
5. APPROVED – Personal Query
 1. **ADMIN ASSOC LRF**
 1. Enter commitment date
 2. When work is ready to proceed, add start date and change status to **NTP**
6. NTP – Personal Query
 1. **ADMIN ASSOC LRF**
 1. Create and link work order/phases to IWA
Important: If procurement is included in scope of IWA, the PO has to be processed against the WO. If procurement is outside the scope of the IWA, the PO will be executed directly against the CP Component.
 2. Close work orders when work is completed
7. COMPLETED (*To be executed during project closeout*)
8. ON HOLD
9. CANCELED
10. CANCELED

Internal Work Agreement Approval Process – All FM Types



FM IWA PROCESS DOCUMENTATION

NOTE 1: Before initiating IWA, follow standard CMMS estimating process. The Project Manager will use AiM customer request screen (<https://workorder.okstate.edu/Customer/Request>) to use specific problem codes that will only be used for estimates (training Document CS-02). The PM will select a problem of ESTIMATE and the INTERNAL: PM REQUEST options will become available to select. The PM will submit an individual request for each shop that support is needed. Work Control will then use this request and problem code to generate an estimate work order to whatever FM shop is needing to give an estimate.

NOTE 2: Under Status #4, NTP, the Responsibility changes with respect the IWA FM Type, as shown below, highlighted in **red**.

1. REQUESTED

1. PROJECT MANAGER/CONTRACT SPECIALIST/ADMIN ASSOC LRF

1. Create IWA and reference the estimate that was provided by the above work order
2. Select appropriate type
3. Select the project
4. Add necessary line items
 1. In Line Item, tie to component group and component
 - a. Note: Component must be active
 2. Enter commitment amount
5. Enter request date
6. Change status to **UNDER REVIEW OR APPROVED**

2. UNDER REVIEW

1. PROJECT MANAGER

1. Review IWA (Scope statement, etc.)
2. Attaches estimate as related document (from note 1 above)
3. See training Document ES-02: Estimating – CPPM IWA Review, approval and NTP
 1. Sets status of the ESTIMATE PHASE of the WORK ORDER to ESTIMATE APPROVED
4. If estimate previously received and approved, enter amounts from estimate and change status to **APPROVED**

3. APPROVED – (Personal Query)



AiM™ CPPM Standard Operation Procedures

1. PROJECT MANAGER

1. When work is ready to proceed, change status to **NTP**

4. NTP – (Personal Query)

1. **IN HOUSE CONST MGR** (Replace responsibilities with corresponding “Type” below)

1. Request Work Control to create necessary phases to proceed with the work outlined in the estimate

1. Link each phase to the IWA

2. See training Document ES-02

5. COMPLETED (To be executed during project closeout)

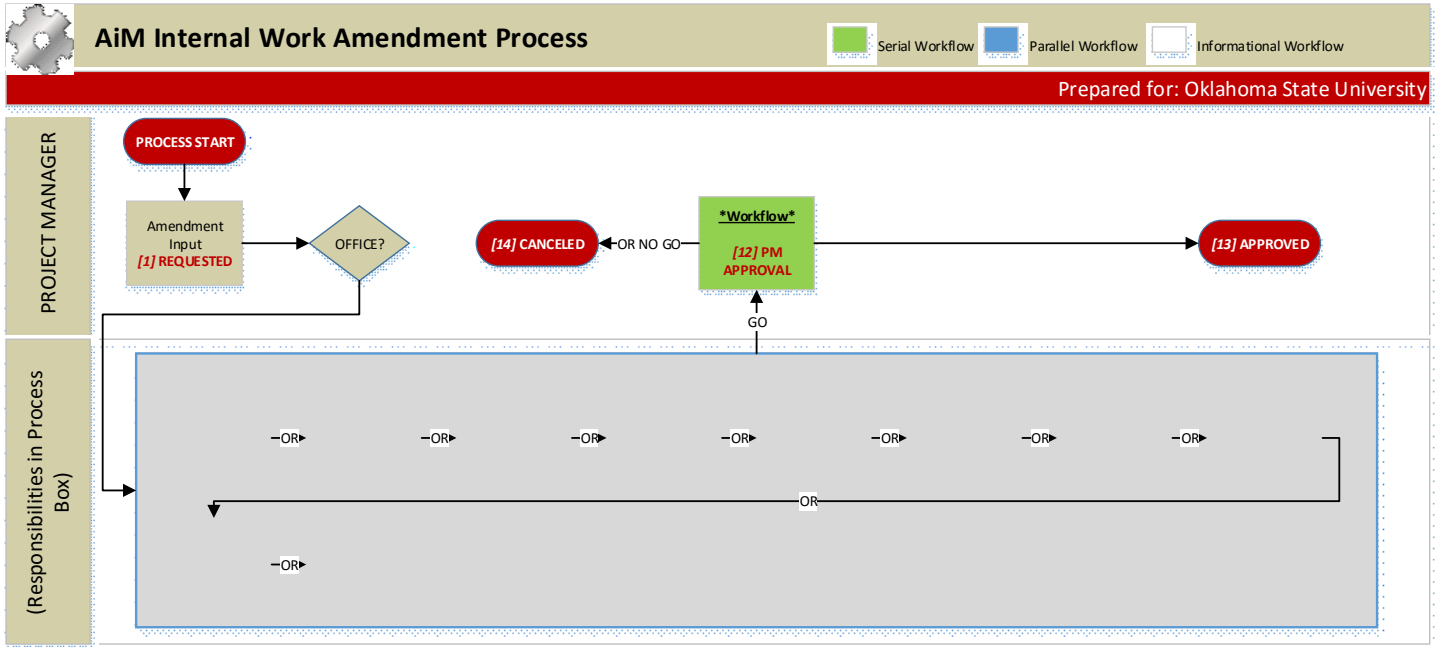
6. ON HOLD

7. CANCELED

Responsibilities to replace based on IWA Type:

FM IN HOUSE:	IN HOUSE CONST MGR
FM MEP:	CT MEP MANAGER
FM STRUCTURAL:	CT STRUCTURAL MGR
FM SUPPORT SHOP:	FSS MANAGER
FM LANDSCAPING:	LANDSCAPE ASST MGR
FM UTIL DIST:	DISTRIBUTION SYS MGR
FM ELECT DIST:	DISTRIBUTION SYS MGR
FM ASBESTOS:	ASBESTOS MGR
EHS:	EHS MANAGER
IT:	IT RESPONSIBILITY

Internal Work Amendment Process



INTERNAL WORK AMENDMENT PROCESS DOCUMENTATION

1. REQUESTED
 1. **PROJECT MANAGER**
 1. Create Amendment in AiM
 2. Change status to **(APPROPRIATE OFFICE) REVIEW**
2. FMCS REVIEW – *Workflow: Serial; Go Status: PM APPROVAL; No Go Status: CANCELED*
 1. **IN HOUSE CONST MGR**
 1. Review Amendment
 2. Respond to Workflow
3. CT MEP REVIEW – *Workflow: Serial; Go Status: PM APPROVAL; No Go Status: CANCELED*
 1. **CT MEP MANAGER**
 1. Review Amendment
 2. Respond to Workflow
4. CT STRUCTURAL REVIEW – *Workflow: Serial; Go Status: PM APPROVAL; No Go Status: CANCELED*
 1. **CT STRUCTURAL MGR**
 1. Review Amendment
 2. Respond to Workflow
5. SUPPORT SHOPS REVIEW – *Workflow: Serial; Go Status: PM APPROVAL; No Go Status: CANCELED*
 1. **FSS MANAGER**
 1. Review Amendment
 2. Respond to Workflow
6. LANDSCAPE REVIEW – *Workflow: Serial; Go Status: PM APPROVAL; No Go Status: CANCELED*
 1. **LANDSCAPE SVC MGR**
 1. Review Amendment
 2. Respond to Workflow
7. UTILITIES REVIEW – *Workflow: Serial; Go Status: PM APPROVAL; No Go Status: CANCELED*
 1. **DISTRIBUTION SYS MGR**



AiM™ CPPM Standard Operation Procedures

1. Review Amendment
2. Respond to Workflow
8. ASBESTOS REVIEW – *Workflow: Serial; Go Status: **PM APPROVAL**; No Go Status: **CANCELED***
 1. **ASBESTOS MGR**
 1. Review Amendment
 2. Respond to Workflow
9. EHS REVIEW – *Workflow: Serial; Go Status: **PM APPROVAL**; No Go Status: **CANCELED***
 1. **EHS MANAGER**
 1. Review Amendment
 2. Respond to Workflow
10. LRFPP REVIEW – *Workflow: Serial; Go Status: **PM APPROVAL**; No Go Status: **CANCELED***
 1. **ADMIN ASSOC LRFPP**
 1. Review Amendment
 2. Respond to Workflow
11. IT REVIEW – *Workflow: Serial; Go Status: **PM APPROVAL**; No Go Status: **CANCELED***
 1. **IT RESPONSIBILITY TBD**
 1. Review Amendment
 2. Respond to Workflow
12. PM APPROVAL – *Workflow: Serial; Go Status: **APPROVED**; No Go Status: N/A*
 1. **PROJECT MANAGER**
 1. Review Amendment
 2. Make budget adjustments accordingly
 3. Respond to Workflow
13. APPROVED
14. CANCELED

CONTRACT ADMINISTRATION BUSINESS PROCESS FRAMEWORK

The Business Process Framework utilized by Oklahoma State University for a CPPM Module based contract is based on the functionality of Consultant Contracts with their associated Consultant Contract Amendments and Construction Contracts with their associated documented Capital Project Issues, Construction Contract Change Order Proposals, and Construction Contract Change Orders.

CAPITAL PROJECT CONSULTANT CONTRACTS

The Consultant Contract is the mechanism that is used to classify, track, cost, and report on the consulting services that are linked to a capital project. Consultant Contracts are typically further classified by Consultant Contract Types to provide additional granularity for reporting purposes. The Consultant Contract is typically used during the design phase of the project lifecycle (depending upon delivery method), and for all professional services utilized on the project.

A Consultant Contract Line Item detail record that is based on a Capital Project Component is required to create and save a Consultant Contract. Consultant Contract Line Items link to Capital Project Components and contain the award amount to be applied as a committed cost to the Capital Project Component.

A Consultant Contract can be created and saved in an “Open” status without specifying the contractor (vendor) that is going to perform the consulting services against the Capital Project.

The Consultant Contract uses an Amendment to document changes for monetary amounts and/or date revisions.

Retainage and Subcontractor activity is not tracked on a Consultant Contract.

The Consultant Contract does not require a “Notice to Proceed” validation step; the “Award” step is required to enable processing Consultant Contract Invoices against the Consultant Contract or to create a Consultant Contract Amendment.

Consultant Contract Types

The statuses are filtered by consultant contract type code. The type can optionally be set up to produce hard errors preventing processing of expenses when expenses exceed the encumbrance amounts at both the account and funding source level. This block also captures the capital project and reference number.

Consultant Contract Types have been defined in the system as follows:

1. LRFP
2. UTILITIES
3. ON-CALL LRFP
4. ON-CALL LANDSCAPE
5. ON-CALL FMCS
6. ON-CALL UTILITIES

Consultant Contract Status Codes

The Consultant Contract Status Codes have been predefined based on user business process flows determined during the implementation and are unique to each Consultant Contract Type. For the Oklahoma State University, the status codes will be the same for all Consultant Contract Types except POOLED A/E, which has its own unique set of status codes, but all statuses will be associated with a status flag.

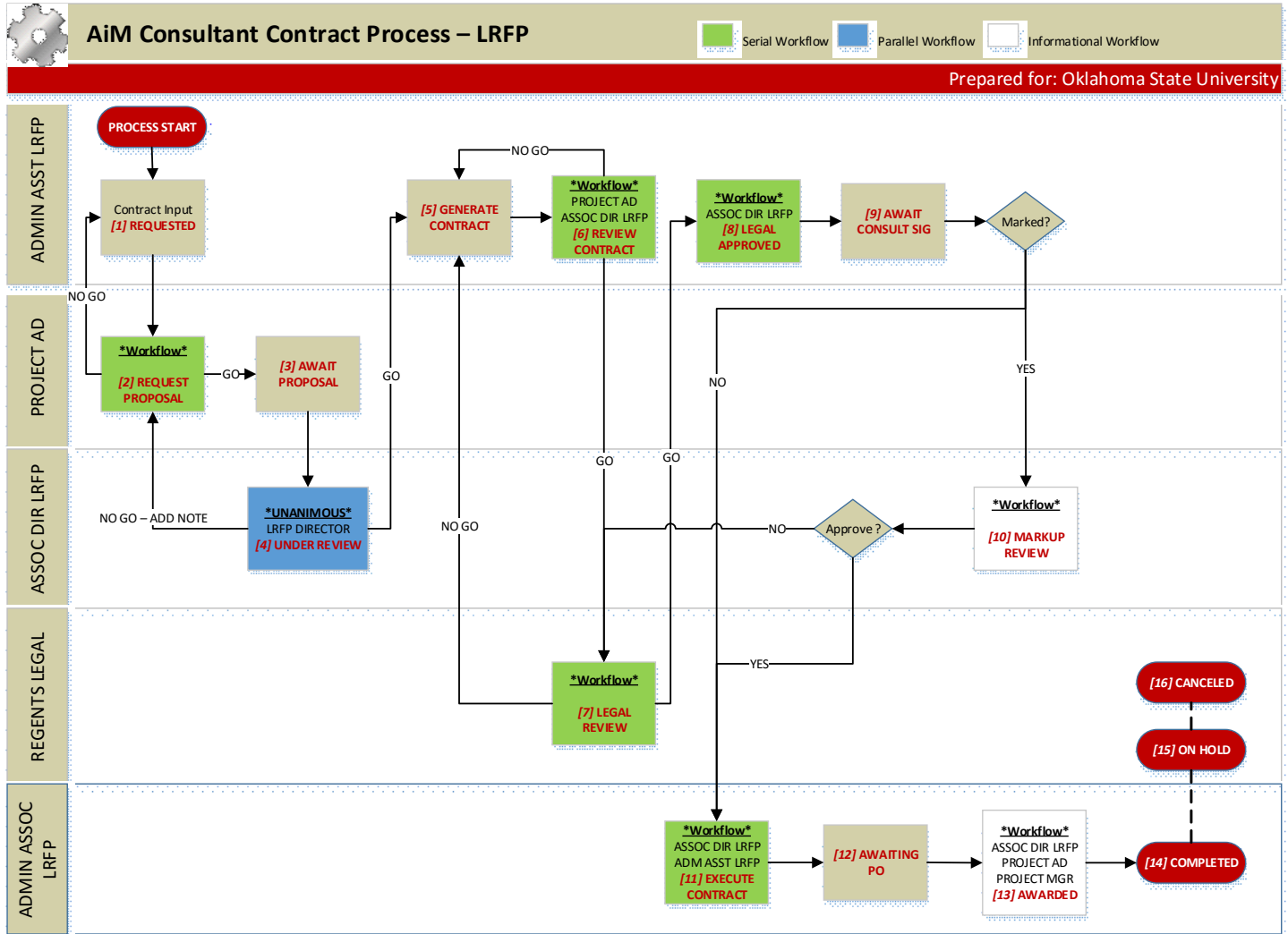


AiM™ CPPM Standard Operation Procedures

The Behavior of the Consultant Contract Status Flags is defined as follows:

Status Flag	Actions
Open	This status flag allows edits but the contract cannot be invoiced against until awarded. All accounts and funding sources from the associated capital project are available in account setup to allow encumbrances to be applied quickly.
Awarded	This status flag locks down the contract data and allows invoices to be processed. Any changes to dates or award amounts would now require an amendment. Any changes to encumbrances would require a contract encumbrance adjustment transaction.
Closed	No edits are allowed and all remaining encumbrances (if any) are relieved. Invoices can no longer be posted against this contract.
Canceled	No edits are allowed and all remaining encumbrances (if any) are relieved. Invoices can no longer be posted against this contract.

Consultant Contract Approval Process - LRFPP



LRFP CONSULTANT CONTRACT PROCESS DOCUMENTATION

1. REQUESTED

1. ADMIN ASST LRFPP

1. Check to see if Contractor is in AiM, if not enter Contractor, Contacts, etc.
2. Enter
 1. Contract Number (auto-assigned)
 2. Description
 3. Type = LRFP
 4. Capital Project
 5. Status will default to REQUESTED
 6. Contractor and Address Code
 7. Requested Date
 8. Line Item(s)
 - a. Description
 - b. Line Group
 - c. Component Group/Component

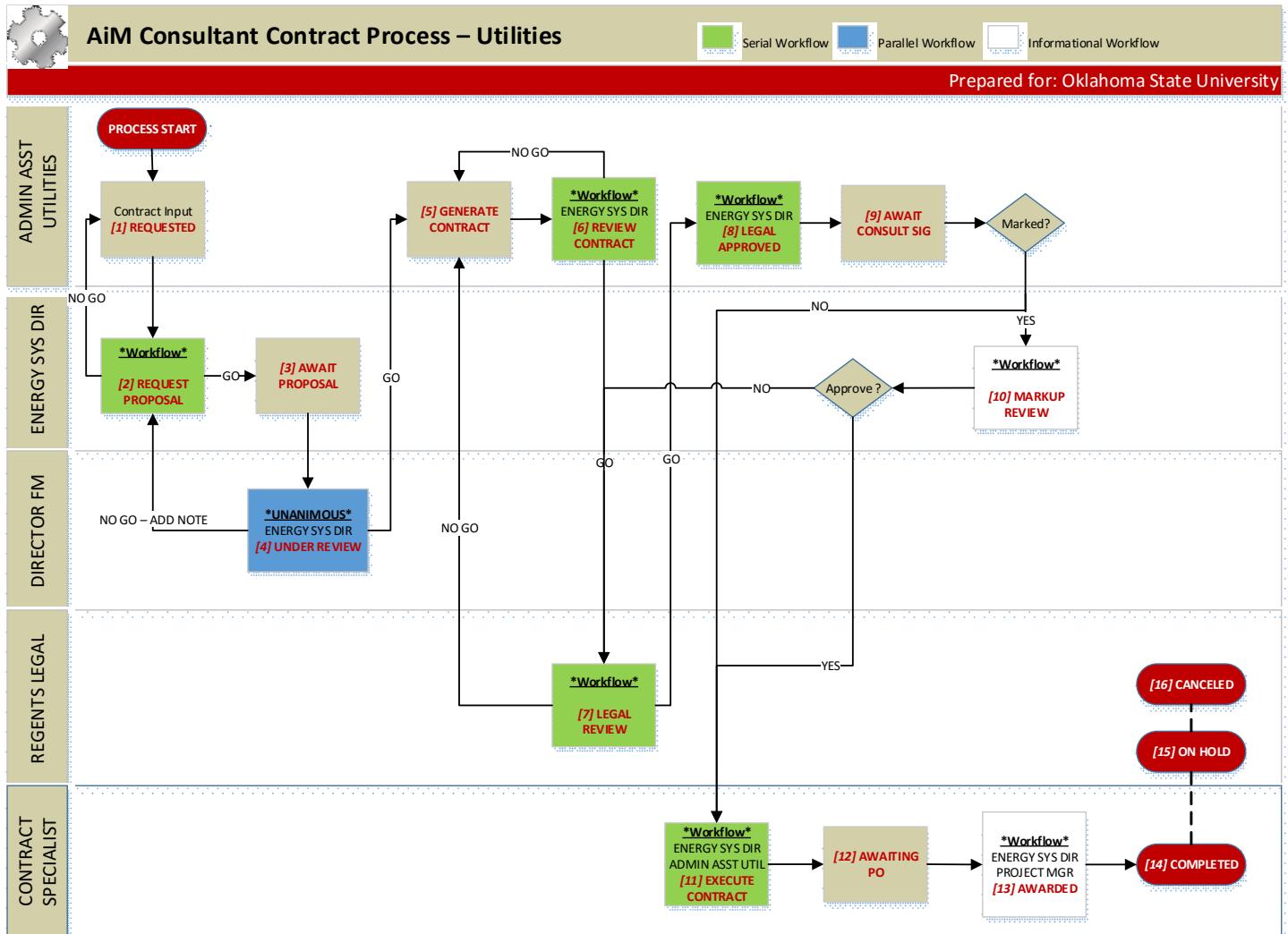
- d. Leave Award Amount blank
 3. Change Status to **REQUEST PROPOSAL**
2. REQUEST PROPOSAL – *Workflow: Serial; Go Status: **AWAIT PROPOSAL**; No Go Status: **REQUESTED***
 1. **PROJECT AD**
 1. Review Component Groups/Component(s)
 2. Request Proposal from Consultant
 3. Attach document/email to Contract record in AiM
3. AWAIT PROPOSAL
 1. **PROJECT AD**
 1. When Proposal received, attach to contract in AiM
 2. DO NOT enter amount(s) at this time.
 3. Change Status to **UNDER REVIEW**
4. UNDER REVIEW – *Workflow: Parallel – Unanimous; Go Status: **GENERATE CONTRACT**; No Go Status: **REQUEST PROPOSAL***
 1. **ASSOC DIR LRFP**
 1. If no go response, add note
 2. **DIRECTOR LRFP**
 1. If no go response, add note
5. GENERATE CONTRACT
 1. **ADMIN ASST LRFP**
 1. Update award amounts on contract in AiM
 2. Generate Contract documents and attach as related document
 3. Change status to **REVIEW CONTRACT**
6. REVIEW CONTRACT – *Workflow: Serial; Go Status: **LEGAL REVIEW**; No Go Status: **GENERATE CONTRACT***
 1. **PROJECT AD**
 2. **ASSOC DIR LRFP**
 3. **ADMIN ASST LRFP**
 1. Respond to Workflow
7. LEGAL REVIEW – *Workflow: Serial; Go Status: **LEGAL APPROVED**; No Go Status: **GENERATE CONTRACT***
 1. **REGENTS LEGAL**
 1. Review Contract
 2. If document is redlined, attach to Contract in AiM
8. LEGAL APPROVED - *Workflow: Serial; Go Status: **AWAITING CONSULT SIG**; No Go Status: N/A*
 1. **ASSOC DIR LRFP**
 2. **ADMIN ASST LRFP**
 1. Send Contract to consultant for signature
 2. Respond to Workflow
9. AWAIT CONSULT SIG
 1. **ADMIN ASST LRFP**
 1. When signed Contract received, attach as related document
 1. If marked up, change status to **MARKUP REVIEW**
 2. If not marked up, Change status to **EXECUTE CONTRACT**
10. MARKUP REVIEW – *Workflow: Informational Only*
 1. **ASSOC DIR LRFP**
 1. Review comments
 2. Change status:
 1. **LEGAL REVIEW**
 2. **EXECUTE CONTRACT**
11. EXECUTE CONTRACT – *Workflow: Serial; Go Status: **AWAITING PO**; No Go Status: N/A*
 1. **ASSOC DIR LRFP**



AiM™ CPPM Standard Operation Procedures

1. Sign contract
2. **ADMIN ASST LRFP**
 1. Attach copy of executed contract in AiM
 2. Send hard copy of signed contract to REGENTS LEGAL
 3. Send hard copy of signed contract to Consultant
3. **ADMIN ASSOC LRFP**
 1. Enter Award Amount on the line item
 2. Update Contract Award Date
 3. Setup Contract Accounts in AiM
 4. Enter data into SciQuest (OKCorral), beginning an external process to AiM
 1. Attach board approval to the requisition in SciQuest
 5. Change status to **AWAITING PO**
12. AWAITING PO
 1. **ADMIN ASSOC LRFP**
 1. Monitor personal query until PO has been issued
 2. Once PO is issued
 1. Enter PO Number in AiM Contract Reference Number
 2. Update Contract Start Date (End date optional)
 3. Change status to **AWARDED**
13. AWARDED – *Workflow: Informational Only*
 1. **ASSOC DIR LRFP**
 2. **PROJECT AD**
 3. **PROJECT MANAGER**
 4. **ADMIN ASSOC LRFP**
 1. Notify Consultant to confirm receipt of the executed purchase order
 2. After final payment, change status to **COMPLETED**
14. ON HOLD
15. COMPLETED
16. CANCELED

Consultant Contract Approval Process – Utilities



UTILITIES CONSULTANT CONTRACT PROCESS DOCUMENTATION

1. REQUESTED

1. ADMIN ASST UTILITIES

1. Check to see if Contractor is in AiM, if not enter Contractor, Contacts, etc.
2. Enter
 1. Contract Number (auto-assigned)
 2. Description
 3. Type = CMAR UTILITY
 4. Capital Project
 5. Status will default to REQUESTED
 6. Contractor and Address Code
 7. Requested Date
 8. Line Item(s)
 - a. Description
 - b. Line Group
 - c. Component Group/Component

- d. Leave Award Amount blank
 3. Change Status to **REQUEST PROPOSAL**
2. REQUEST PROPOSAL – *Workflow: Serial; Go Status: **AWAIT PROPOSAL**; No Go Status: **REQUESTED***
 1. **ENERGY SYS DIRECTOR**
 1. Review Component Groups/Component(s)
 2. Request Proposal from Consultant
 3. Attach document/email to Contract record in AiM
3. AWAIT PROPOSAL
 1. **ENERGY SYS DIRECTOR**
 1. When Proposal received, attach to contract in AiM
 2. DO NOT enter amount(s) at this time.
 3. Change Status to **UNDER REVIEW**
4. UNDER REVIEW – *Workflow: Parallel – Unanimous; Go Status: **GENERATE CONTRACT**; No Go Status: **REQUEST PROPOSAL***
 1. **ENERGY SYS DIRECTOR**
 1. If no go response, add note
 2. **DIRECTOR FM**
 1. If no go response, add note
5. GENERATE CONTRACT
 1. **ADMIN ASST UTILITIES**
 1. Generate Contract documents and attach as related document
 2. Change status to **REVIEW CONTRACT**
6. REVIEW CONTRACT – *Workflow: Serial; Go Status: **LEGAL REVIEW**; No Go Status: **GENERATE CONTRACT***
 1. **ENERGY SYS DIRECTOR**
 2. **ADMIN ASST UTILITIES**
 1. Respond to Workflow
7. LEGAL REVIEW – *Workflow: Serial; Go Status: **LEGAL APPROVED**; No Go Status: **GENERATE CONTRACT***
 1. **REGENTS LEGAL**
 1. Review Contract
 2. If document is redlined, attach to Contract in AiM
8. LEGAL APPROVED - *Workflow: Serial; Go Status: **AWAITING CONSULT SIG**; No Go Status: N/A*
 1. **ENERGY SYS DIRECTOR**
 2. **ADMIN ASST UTILITIES**
 1. Send Contract to consultant for signature
 2. Respond to Workflow
9. AWAIT CONSULT SIG
 1. **ADMIN ASST UTILITIES**
 1. When signed Contract received, attach as related document
 1. If marked up, change status to **MARKUP REVIEW**
 2. If not marked up, Change status to **EXECUTE CONTRACT**
10. MARKUP REVIEW – *Workflow: Informational Only*
 1. **ENERGY SYS DIRECTOR**
 1. Review comments
 2. Change status:
 1. **LEGAL REVIEW**
 2. **EXECUTE CONTRACT**
11. EXECUTE CONTRACT – *Workflow: Serial; Go Status: **AWAITING PO**; No Go Status: N/A*
 1. **ENERGY SYS DIRECTOR**
 1. Sign contract



2. ADMIN ASST UTILITIES

1. Attach copy of executed contract in AiM
2. Send hard copy of signed contract to REGENTS LEGAL
3. Send hard copy of signed contract to Consultant

3. CONTRACT SPECIALIST

1. Enter Award Amount on the line item
2. Update Contract Award Date
3. Setup Contract Accounts in AiM
 1. Enter Offset Account
4. Enter data into SciQuest (OKCorral), beginning an external process to AiM
 1. Attach board approval to the requisition in SciQuest
5. Change status to **AWAITING PO**

12. AWAITING PO

1. CONTRACT SPECIALIST

1. Monitor personal query until PO has been issued
2. Once PO is issued
 1. Enter PO Number in AiM Contract Reference Number
 2. Update Contract Start Date (End date optional)
 3. Change status to **AWARDED**

13. AWARDED – *Workflow: Informational Only*

1. ENERGY SYS DIRECTOR

2. PROJECT MANAGER

3. CONTRACT SPECIALIST

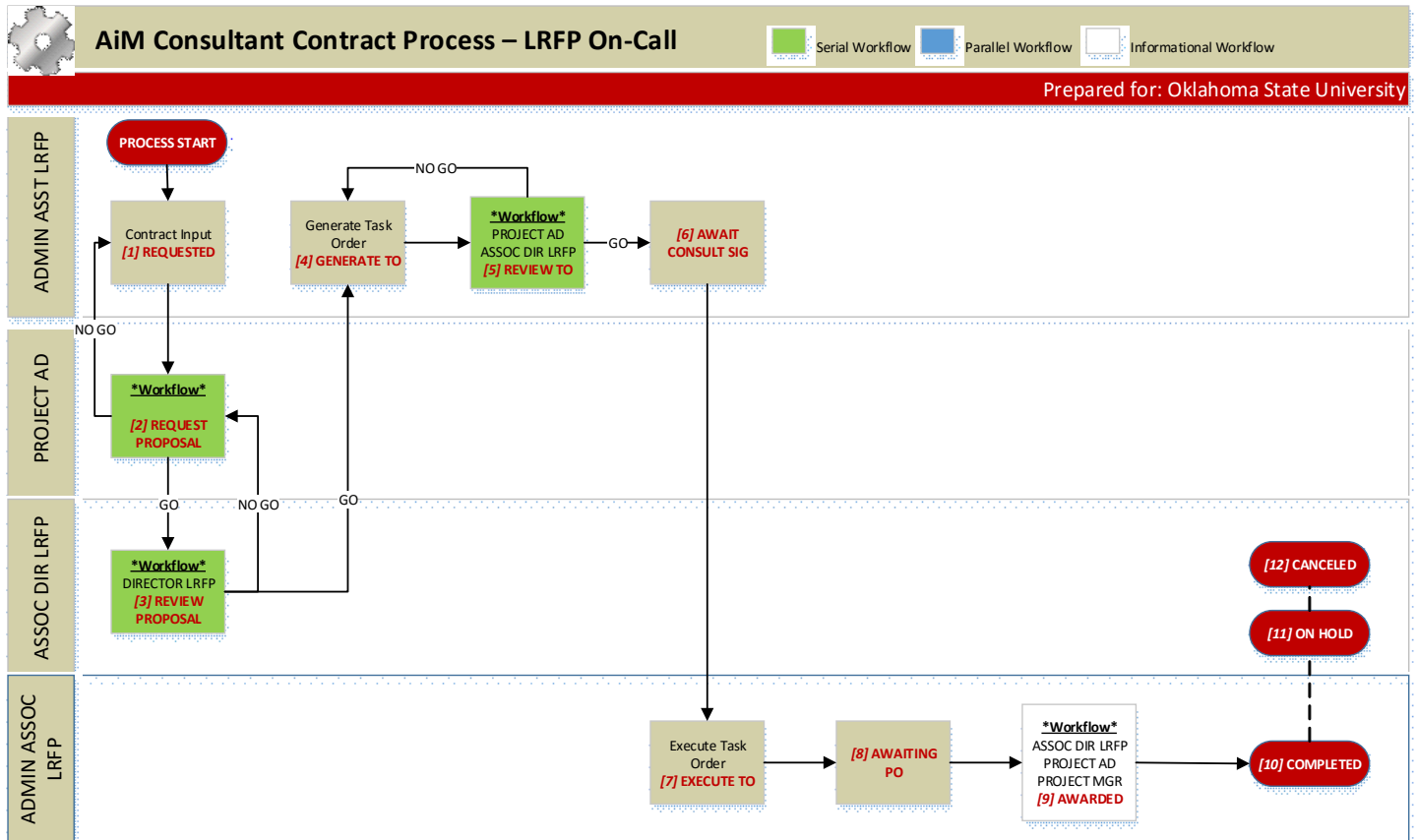
1. Notify Consultant to confirm receipt of the executed purchase order
2. After final payment, change status to **COMPLETED**

14. ON HOLD

15. COMPLETED

CANCELED

Consultant Contract Approval Process – LRFP On-Call



LRFP ON-CALL CONSULTANT CONTRACT PROCESS DOCUMENTATION

1. REQUESTED

1. ADMIN ASST LRFP

1. Check to see if Contractor is in AiM, if not enter Contractor, Contacts, etc.

2. Enter

1. Contract Number (auto-assigned)
2. Description
3. Type = LRFP
4. Capital Project
5. Status will default to REQUESTED
6. Contractor and Address Code
7. Requested Date
8. Line Item(s)
 - a. Description
 - b. Line Group
 - c. Component Group/Component
 - d. Leave Award Amount blank

3. Change Status to **REQUEST PROPOSAL**

2. REQUEST PROPOSAL – Workflow: Serial; Go Status: **REVIEW PROPOSAL**; No Go Status: **REQUESTED**

1. PROJECT AD

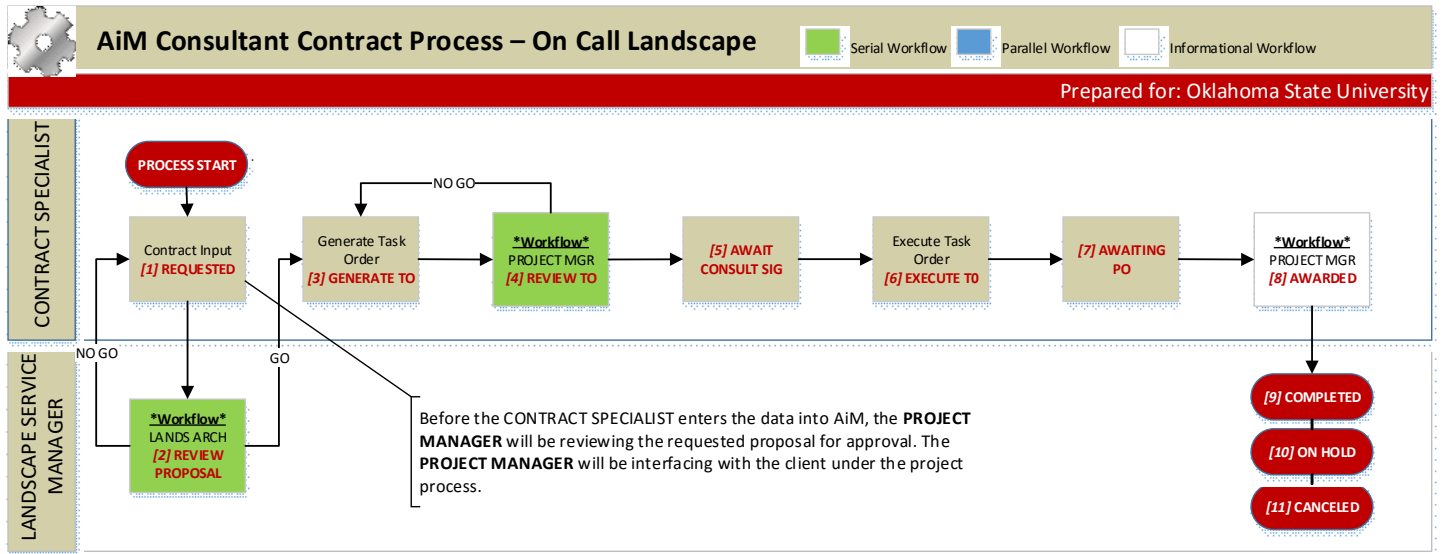
1. Proposal requested



AiM™ CPPM Standard Operation Procedures

2. Review proposal for approval
3. Attach proposal as related document
4. Change status to **REVIEW PROPOSAL**
3. REVIEW PROPOSAL – *Workflow: Serial; Go Status: GENERATE TO; No Go Status: REQUEST PROPOSAL*
 1. **DIRECTOR LRFP**
 2. **ASSOC DIR LRFP**
 1. Respond to Workflow
4. GENERATE TO
 1. **ADMIN ASST LRFP**
 1. Generate TO and attach as related document
 2. Change status to **REVIEW TO**
5. REVIEW TO – *Workflow: Serial; Go Status: AWAIT CONSULT SIG; No Go Status: GENERATE TO*
 1. **PROJECT AD**
 2. **ASSOC DIR LRFP**
 3. **ADMIN ASST LRFP**
 1. Send TO to consultant for signature
 2. Respond to Workflow
6. AWAIT CONSULT SIG
 1. **ADMIN ASST LRFP**
 1. When signed TO received, attach as related document
 1. Change status to **EXECUTE TO**
7. EXECUTE TO
 1. **ADMIN ASSOC LRFP**
 1. Setup Contract Accounts in AiM
 1. Enter Offset Account
 2. Enter data into SciQuest (OKCorral), beginning an external process to AiM
 3. Change status to **AWAITING PO**
8. AWAITING PO
 1. **ADMIN ASSOC LRFP**
 1. Monitor personal query until PO has been issued
 2. Once PO is issued
 1. Enter PO Number in AiM Contract Reference Number
 2. Update Contract Start Date (End date optional)
 3. Change status to **AWARDED**
9. AWARDED – *Workflow: Informational Only*
 1. **ASSOC DIR LRFP**
 2. **PROJECT AD**
 3. **PROJECT MANAGER**
 4. **ADMIN ASSOC LRFP**
 1. Notify Consultant to confirm receipt of the executed purchase order
 2. After final payment, change status to **COMPLETED**
10. COMPLETED
11. ON HOLD
12. CANCELED

Consultant Contract Approval Process – Landscape On-Call



LANDSCAPE ON-CALL CONSULTANT CONTRACT PROCESS DOCUMENTATION

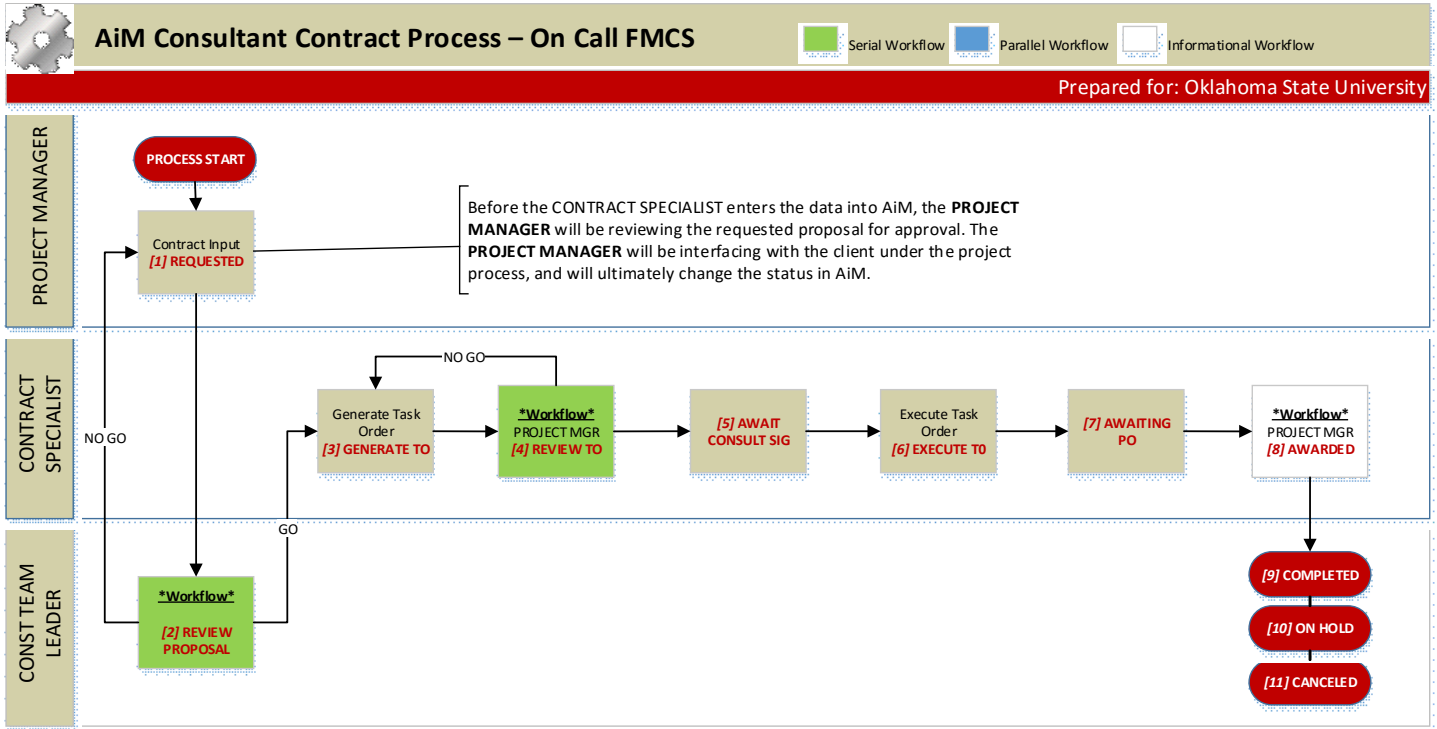
1. REQUESTED (*Personal Query*)
 1. **PROJECT MANAGER**
 1. Proposal requested
 2. Review proposal for approval
Note: Project Manager will be interfacing with the client under the project process (rf. estimate approval process.)
 2. **CONTRACT SPECIALIST**
 1. Enter
 1. Contract Number (auto-assigned)
 2. Description
 3. Type = ON-CALL LANDSCAPE
 4. Capital Project
 5. Status will default to REQUESTED
 6. Contractor and Address Code
 7. Requested Date
 8. Line Item(s)
 - a. Description
 - b. Line Group
 - c. Component Group/Component
 - d. Leave Award Amount blank
 2. Attach proposal as related document
 3. Change status to **REVIEW PROPOSAL**
2. REVIEW PROPOSAL – *Workflow: Serial; Go Status: GENERATE TO; No Go Status: REQUESTED*
 1. **LANDSCAPE ARCH**
 1. Review proposal for accuracy
 2. **LANDSCAPE SVS MGR**
 1. Review proposal for approval
 2. Responds to workflow
3. GENERATE TO (*Personal Query*)



AiM™ CPPM Standard Operation Procedures

1. **CONTRACT SPECIALIST**
 1. Generate TO and attach as related document
 2. Change status to **REVIEW TO**
4. REVIEW TO – *Workflow: Serial; Go Status: **AWAIT CONSULT SIG**; No Go Status: **GENERATE TO***
 1. **PROJECT MANAGER**
 2. **CONTRACT SPECIALIST**
 1. Send TO to consultant for signature
 2. Respond to Workflow
5. AWAIT CONSULT SIG (*Personal Query*)
 1. **CONTRACT SPECIALIST**
 1. When signed TO received, attach as related document
 1. Change status to **EXECUTE TO**
6. EXECUTE TO (*Personal Query*)
 1. **CONTRACT SPECIALIST**
 1. Enter Award Amount on the line item
 2. Update Contract Award Date
 3. Setup Contract Accounts in AiM
 1. Enter Offset Account
 4. Enter data into SciQuest (OKCorral), beginning an external process to AiM
 5. Change status to **AWAITING PO**
7. AWAITING PO (*Personal Query*)
 1. **CONTRACT SPECIALIST**
 1. Monitor personal query until PO has been issued
 2. Once PO is issued
 1. Enter PO Number in AiM Contract Reference Number
 2. Update Contract Start Date (End date optional)
 3. Change status to **AWARDED**
8. AWARDED – *Workflow: Informational Only*
 1. **PROJECT MANAGER**
 2. **CONTRACT SPECIALIST**
 1. Notify Consultant to confirm receipt of the executed purchase order
 2. After final payment, change status to **COMPLETED**
9. COMPLETED
10. ON HOLD
11. CANCELED

Consultant Contract Approval Process – FMCS On-Call



FMCS ON-CALL CONSULTANT CONTRACT PROCESS DOCUMENTATION

1. REQUESTED (Personal Query)

1. CONTRACT SPECIALIST

1. Enter

1. Contract Number (auto-assigned)
2. Description
3. Type = ON-CALL FMCS
4. Capital Project
5. Status will default to REQUESTED
6. Contractor and Address Code
7. Requested Date
8. Line Item(s)
 - a. Description
 - b. Line Group
 - c. Component Group/Component
 - d. Leave Award Amount blank

2. Attach proposal as related document

2. PROJECT MANAGER

1. Proposal requested

2. Review proposal for approval

Note: Project Manager will be interfacing with the client under the project process (rf. estimate approval process.)

3. Change status to **REVIEW PROPOSAL**

2. REVIEW PROPOSAL – Workflow: Serial; Go Status: **GENERATE TO**; No Go Status: **REQUESTED**

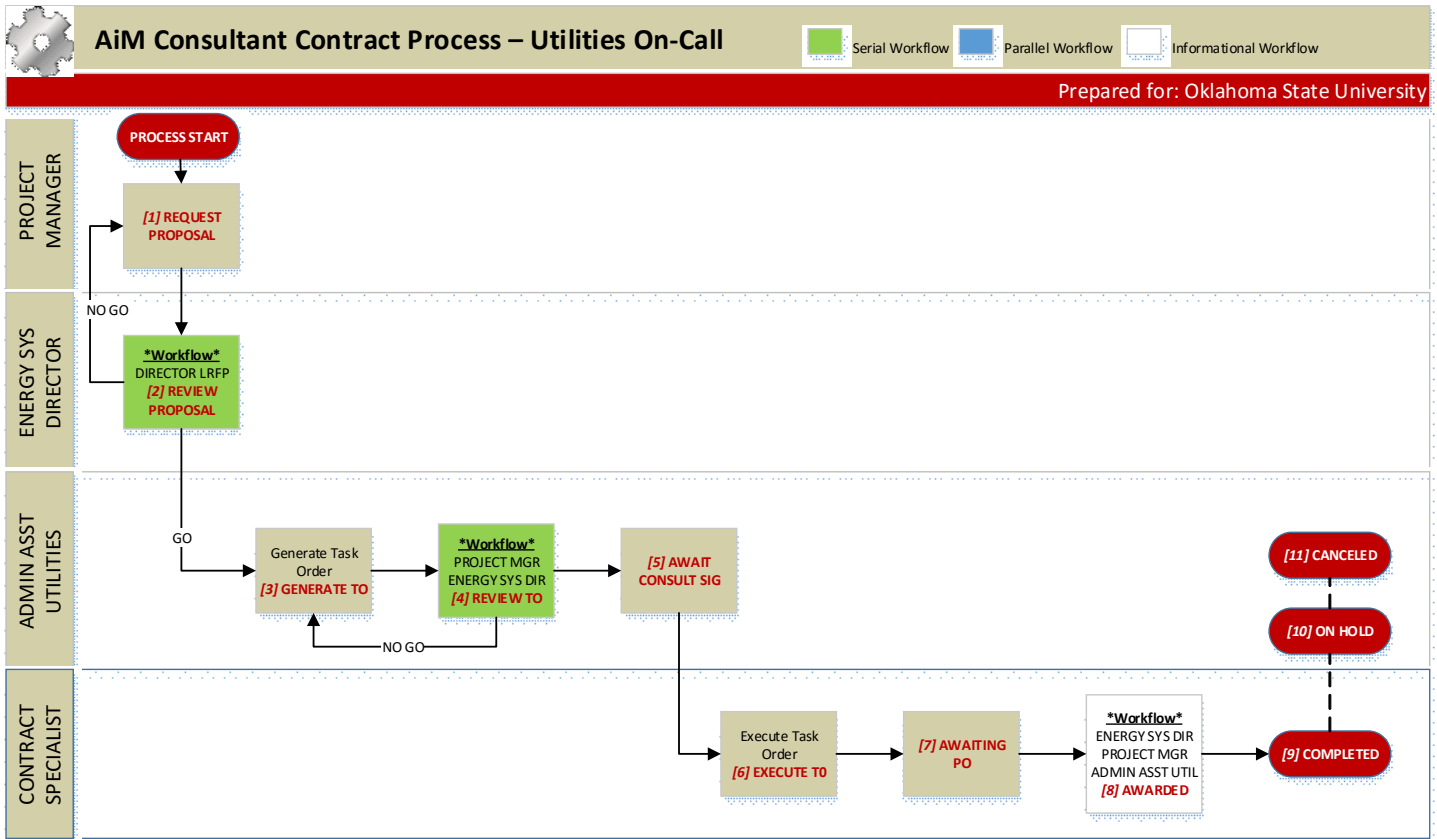
1. CONST TEAM LEADER



AiM™ CPPM Standard Operation Procedures

3. GENERATE TO
 1. **CONTRACT SPECIALIST**
 1. Generate TO and attach as related document
 2. Change status to **REVIEW TO**
4. REVIEW TO – *Workflow: Serial; Go Status: **AWAIT CONSULT SIG**; No Go Status: **GENERATE TO***
 1. **PROJECT MANAGER**
 2. **CONTRACT SPECIALIST**
 1. Send TO to consultant for signature
 2. Respond to Workflow
5. AWAIT CONSULT SIG (*Personal Query*)
 1. **CONTRACT SPECIALIST**
 1. When signed TO received, attach as related document
 1. Change status to **EXECUTE TO**
6. EXECUTE TO (*Personal Query*)
 1. **CONTRACT SPECIALIST**
 1. Enter Award Amount on the line item
 2. Update Contract Award Date
 3. Setup Contract Accounts in AiM
 1. Enter Offset Account
 4. Enter data into SciQuest (OKCorral), beginning an external process to AiM
 5. Change status to **AWAITING PO**
7. AWAITING PO
 1. **CONTRACT SPECIALIST**
 1. Monitor personal query until PO has been issued
 2. Once PO is issued
 1. Enter PO Number in AiM Contract Reference Number
 2. Update Contract Start Date (End date optional)
 3. Change status to **AWARDED**
8. AWARDED – *Workflow: Informational Only*
 1. **PROJECT MANAGER**
 2. **CONTRACT SPECIALIST**
 1. Notify Consultant to confirm receipt of the executed purchase order
 2. After final payment, change status to **COMPLETED**
9. COMPLETED
10. ON HOLD
11. CANCELED

Consultant Contract Approval Process – Utilities On-Call



UTILITIES ON-CALL CONSULTANT CONTRACT PROCESS DOCUMENTATION

1. REQUEST PROPOSAL

1. PROJECT MANAGER

1. Proposal requested
2. Review proposal for approval
3. Enter
 1. Contract Number (auto-assigned)
 2. Description
 3. Type = ON-CALL FMCS
 4. Capital Project
 5. Status will default to REQUESTED
 6. Contractor and Address Code
 7. Requested Date
 8. Line Item(s)
 - a. Description
 - b. Line Group
 - c. Component Group/Component
 - d. Leave Award Amount blank
4. Attach proposal as related document
5. Change status to **REVIEW PROPOSAL**

2. REVIEW PROPOSAL – Workflow: Serial; Go Status: **GENERATE TO**; No Go Status: **REQUEST PROPOSAL**

1. ENERGY SYS DIRECTOR



AiM™ CPPM Standard Operation Procedures

3. GENERATE TO
 1. **ADMIN ASST UTILITIES**
 1. Generate TO and attach as related document
 2. Change status to **REVIEW TO**
4. REVIEW TO – *Workflow: Serial; Go Status: **AWAIT CONSULT SIG**; No Go Status: **GENERATE TO***
 1. **PROJECT MANAGER**
 2. **ENERGY SYS DIRECTOR**
 3. **ADMIN ASST UTILITIES**
 1. Send TO to consultant for signature
 2. Respond to Workflow
5. AWAIT CONSULT SIG
 1. **ADMIN ASST UTILITIES**
 1. When signed TO received, attach as related document
 1. Change status to **EXECUTE TO**
6. EXECUTE TO
 1. **CONTRACT SPECIALIST**
 1. Enter Award Amount on the line item
 2. Update Contract Award Date
 3. Setup Contract Accounts in AiM
 1. Enter Offset Account
 4. Enter data into SciQuest (OKCorral), beginning an external process to AiM
 5. Change status to **AWAITING PO**
7. AWAITING PO
 1. **CONTRACT SPECIALIST**
 1. Monitor personal query until PO has been issued
 2. Once PO is issued
 1. Enter PO Number in AiM Contract Reference Number
 2. Update Contract Start Date (End date optional)
 3. Change status to **AWARDED**
8. AWARDED – *Workflow: Informational Only*
 1. **ENERGY SYS DIRECTOR**
 2. **PROJECT MANAGER**
 3. **ADMIN ASST UTILITIES**
 4. **CONTRACT SPECIALIST**
 1. Notify Consultant to confirm receipt of the executed purchase order
 2. After final payment, change status to **COMPLETED**
9. COMPLETED
10. ON HOLD
11. CANCELED



CAPITAL PROJECT CONSULTANT CONTRACT AMENDMENTS

The Consultant Contract Amendment Screen provides a mechanism to amend consultant contracts by adjusting existing line items or by creating new ones. In addition, the Amendment Screen supports the association of issues to the amendment, and subsequently to the Consultant Contract.

Users can submit changes to Consultant Contracts by either adding a line to the contract or adjustment of an existing line item.

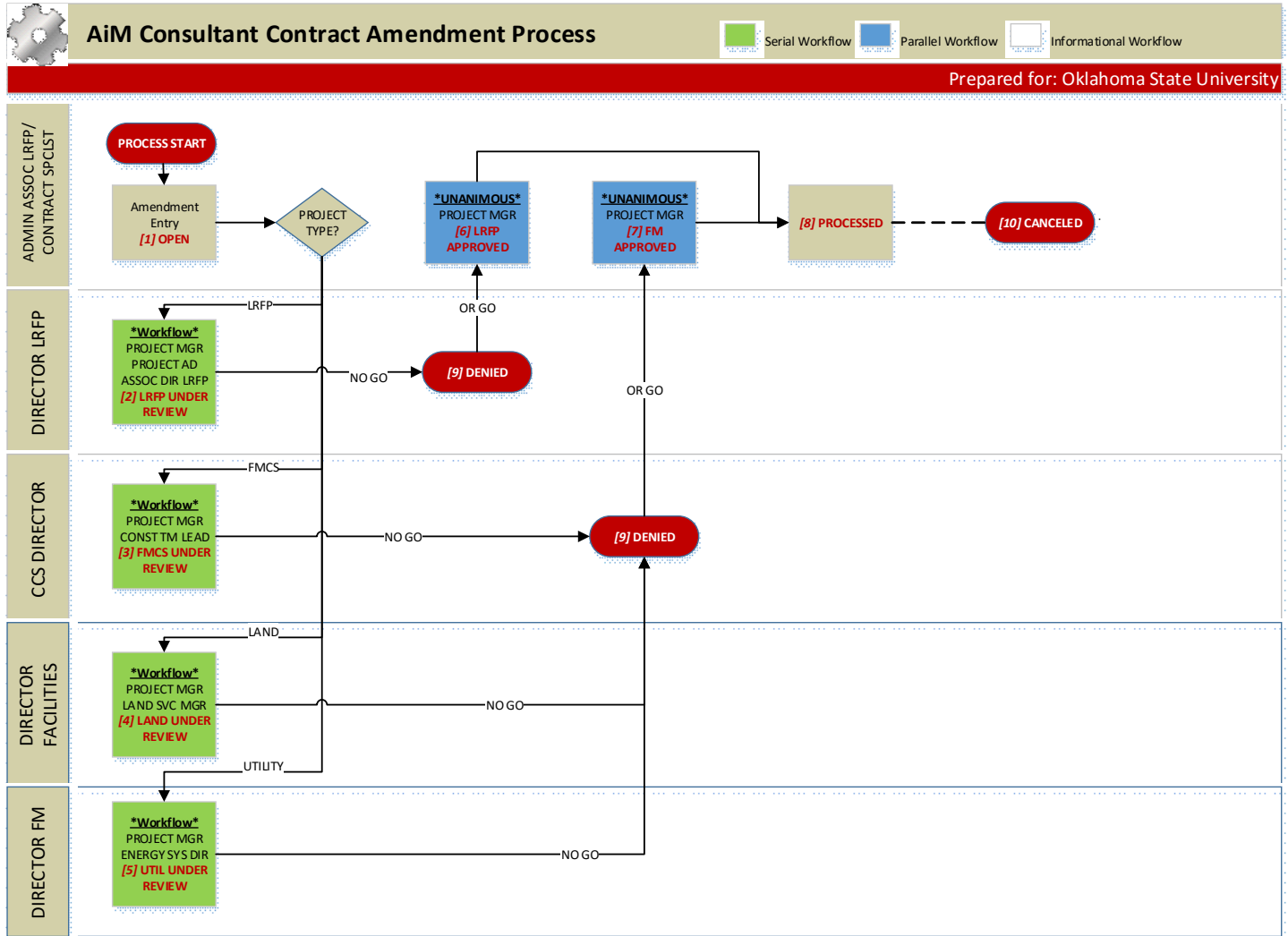
Issues associated to amendments auto populate cost fields on the Amendment Screen line items.

Saving a Consultant Contract Amendment in an open status increases anticipated cost to the Capital Project. Saving the Consultant Contract Amendment in an approved status increases the committed cost for that Capital Project and reduces the anticipated cost.

Consultant Contract Amendment is managed by status codes.

The Consultant Contract Amendment is driven by the Consultant Contract Number so it is recommended that the information contained below, as well as any electronic documentation be available when completing the Consultant Contract Amendment.

Consultant Contract Amendment Process



CONSULTANT CONTRACT AMENDMENT PROCESS DOCUMENTATION

1. OPEN

1. ADMIN ASSOC LRFP/CONTRACT SPECIALIST

1. Enter Amendment
2. Enter Line Item
 1. Choose contract line, Line item (required)
 2. Select appropriate Reason (Additional Svcs, Design Change, Owner Request, etc.)
 3. In Contract Line Total enter in amendment amount
3. Attach Amendment document and any other appropriate correspondence
4. If ADMIN ASSOC LRFP, Change status to **LRFP UNDER REVIEW**
5. If CONTRACT SPECIALIST
 1. If FMCS Project, Change status to **FMCS UNDER REVIEW**
 2. If Landscape Project, Change status to **LAND UNDER REVIEW**
 3. If Utilities Project, Change status to **UTIL UNDER REVIEW**

2. LRFP UNDER REVIEW – Workflow: Serial; Go Status: **LRFP APPROVED**, No Go Status: **DENIED**

1. PROJECT MANAGER

1. Meet with Client on scope and cost



AiM™ CPPM Standard Operation Procedures

2. **PROJECT AD**
 1. Review Amendment
3. **ASSOC DIR LRFP**
 1. Review Amendment
4. **DIRECTOR LRFP**
 1. Review Amendment
3. **FMCS UNDER REVIEW** – *Workflow: Serial; Go Status: **FM APPROVED**, No Go Status: **DENIED***
 1. **PROJECT MANAGER**
 1. Meet with Client on scope and cost
 2. **CONST TEAM LEADER**
 1. Review Amendment
 3. **CCS DIRECTOR**
 1. Review Amendment
4. **LAND UNDER REVIEW** – *Workflow: Serial; Go Status: **FM APPROVED**, No Go Status: **DENIED***
 4. **PROJECT MANAGER**
 1. Meet with Client on scope and cost
 5. **LANDSCAPE SVC MGR**
 1. Review Amendment
 6. **DIRECTOR FACILITIES**
 1. Review Amendment
5. **UTIL UNDER REVIEW** – *Workflow: Serial; Go Status: **FM APPROVED**, No Go Status: **DENIED***
 7. **PROJECT MANAGER**
 1. Meet with Client on scope and cost
 8. **ENERGY SYS DIRECTOR**
 1. Review Amendment
 9. **DIRECTOR FM**
 1. Review Amendment
6. **LRFP APPROVED** – *Workflow: Parallel-Unanimous; Go Status: **PROCESSED**, No Go Status: N/A*
 10. **PROJECT MANAGER**
 1. Initiate Budget Revision Process if needed
 11. **ADMIN ASSOC LRFP**
 1. Print Amendment report from AiM
 2. Enter change is SciQuest and attach AiM report
7. **FM APPROVED** – *Workflow: Parallel-Unanimous; Go Status: **PROCESSED**, No Go Status: N/A*
 12. **PROJECT MANAGER**
 1. Initiate Budget Revision Process if needed
 13. **CONTRACT SPECIALIST**
 1. Print Amendment report from AiM
 2. Enter change is SciQuest and attach AiM report
8. **PROCESSED**
9. **DENIED**
10. **CANCELED**

CAPITAL PROJECT CONSTRUCTION CONTRACTS

The Capital Project Construction Contracts is the mechanism that is used to classify, track, cost, and report on the construction related activities that are linked to a capital project. Construction Contracts are classified by Construction Contract Types to provide additional granularity for reporting purposes. Construction Contract Types are typically defined based upon the different delivery methods used by the Capital Project Type. The Construction Contract is typically used for the bulk of the work and the cost related to the project.

A Construction Contract Line Item detail record that is based on a Capital Project Component is required to create and save a Construction Contract. Construction Contract Line Items link to Capital Project Components and contain the award amount to be applied as a committed cost to the Capital Project Component.

The Construction Contract requires both an “AWARD” and a “NOTICE TO PROCEED” step to enable processing Construction Contract Payment Applications against the Construction Contract or to create an Issue, Construction Contract Change Order Proposal, or a Construction Contract Change Order. The Construction Contract will enable tracking of both retainage and sub-contractor activity.

Construction Contract Type

The statuses are filtered by construction contract type code. The construction contract type determines if the contract will be days based or if the end date is editable (this choice enables the construction contracts to be awarded based on the number of days required to complete the contract or based on a completion date). The type can also be optionally set up to produce hard errors (preventing processing of the expenses) when expenses exceed the encumbrance at both the account and funding source level. The capital project and reference number are captured in this block as well.

Construction Contract Types have been defined in the system as follows:

1. LRFP CMAR
2. LRFP HARD BID
3. FMCS LOW BID
4. UTILITIES CMAR
5. ENERGY SPC
6. OCCM
7. AS NEEDED

Construction Contract Status Code

The Construction Contract Status Codes have been predefined based on user business process flows determined during the implementation and are unique to each Construction Contract Type. For the Oklahoma State University, the status codes will be the same for all Construction Contract Types except POOLED CONTRUCTION, which has its own unique set of status codes, but all statuses will be associated with a status flag.

The Behavior of the Construction Contract Status Flags is defined as follows:

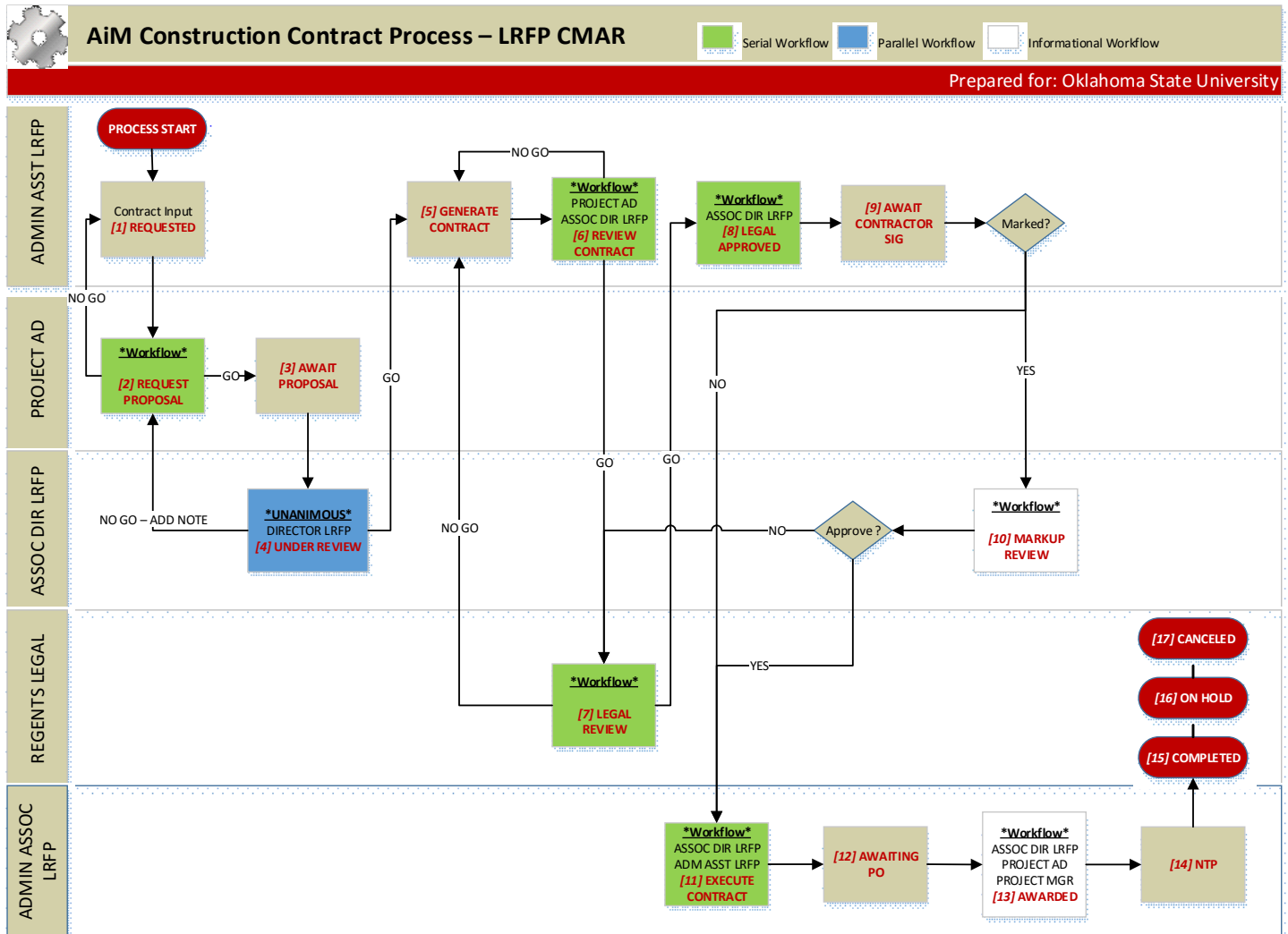
Status Flag	Actions
Open	This status flag allows edits but the contract cannot have pay applications applied until notice to proceed. All accounts and funding sources from the associated capital project are available in account setup to allow encumbrances to be applied quickly.



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Awarded	This status flag locks down the contract data but still does not allow payment applications to be processed. Any changes to dates or award amounts would now require a change order. Any changes to encumbrances would require a contract encumbrance adjustment transaction.
Notice to Proceed	This status flag signals the contract is available for processing payment applications.
Closed	No edits are allowed and all remaining encumbrances (if any) are relieved. Payment applications can no longer be posted against this contract.
Canceled	No edits are allowed and all remaining encumbrances (if any) are relieved. Payment applications can no longer be posted against this contract.

Construction Contract Approval Process – LRFP CMAR



LRFP CMAR CONSTRUCTION CONTRACT PROCESS DOCUMENTATION

1. REQUESTED

1. ADMIN ASST LRFP

1. Check to see if Contractor is in AiM, if not enter Contractor, Contacts, etc.
2. Enter

1. Contract Number (auto-assigned)
2. Description
3. Type = CMAR LRFP
4. Capital Project
5. Status will default to REQUESTED
6. Contractor and Address Code
7. Requested Date
8. Line Item(s)
 - a. Description
 - b. Line Group
 - c. Component Group/Component



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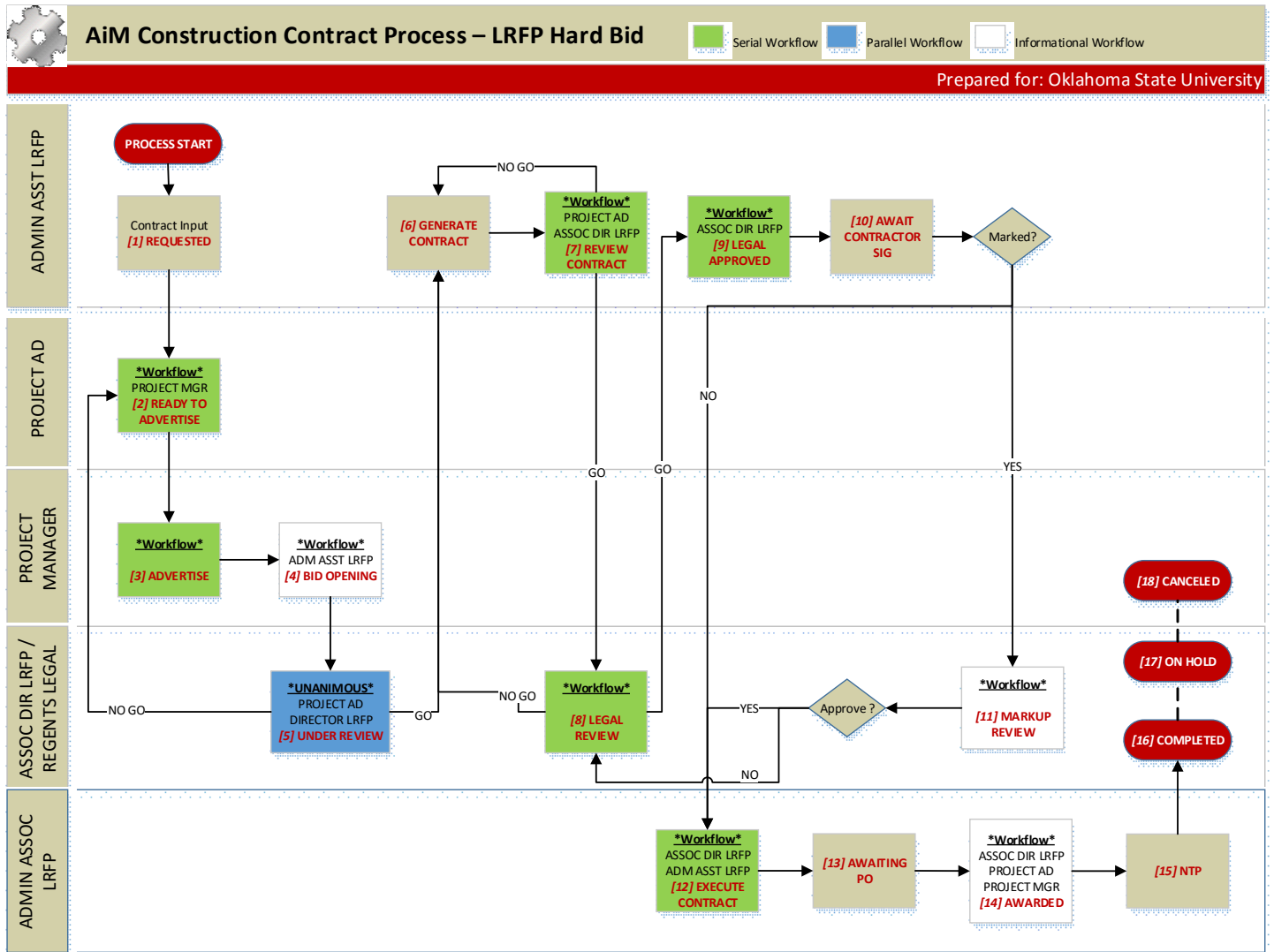
- d. Leave Award Amount blank
 3. Change Status to **REQUEST PROPOSAL**
 2. REQUEST PROPOSAL – *Workflow: Serial; Go Status: **AWAIT PROPOSAL**; No Go Status: **REQUESTED***
 1. **PROJECT AD**
 1. Review Component Groups/Component(s)
 2. Request Proposal from CMAR
 3. Attach document/email to Contract record in AiM
 4. Respond to Workflow
 3. AWAIT PROPOSAL
 1. **PROJECT AD**
 1. When Proposal received, attach to contract in AiM
 2. DO NOT enter amount(s) at this time.
 3. Change Status to **UNDER REVIEW**
 4. UNDER REVIEW – *Workflow: Parallel – Unanimous; Go Status: **GENERATE CONTRACT**; No Go Status: **REQUEST PROPOSAL***
 1. **ASSOC DIR LRFP**
 1. If no go response, add note
 2. **DIRECTOR LRFP**
 1. If no go response, add note
 5. GENERATE CONTRACT
 1. **ADMIN ASST LRFP**
 1. Update award amounts on contract in AiM
 2. Generate Contract documents and attach as related document
 3. Change status to **REVIEW CONTRACT**
 6. REVIEW CONTRACT – *Workflow: Serial; Go Status: **LEGAL REVIEW**; No Go Status: **GENERATE CONTRACT***
 1. **PROJECT AD**
 2. **ASSOC DIR LRFP**
 3. **ADMIN ASST LRFP**
 1. Respond to Workflow
 7. LEGAL REVIEW – *Workflow: Serial; Go Status: **LEGAL APPROVED**; No Go Status: **GENERATE CONTRACT***
 1. **REGENTS LEGAL**
 1. Review Contract
 2. Review notes log
 3. Add notes if needed (on additional reviews if required)
 4. If document is redlined, attach to Contract in AiM
 8. LEGAL APPROVED - *Workflow: Serial; Go Status: **AWAITING CONSULT SIG**; No Go Status: N/A*
 1. **ASSOC DIR LRFP**
 1. Review notes log
 2. **ADMIN ASST LRFP**
 1. Send Contract to CMAR for signature
 2. Respond to Workflow
 9. AWAIT CONTRACTOR SIG
 1. **ADMIN ASST LRFP**
 1. When signed Contract received, attach as related document
 1. If marked up, change status to **MARKUP REVIEW**
 2. If not marked up, Change status to **EXECUTE CONTRACT**
 3. Review notes log
 10. MARKUP REVIEW – *Workflow: Informational Only*
 1. **ASSOC DIR LRFP**
 1. Review comments



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1. If LEGAL review needed, add notes (revised version or see redlines) and change status to **LEGAL REVIEW**, if not change status to **EXECUTE CONTRACT**
11. EXECUTE CONTRACT – *Workflow: Serial; Go Status: AWAITING PO; No Go Status: N/A*
 1. **ASSOC DIR LRF**
 1. Sign contract
 2. **ADMIN ASST LRF**
 1. Attach copy of executed contract in AiM
 2. Send hard copy of signed contract to REGENTS LEGAL
 3. Send hard copy of signed contract to CMAR
 3. **ADMIN ASSOC LRF**
 1. Enter Award Amount for each contract Line Item
 2. Setup Contract Accounts in AiM
 1. Enter Offset Account
 3. Enter data into SciQuest (OKCorral), beginning an external process to AiM
 1. Attach board approval to the requisition in SciQuest
 4. Change status to **AWAITING PO**
12. AWAITING PO
 1. **ADMIN ASSOC LRF**
 1. Monitor personal query until PO has been issued
 2. Once PO is issued
 1. Enter PO Number in AiM Contract Reference Number
 2. Update Contract Start Date and End Date
 3. Change status to **AWARDED**
13. AWARDED – *Workflow: Informational Only*
 1. **ASSOC DIR LRF**
 2. **PROJECT AD**
 3. **PROJECT MANAGER**
 4. **ADMIN ASSOC LRF**
 1. Notify CMAR to confirm receipt of the executed purchase order, add note for date issued and CMAR received
 2. Change status to **NTP**
14. NTP
 1. **ADMIN ASSOC LRF**
 1. After final payment, change status to **COMPLETED**
15. ON HOLD
16. COMPLETED
17. CANCELED

Construction Contract Approval Process – LRF Hard Bid



LRFP HARD BID CONSTRUCTION CONTRACT PROCESS DOCUMENTATION

1. REQUESTED

1. ADMIN ASST LRF

1. Enter

1. Contract Number (auto-assigned)
2. Description
3. Type = LRFP HARD BID
4. Capital Project
5. Status will default to REQUESTED
6. Contractor and Address Code
7. Requested Date
8. Line Item(s)
 - a. Description
 - b. Line Group
 - c. Component Group/Component

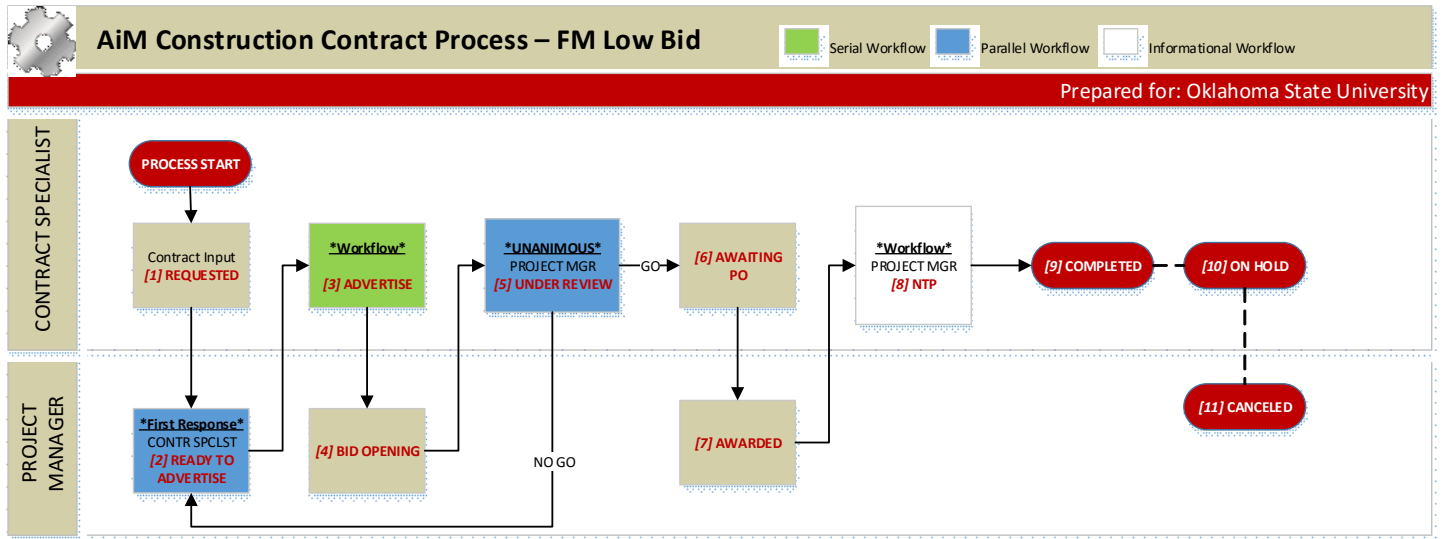
- d. Leave Award Amount blank
 2. Change Status to **READY TO ADVERTISE**
 2. **READY TO ADVERTISE** – *Workflow: Serial; Go Status: **ADVERTISE**; No Go Status: N/A*
 1. **PROJECT MANAGER**
 1. Notifies Architect to prepare advertisement
 2. **PROJECT AD**
 1. Review notification to Architect
 2. Responds to workflow
 3. **ADVERTISE** – *Workflow: Serial; Go Status: **BID OPENING**; No Go Status: N/A*
 1. **PROJECT MANAGER**
 1. Receives Bids
 2. Responds to workflow
 4. **BID OPENING** – *Workflow: Informational Only*
 1. **ADMIN ASST LRFP**
 1. Reserves room for bid opening
 2. Advertises location for bid opening
 2. **PROJECT MANAGER**
 1. Logs bids in related document
 2. Generate letter to unsuccessful bidders
 3. Change Status to **UNDER REVIEW**
 5. **UNDER REVIEW** – *Workflow: Parallel – Unanimous; Go Status: **GENERATE CONTRACT**; No Go Status: **READY TO ADVERTISE***
 1. **PROJECT AD**
 1. If no go response, add note
 2. **ASSOC DIR LRFP**
 1. If no go response, add note
 3. **DIRECTOR LRFP**
 1. If no go response, add note
 6. **GENERATE CONTRACT**
 1. **ADMIN ASST LRFP**
 1. Update award amounts on contract in AiM
 2. Generate Contract documents and attach as related document
 3. Change status to **REVIEW CONTRACT**
 7. **REVIEW CONTRACT** – *Workflow: Serial; Go Status: **LEGAL REVIEW**; No Go Status: **GENERATE CONTRACT***
 1. **PROJECT AD**
 2. **ASSOC DIR LRFP**
 3. **ADMIN ASST LRFP**
 1. Respond to Workflow
 8. **LEGAL REVIEW** – *Workflow: Serial; Go Status: **LEGAL APPROVED**; No Go Status: **GENERATE CONTRACT***
 1. **REGENTS LEGAL**
 1. Review Contract
 2. If document is redlined, attach to Contract in AiM
 9. **LEGAL APPROVED** - *Workflow: Serial; Go Status: **AWAITING CONTRACTOR SIG**; No Go Status: N/A*
 1. **ASSOC DIR LRFP**
 2. **ADMIN ASST LRFP**
 1. Send Contract to CMAR for signature
 2. Respond to Workflow
 10. **AWAIT CONTRACTOR SIG**
 1. **ADMIN ASST LRFP**
 1. When signed Contract received, attach as related document



AiM™ CPPM Standard Operation Procedures

1. If marked up, change status to **MARKUP REVIEW**
 2. If not marked up, Change status to **EXECUTE CONTRACT**
11. **MARKUP REVIEW** – *Workflow: Informational Only*
 1. **ASSOC DIR LRF**
 1. Review comments
 2. Change status:
 1. **LEGAL REVIEW**
 2. **EXECUTE CONTRACT**
12. **EXECUTE CONTRACT** – *Workflow: Serial; Go Status: **AWAITING PO**; No Go Status: N/A*
 1. **ASSOC DIR LRF**
 1. Sign contract
 2. **ADMIN ASST LRF**
 1. Attach copy of executed contract in AiM
 2. Send hard copy of signed contract to REGENTS LEGAL
 3. Send hard copy of signed contract to CONTRACTOR
 3. **ADMIN ASSOC LRF**
 1. Enter Award Amount for each contract Line Item
 2. Setup Contract Accounts in AiM
 1. Enter Offset Account
 3. Enter data into SciQuest (OKCorral), beginning an external process to AiM
 1. Attach board approval to the requisition in SciQuest
 4. Change status to **AWAITING PO**
13. **AWAITING PO**
 1. **ADMIN ASSOC LRF**
 1. Monitor personal query until PO has been issued
 2. Once PO is issued
 1. Enter PO Number in AiM Contract Reference Number
 2. Update Contract Start Date (End date optional)
 3. Change status to **AWARDED**
14. **AWARDED** – *Workflow: Informational Only*
 1. **ASSOC DIR LRF**
 2. **PROJECT AD**
 3. **PROJECT MANAGER**
 4. **ADMIN ASSOC LRF**
 1. Notify CMAR to confirm receipt of the executed purchase order
 2. Change status to **NTP**
15. **NTP**
 1. **ADMIN ASSOC LRF**
 1. After final payment, change status to **COMPLETED**
16. **COMPLETED**
17. **ON HOLD**
18. **CANCELED**

Construction Contract Approval Process – FM Low Bid



FM LOW BID CONSTRUCTION CONTRACT PROCESS DOCUMENTATION

1. REQUESTED- (*Personal Query*)

1. PROJECT MANAGER

1. Provide Contract Documents (drawings, specifications, scope of work, etc.) to CONTRACT SPECIALIST

2. CONTRACT SPECIALIST

1. Enter

1. Contract Number (auto-assigned)
2. Description
3. Type = FM LOW BID
4. Capital Project
5. Status will default to REQUESTED
6. Contractor and Address Code
7. Requested Date
8. Line Item(s)
 - a. Description
 - b. Line Group
 - c. Component Group/Component
 - d. Leave Award Amount blank

2. Change Status to **READY TO ADVERTISE**

2. READY TO ADVERTISE – *Workflow: Parallel First Response; Go Status: **ADVERTISE**; No Go Status: N/A*

1. CONTRACT SPECIALIST

1. Enter data into SciQuest (OKCorral), beginning an external process to AiM
 1. Attach board approval to the requisition in SciQuest
2. Responds to workflow

2. PROJECT MANAGER

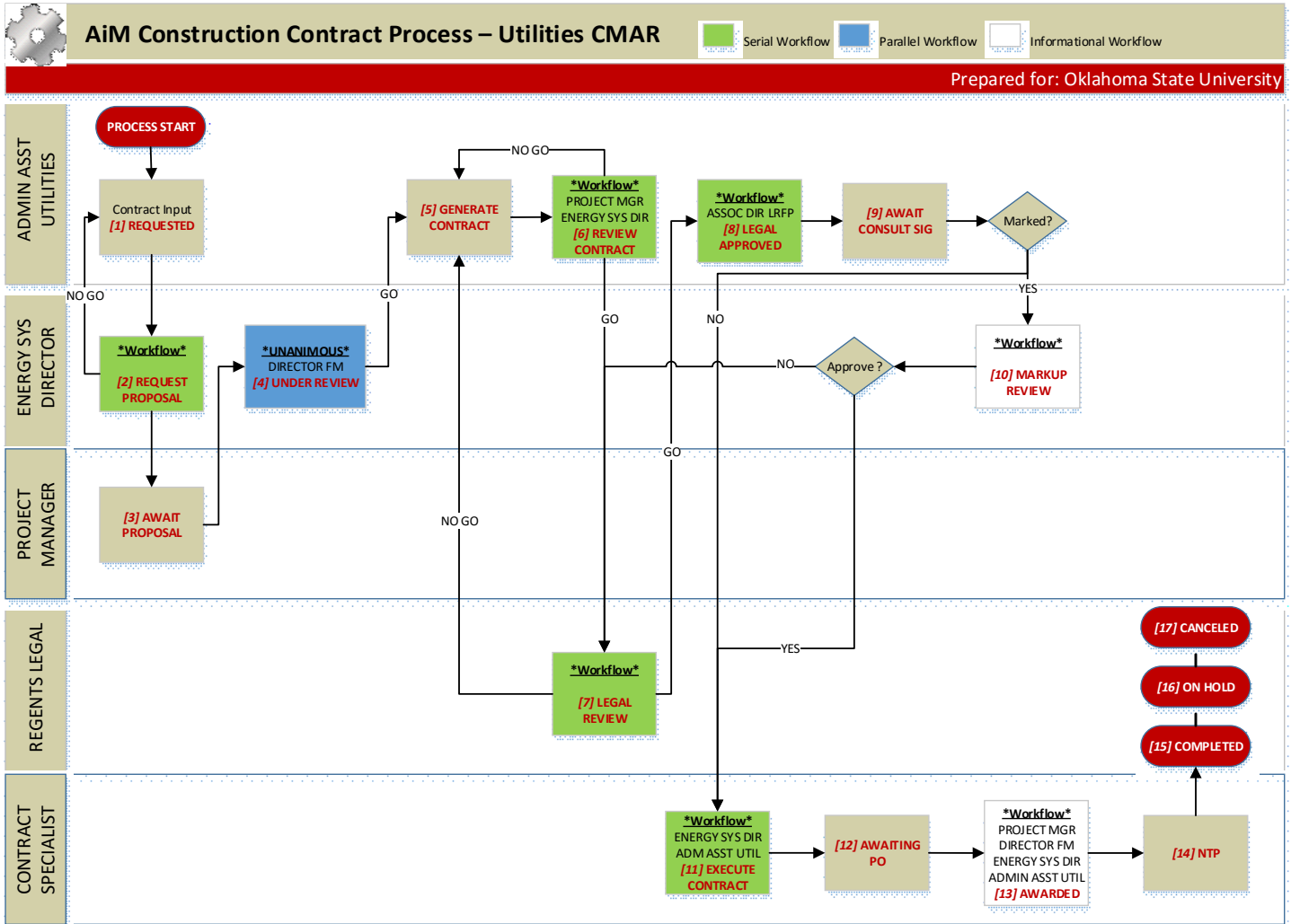
1. Responds to questions and comments from OKCorral approvers,
2. Provides additional documentation/clarification when needed.

3. ADVERTISE – *Workflow: Serial; Go Status: **BID OPENING**; No Go Status: N/A*

1. CONTRACT SPECIALIST

1. Receives Bids
2. Responds to workflow
4. BID OPENING- (*Personal Query*)
 1. **PROJECT MANAGER**
 1. Logs bids in related document
 2. Generate letter to unsuccessful bidders
 3. Enter Low Bid Contractor into Notes Log
 4. Change Status to **UNDER REVIEW**
5. UNDER REVIEW – *Workflow: Parallel – Unanimous; Go Status: **AWAITING PO**; No Go Status: **READY TO ADVERTISE***
 1. **PROJECT MANAGER**
 1. If no go response, add note
 2. **CONTRACT SPECIALIST**
 1. Reviews Notes Log
 2. Enter Award Amount for each contract Line Item
 3. Setup Contract Accounts in AiM (View Select: Account Setup)
 1. Enter Offset Account
 4. If no go response, add note
6. AWAITING PO- (*Personal Query*)
 1. **CONTRACT SPECIALIST**
 1. Monitor personal query until PO has been issued
 2. Once PO is issued
 1. Enter PO Number in AiM Contract Reference Number
 2. Update Contract Start Date (End date optional)
 3. Enter/Update Contractor in AiM (Change from BID To awarded contractor)
 4. Enter Award Amount onto the Line Item
 5. Enter Contract Encumbered in Account Setup in Funding Source and Account
 - a. Add offset account in View Select
 6. Enter data into SciQuest (OKCorral), to push the PO
 7. Change status to **AWARDED**
7. AWARDED - (*Personal Query*)
 1. **PROJECT MANAGER**
 1. Notify CONTRACTOR to confirm receipt of the executed purchase order
 2. Plan pre-construction conference
 3. Change status to **NTP**
8. NTP – *Workflow: Informational Only*
 1. **PROJECT MANAGER**
 1. Conduct pre-construction conference
 2. Issue NTP
 2. **CONTRACT SPECIALIST**
 1. After final payment, change status to **COMPLETED**
9. COMPLETED
10. ON HOLD
11. CANCELED

Construction Contract Approval Process – Utilities CMAR



UTILITIES CMAR CONSTRUCTION CONTRACT PROCESS DOCUMENTATION

1. REQUESTED

1. ADMIN ASST UTILITIES

1. Check to see if Contractor is in AiM, if not enter Contractor, Contacts, etc.

2. Enter

1. Contract Number (auto-assigned)
2. Description
3. Type = CMAR UTILITY
4. Capital Project
5. Status will default to REQUESTED
6. Contractor and Address Code
7. Requested Date
8. Line Item(s)
 - a. Description
 - b. Line Group
 - c. Component Group/Component
 - d. Leave Award Amount blank

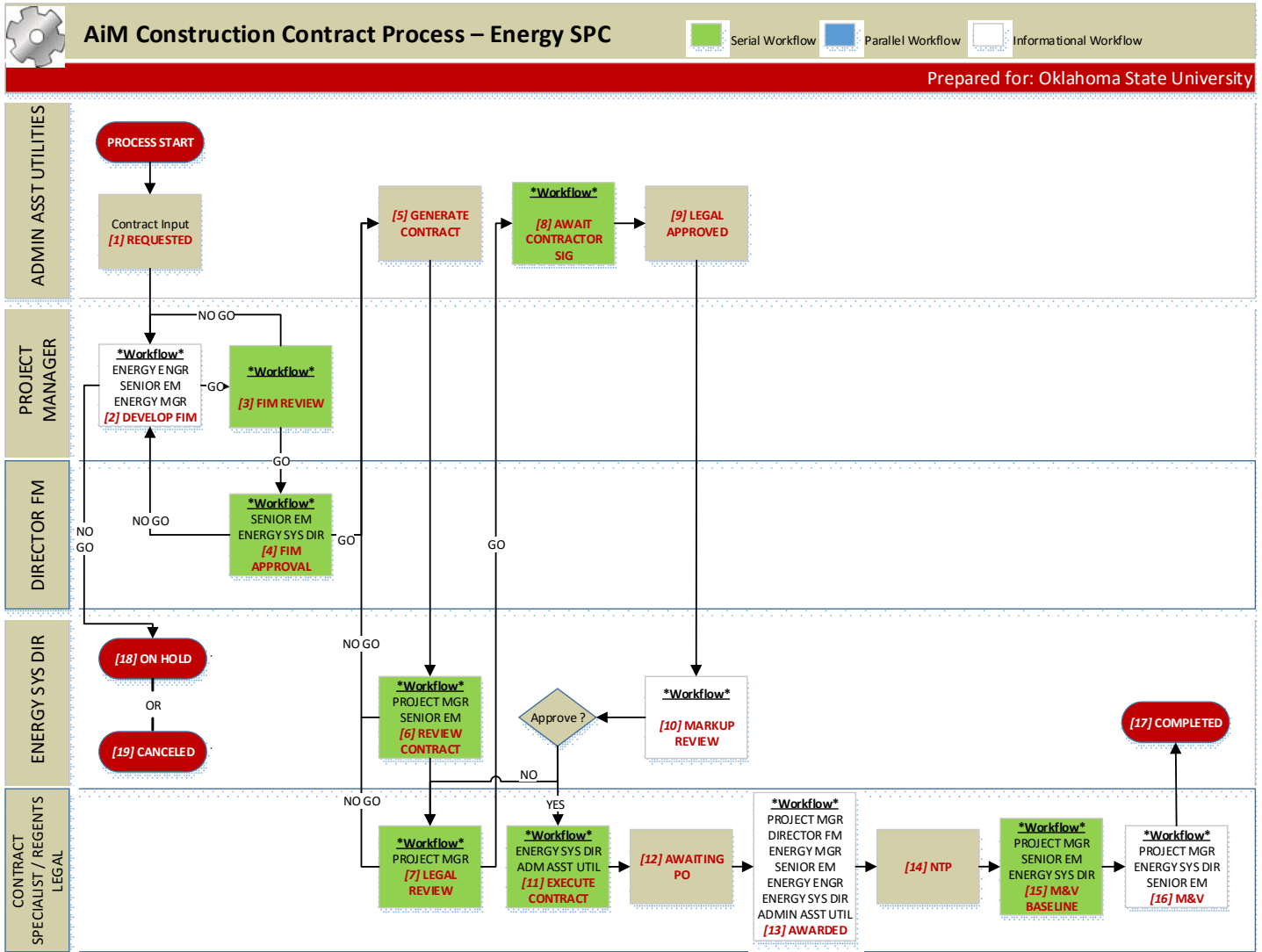
3. Change Status to **REQUEST PROPOSAL**
2. REQUEST PROPOSAL – *Workflow: Serial; Go Status: **AWAIT PROPOSAL**; No Go Status: **REQUESTED***
 1. **ENERGY SYS DIRECTOR**
 1. Review Component Groups/Component(s)
 2. Request Proposal from CMAR
 3. Attach document/email to Contract record in AiM
 4. Respond to Workflow
3. AWAIT PROPOSAL
 1. **PROJECT MANAGER**
 1. When Proposal received, attach to contract in AiM
 2. DO NOT enter amount(s) at this time.
 3. Change Status to **UNDER REVIEW**
4. UNDER REVIEW – *Workflow: Parallel – Unanimous; Go Status: **GENERATE CONTRACT**; No Go Status: **REQUEST PROPOSAL***
 1. **ENERGY SYS DIRECTOR**
 1. If no go response, add note
 2. **DIRECTOR FM**
 1. If no go response, add note
 2. Respond Workflow
5. GENERATE CONTRACT
 1. **ADMIN ASST UTILITIES**
 1. Update award amounts on contract in AiM
 2. Generate Contract documents and attach as related document
 3. Change status to **REVIEW CONTRACT**
6. REVIEW CONTRACT – *Workflow: Serial; Go Status: **LEGAL REVIEW**; No Go Status: **GENERATE CONTRACT***
 1. **PROJECT MANAGER**
 2. **ENERGY SYS DIRECTOR**
 3. **ADMIN ASST UTILITY**
 1. Respond to Workflow
7. LEGAL REVIEW – *Workflow: Serial; Go Status: **LEGAL APPROVED**; No Go Status: **GENERATE CONTRACT***
 1. **REGENTS LEGAL**
 1. Review Contract
 2. If document is redlined, attach to Contract in AiM
8. LEGAL APPROVED - *Workflow: Serial; Go Status: **AWAITING CONSULT SIG**; No Go Status: N/A*
 1. **ENERGY SYS DIRECTOR**
 2. **ADMIN ASST UTILITIES**
 1. Send Contract to CMAR for signature
 2. Respond to Workflow
9. AWAIT CONTRACTOR SIG
 1. **ADMIN ASST UTILITIES**
 1. When signed Contract received, attach as related document
 1. If marked up, change status to **MARKUP REVIEW**
 2. If not marked up, Change status to **EXECUTE CONTRACT**
10. MARKUP REVIEW – *Workflow: Informational Only*
 1. **ENERGY SYS DIRECTOR**
 1. Review comments
 2. Change status:
 1. **LEGAL REVIEW**
 2. **EXECUTE CONTRACT**
11. EXECUTE CONTRACT – *Workflow: Serial; Go Status: **AWAITING PO**; No Go Status: N/A*



AiM™ CPPM Standard Operation Procedures

1. **ENERGY SYS DIRECTOR**
 1. Sign contract
2. **ADMIN ASST UTILITIES**
 1. Attach copy of executed contract in AiM
 2. Send hard copy of signed contract to REGENTS LEGAL
 3. Send hard copy of signed contract to CMAR
3. **CONTRACT SPECIALIST**
 1. Enter Award Amount for each contract Line Item
 2. Setup Contract Accounts in AiM
 1. Enter Offset Account
 3. Enter data into SciQuest (OKCorral), beginning an external process to AiM
 1. Attach board approval to the requisition in SciQuest
 4. Change status to **AWAITING PO**
12. AWAITING PO
 1. **CONTRACT SPECIALIST**
 1. Monitor personal query until PO has been issued
 2. Once PO is issued
 1. Enter PO Number in AiM Contract Reference Number
 2. Update Contract Start Date (End date optional)
 3. Change status to **AWARDED**
13. AWARDED – *Workflow: Informational Only*
 1. **PROJECT MANAGER**
 2. **DIRECTOR FM**
 3. **ENERGY SYS DIRECTOR**
 4. **ADMIN ASST UTILITIES**
 5. **CONTRACT SPECIALIST**
 1. Notify CMAR to confirm receipt of the executed purchase order
 2. Change status to **NTP**
14. NTP
 1. **CONTRACT SPECIALIST**
 1. After final payment, change status to **COMPLETED**
15. ON HOLD
16. COMPLETED
17. CANCELED

Construction Contract Approval Process – Energy SPC



ENERGY SPC CONSTRUCTION CONTRACT PROCESS DOCUMENTATION

1. REQUESTED

1. ADMIN ASST UTILITIES

1. Check to see if Contractor is in AiM, if not enter Contractor, Contacts, etc.
2. Enter
 1. Contract Number (auto-assigned)
 2. Description
 3. Type = ENERGY SPC
 4. Capital Project
 5. Status will default to REQUESTED
 6. Contractor and Address Code
 7. Requested Date
 8. Line Item(s)
 - a. Description
 - b. Line Group
 - c. Component Group/Component

- d. Leave Award Amount blank
3. Change Status to **DEVELOP FIM**
2. DEVELOP FIM – *Workflow: Informational Only*
 1. **ENERGY ENGINEER**
 2. **SENIOR EM**
 3. **ENERGY MANAGER**
 4. **PROJECT MANAGER**
 1. Request FIM from ENERGY SAVINGS CONTRACTOR
 2. Attach document/email to Contract record in AiM
 3. Developing scope with ENERGY SAVINGS CONTRACTOR and project team
 4. Attach FIM document in related document as type of SCOPE of WORK
 5. Once FIM's finalized change status to **FIM REVIEW**
 6. If not proceeding change status to **ON HOLD or CANCELLED**
3. FIM REVIEW - *Workflow: Serial; Go Status: FIM APPROVAL; No Go Status: DEVELOP FIM*
 1. **PROJECT MANAGER**
 1. Schedules Review meeting
 2. Attaches meeting minutes and attendees
 3. Adds notes, as appropriate
 4. Changes status of **CAPITAL PROJECT** to **ESTIMATING**
 5. Responds to workflow
4. FIM APPROVAL – *Workflow: Serial; Go Status: GENERATE CONTRACT; No Go Status: DEVELOP FIM*
 1. **SENIOR EM**
 1. Review notes and FIM documents
 2. If no go response, add note
 2. **ENERGY SYS DIRECTOR**
 1. Review notes and FIM documents
 2. If no go response, add note
 3. **DIRECTOR FM**
 1. Review notes and FIM documents
 2. If no go response, add note
 3. Respond Workflow
5. GENERATE CONTRACT
 1. **ADMIN ASST UTILITIES**
 1. Received copy of contract from ENERGY SAVINGS CONTRACTOR and attaches document to project
 1. Ensure 4 copies on 50% bond paper (get with Phil on specifics for printed contract)
 2. Update component amounts in AiM
 3. Changes status of **CAPITAL PROJECT** to **FUND CONSTRUCTION**
 4. Change **CONTRACT** status to **REVIEW CONTRACT**
6. REVIEW CONTRACT – *Workflow: Serial; Go Status: LEGAL REVIEW; No Go Status: GENERATE CONTRACT*
 1. **PROJECT MANAGER**
 1. Review contract documents
 2. Adds notes as appropriate
 2. **SENIOR EM**
 1. Review notes and FIM documents
 2. If no go response, add note
 3. **ENERGY SYS DIRECTOR**
 1. Review contract documents
 2. Ensures **CAPITAL PROJECT** is in status of **CONTRACT SETUP**
 3. Adds notes as appropriate



AiM™ CPPM Standard Operation Procedures

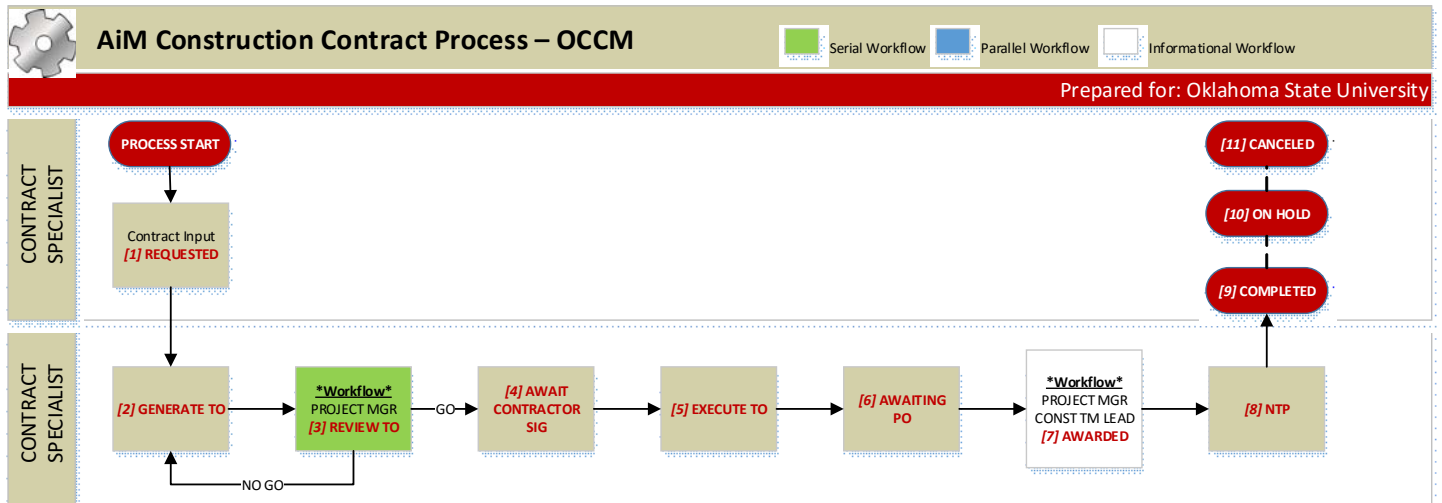
4. Respond to Workflow
7. LEGAL REVIEW – *Workflow: Serial; Go Status: **AWAIT CONTRACTOR SIG**; No Go Status: **GENERATE CONTRACT***
 1. **REGENTS LEGAL**
 1. Review Contract
 2. If document is redlined, attach to Contract in AiM
 3. Responds to workflow
8. AWAIT CONTRACTOR SIG- *Workflow: Serial; Go Status: **LEGAL APPROVED**; No Go Status: N/A*
 1. **ADMIN ASST UTILITIES**
 1. Send Contract to ENERGY SAVINGS CONTRACTOR for signature
 2. Attach signed contract as related document
 3. Respond to Workflow
9. LEGAL APPROVED
 1. **ADMIN ASST UTILITIES**
 1. When signed Contract received, attach as related document
 1. If marked up, change status to **MARKUP REVIEW**
 2. If not marked up, Change status to **EXECUTE CONTRACT**
10. MARKUP REVIEW – *Workflow: Informational Only*
 1. **ENERGY SYS DIRECTOR**
 1. Review comments
 2. Change status:
 1. **LEGAL REVIEW**
 2. **EXECUTE CONTRACT**
11. EXECUTE CONTRACT – *Workflow: Serial; Go Status: **AWAITING PO**; No Go Status: N/A*
 1. **ENERGY SYS DIRECTOR**
 1. Sign contract
 2. **ADMIN ASST UTILITIES**
 1. Attach copy of executed contract in AiM
 2. Send hard copy of signed contract to REGENTS LEGAL
 3. Send hard copy of signed contract to ENERGY SAVINGS CONTRACTOR
 3. **CONTRACT SPECIALIST**
 1. Enter Award Amount for each contract Line Item
 2. Setup Contract Accounts in AiM
 1. Enter Offset Account
 3. Enter data into SciQuest (OKCorral), beginning an external process to AiM
 1. Adds note to ensure DIRECTOR PURCHASING initials each page and signs contract.
 2. Attach board approval to the requisition in SciQuest
 4. Change status to **AWAITING PO**
12. AWAITING PO
 1. **CONTRACT SPECIALIST**
 1. Monitor personal query until PO has been issued
 2. Once PO is issued
 1. Enter PO Number in AiM Contract Reference Number
 2. Update Contract Start Date (*End date optional*)
 3. Change status to **AWARDED**
13. AWARDED – *Workflow: Informational Only*
 1. **PROJECT MANAGER**
 2. **DIRECTOR FM**
 3. **ENERGY MANAGER**
 4. **SENIOR EM**



AiM™ CPPM Standard Operation Procedures

5. **ENERGY ENGINEER**
6. **ENERGY SYS DIRECTOR**
7. **ADMIN ASST UTILITIES**
8. **CONTRACT SPECIALIST**
 1. Notify ENERGY SAVINGS CONTRACTOR to confirm receipt of the executed purchase order
 2. Change **CAPITAL PROJECT** status in workflow to **NTP**
 3. Change **CONTRACT** status to **NTP**
14. NTP
 1. **CONTRACT SPECIALIST**
 1. After Substantial Completion Payment, change status to **M&V BASELINE**
15. M&V BASELINE - *Workflow: Serial; Go Status: M&V; No Go Status: N/A*
 1. **PROJECT MANAGER**
 1. Received M&V Post Installation Report
 2. **SENIOR EM**
 1. Review M&V Post Installation Report
 3. **ENERGY SYS DIRECTOR**
 1. Review/sign M&V Post Installation Report
 4. **CONTRACT SPECIALIST**
 1. Makes Payment for M&V Post Installation Report
 2. Responds to Workflow
16. M&V - *Workflow: Informational Only*
 1. **PROJECT MANAGER**
 1. Received M&V Reports
 2. **ENERGY SYS DIRECTOR**
 1. Review/sign M&V Reports
 3. **SENIOR EM**
 1. Review M&V Post Installation Report
 4. **CONTRACT SPECIALIST**
 1. Makes Payments for M&V Invoices
 2. Change status to **COMPLETED**
17. COMPLETED
18. ON HOLD
19. CANCELED

Construction Contract Approval Process – OCCM



OCCM CONSTRUCTION CONTRACT PROCESS DOCUMENTATION

1. REQUESTED

1. CONTRACT SPECIALIST

1. Check to see if Contractor is in AiM, if not enter Contractor, Contacts, etc.

2. Enter

1. Contract Number (auto-assigned)
2. Description
3. Type = OCCM / AS NEEDED
4. Capital Project
5. Status will default to REQUESTED
6. Contractor and Address Code
7. Requested Date
8. Line Item(s)
 - a. Description
 - b. Line Group
 - c. Component Group/Component
 - d. Leave Award Amount blank

3. Change Status to **GENERATE TO**

2. GENERATE TO

1. PROJECT MANAGER

1. Provides project documents

2. CONTRACT SPECIALIST

1. Generate TO and attach as related document

2. Change status to **REVIEW TO**

3. REVIEW TO – Workflow: Serial; Go Status: **AWAIT CONTR SIG**; No Go Status: **GENERATE TO**

1. PROJECT MANAGER

2. CONTRACT SPECIALIST

1. Send TO to contractor for signature

2. Respond to Workflow

4. AWAIT CONTRACTOR SIG

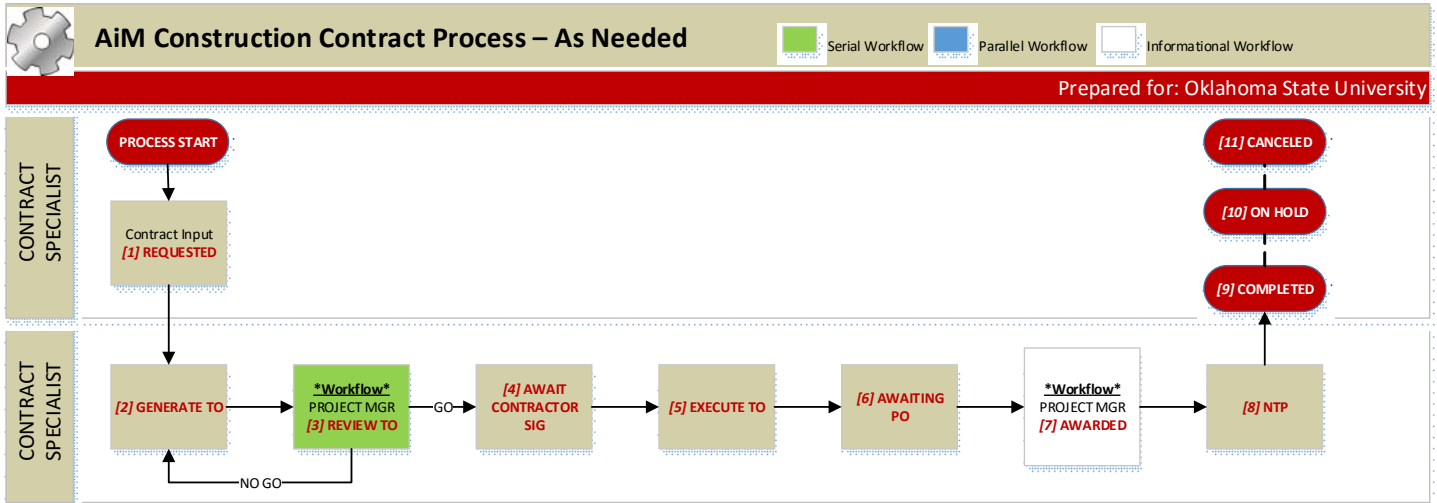
1. CONTRACT SPECIALIST



AiM™ CPPM Standard Operation Procedures

1. When signed TO received, attach as related document
 1. Change status to **EXECUTE TO**
5. EXECUTE TO
 1. **CONTRACT SPECIALIST**
 1. Enter Award Amount for each contract Line Item
 2. Setup Contract Accounts in AiM
 1. Enter Offset Account
 3. Enter data into SciQuest (OKCorral), beginning an external process to AiM
 4. Change status to **AWAITING PO**
6. AWAITING PO
 1. **CONTRACT SPECIALIST**
 1. Monitor personal query until PO has been issued
 2. Once PO is issued
 1. Enter PO Number in AiM Contract Reference Number
 2. Update Contract Start/End Date
 3. Change status to **AWARDED**
7. AWARDED – *Workflow: Informational Only*
 1. **PROJECT MANAGER**
 2. **CONST TEAM LEADER**
 3. **CONTRACT SPECIALIST**
 1. Notify Contractor to confirm receipt of the executed purchase order
 2. Change status to **NTP**
8. NTP
 1. **CONTRACT SPECIALIST**
 1. After final payment, change status to **COMPLETED**
9. COMPLETED
10. ON HOLD
11. CANCELED

Construction Contract Approval Process – As Needed



AS NEEDED CONSTRUCTION CONTRACT PROCESS DOCUMENTATION

1. REQUESTED

1. CONTRACT SPECIALIST

1. Check to see if Contractor is in AiM, if not enter Contractor, Contacts, etc.
2. Enter
 1. Contract Number (auto-assigned)
 2. Description
 3. Type = OCCM / AS NEEDED
 4. Capital Project
 5. Status will default to REQUESTED
 6. Contractor and Address Code
 7. Requested Date
 8. Line Item(s)
 - a. Description
 - b. Line Group
 - c. Component Group/Component
 - d. Leave Award Amount blank

3. Change Status to **GENERATE TO**

2. GENERATE TO

1. PROJECT MANAGER

1. Provides project documents

2. CONTRACT SPECIALIST

1. Generate TO and attach as related document
2. Change status to **REVIEW TO**

3. REVIEW TO – Workflow: Serial; Go Status: **AWAIT CONTR SIG**; No Go Status: **GENERATE TO**

1. PROJECT MANAGER

2. CONTRACT SPECIALIST

1. Send TO to contractor for signature
2. Respond to Workflow

4. AWAIT CONTRACTOR SIG

1. CONTRACT SPECIALIST



AiM™ CPPM Standard Operation Procedures

1. When signed TO received, attach as related document
 1. Change status to **EXECUTE TO**
5. EXECUTE TO
 1. **CONTRACT SPECIALIST**
 1. Enter Award Amount for each contract Line Item
 2. Setup Contract Accounts in AiM
 1. Enter Offset Account
 3. Enter data into SciQuest (OKCorral), beginning an external process to AiM
 4. Change status to **AWAITING PO**
6. AWAITING PO
 1. **CONTRACT SPECIALIST**
 1. Monitor personal query until PO has been issued
 2. Once PO is issued
 1. Enter PO Number in AiM Contract Reference Number
 2. Update Contract Start/End Date
 3. Change status to **AWARDED**
7. AWARDED – *Workflow: Informational Only*
 1. **PROJECT MANAGER**
 2. **CONTRACT SPECIALIST**
 1. Notify CMAR to confirm receipt of the executed purchase order
 2. Change status to **NTP**
8. NTP
 1. **CONTRACT SPECIALIST**
 1. After final payment, change status to **COMPLETED**
9. COMPLETED
10. ON HOLD
11. CANCELED



CAPITAL PROJECT CONSTRUCTION CONTRACT CHANGE ORDERS

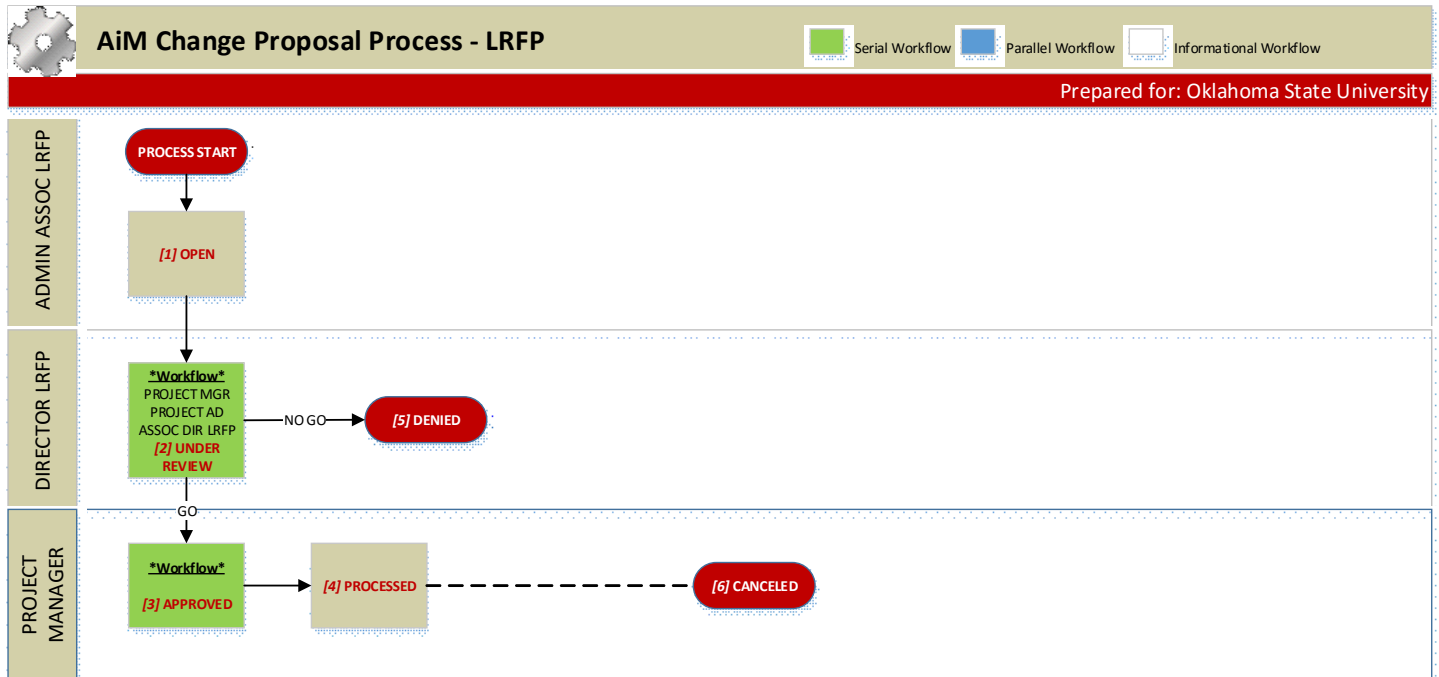
The Construction Change Order Screen processes change orders in AiM to account for additive or deductive changes in work, contract sum, and/or contract time (all at the contract line item level).

Change orders are derived in a variety of ways: loading construction change proposals and construction change directives (both of which could have originated as issues and then associated to **proposals** or **directives**), modifying existing contract line items and creating new contract line items on the fly (both of which use the green button with the plus sign).

The Construction Contract Change Order Description field provides a way to describe the change order transaction. A detailed explanation can be entered into the extra description view and documentation can be attached via the related documents view.

The line item portion of the Construction Change Order Screen provides four options for creating change order line items: loading existing construction change directives, loading existing construction change proposals and either creating new line items or modifying existing ones. All line items must be associated to a capital project component to save the record.

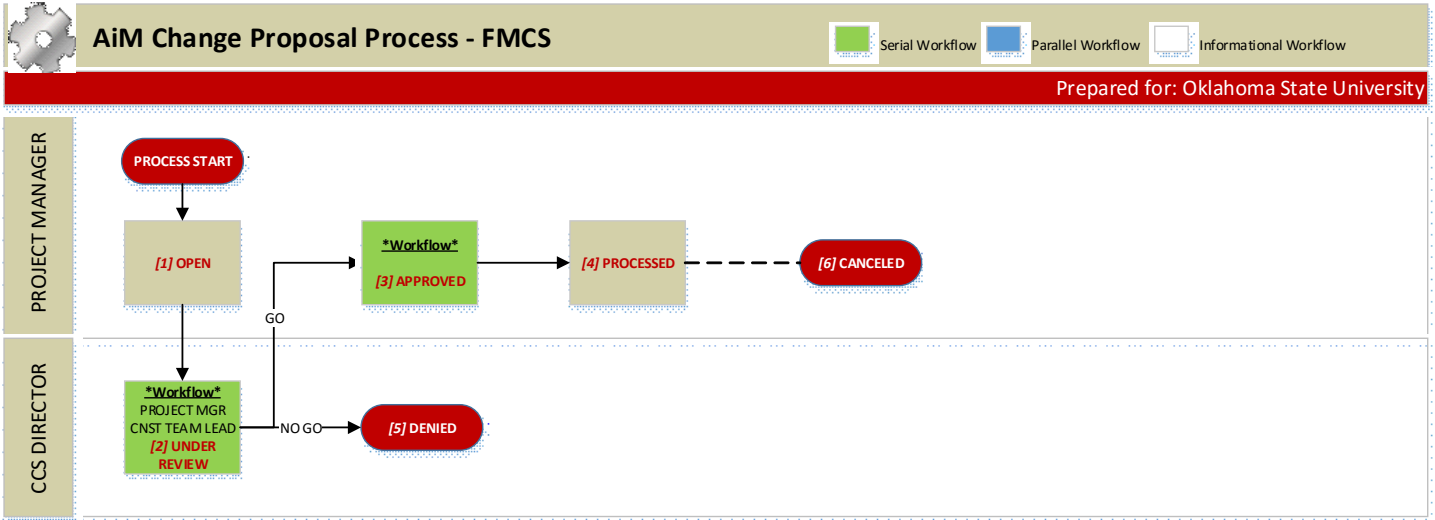
Construction Contract Change Proposal Process - LRF



LRFP CHANGE PROPOSAL PROCESS DOCUMENTATION

1. OPEN
 1. **ADMIN ASSOC LRF**
 1. Enter Change Proposal
 2. Select appropriate Reason (Contractor Req, Unforeseen Condition, Client Req, etc.)
 3. Attach Change Proposal document and any other appropriate correspondence
 4. Choose line item to tie to the contract line item
 5. Link appropriate Change Directives
 6. Change Status **UNDER REVIEW**
 2. UNDER REVIEW (Finalized flag)– *Workflow: Serial; Go Status: **APPROVED**, No Go Status: **DENIED***
 1. **PROJECT MANAGER**
 1. Meet with Client on scope and cost
 2. **PROJECT AD**
 1. Review Change Proposal
 3. **ASSOC DIR LRF**
 1. Review Change Proposal
 4. **DIRECTOR LRF**
 1. Review Change Proposal
 2. Respond to Workflow
 3. APPROVED – *Workflow: Serial; Go Status: **PROCESSED**, No Go Status: N/A*
 1. **PROJECT MANAGER**
 1. Initiate Budget Revision Process if needed
 4. PROCESSED (Included on a Change Order)
 5. DENIED (Processed flag)
 6. CANCELED

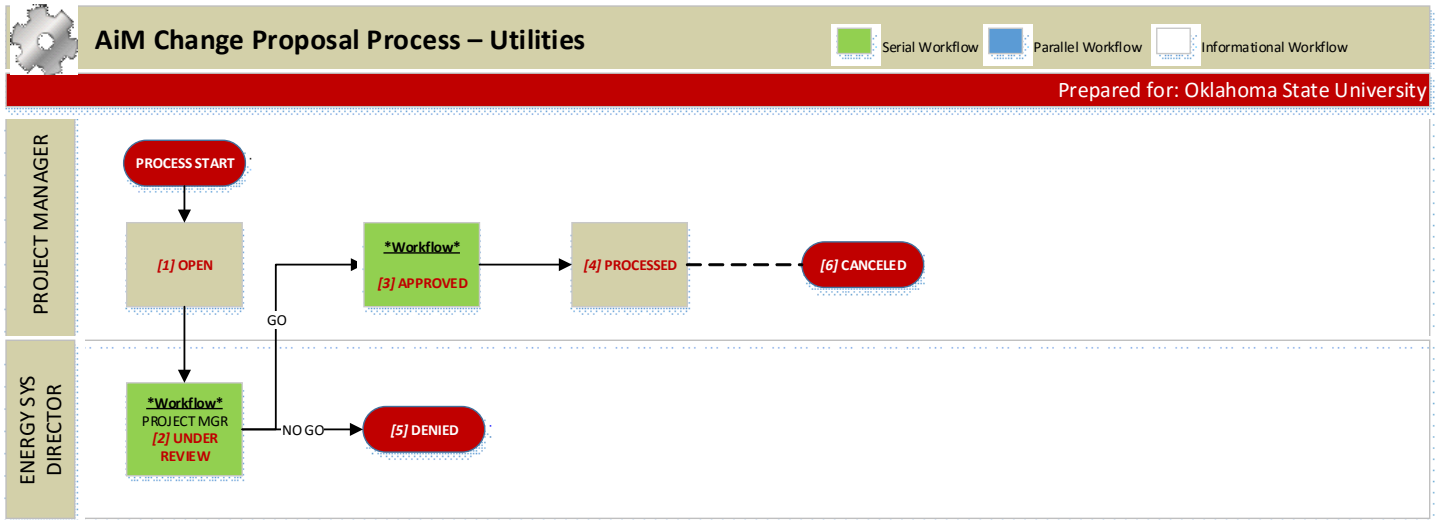
Construction Contract Change Proposal Process - FMCS



FMCS CHANGE PROPOSAL PROCESS DOCUMENTATION

1. OPEN
 1. **PROJECT MANAGER**
 1. Enter Change Proposal
 2. Select appropriate Reason (Contractor Req, Unforeseen Condition, Client Req, etc.)
 3. Attach Change Proposal document
 4. Choose line item to tie to the contract line item
 5. Link Issue if appropriate
 6. Change Status **UNDER REVIEW**
 2. **UNDER REVIEW** (Finalized flag)– *Workflow: Serial; Go Status: **APPROVED**; No Go Status: **DENIED***
 1. **PROJECT MANAGER**
 1. Meet with Client on scope and cost
 2. **CONST TEAM LEADER**
 1. Review Change Proposal
 3. **CCS DIRECTOR**
 1. Review Change Proposal
 3. **APPROVED** – *Workflow: Serial; Go Status: **PROCESSED**, No Go Status: N/A*
 1. **PROJECT MANAGER**
 1. Initiate Budget Revision Process if needed
 4. **PROCESSED** (Included on a Change Order)
 5. **DENIED** (Processed flag)
 6. **CANCELED**

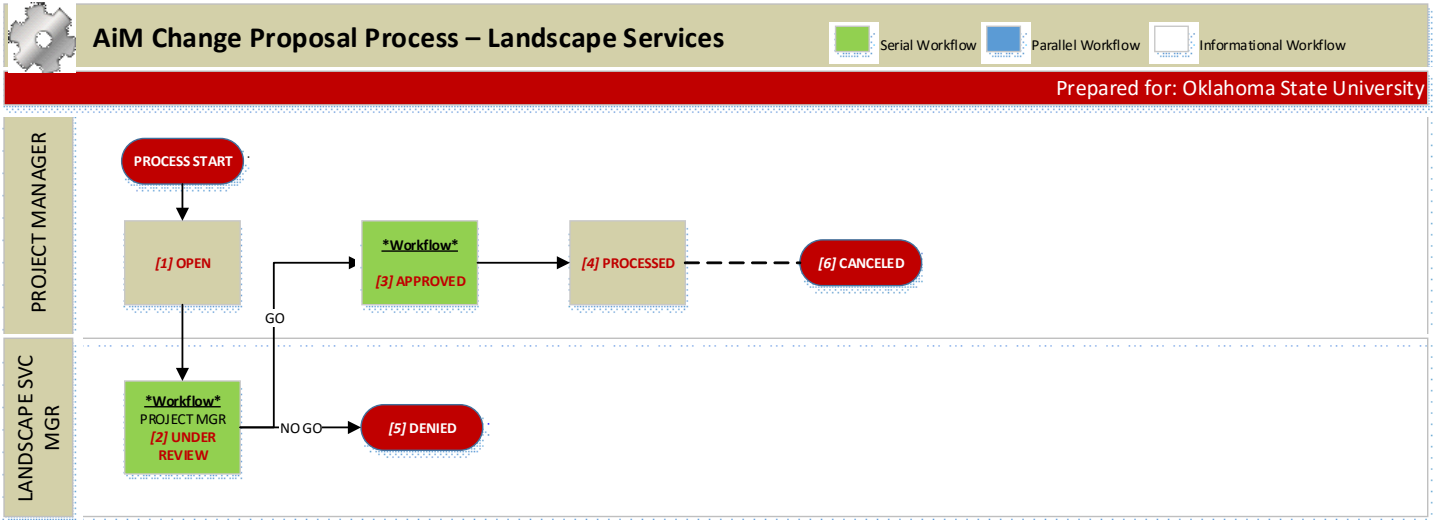
Construction Contract Change Proposal Process – Utilities



UTILITIES CHANGE PROPOSAL PROCESS DOCUMENTATION

1. OPEN
 1. **PROJECT MANAGER**
 1. Enter Change Proposal
 2. Select appropriate Reason (Contractor Req, Unforeseen Condition, Client Req, etc.)
 3. Attach Change Proposal document
 4. Choose line item to tie to the contract line item
 5. Link Issue if appropriate
 6. Change Status **UNDER REVIEW**
2. UNDER REVIEW (Finalized flag)– Workflow: Serial; Go Status: **APPROVED**, No Go Status: **DENIED**
 1. **PROJECT MANAGER**
 1. Meet with Client on scope and cost
 2. **ENERGY SYS DIRECTOR**
 1. Review Change Proposal
3. APPROVED – Workflow: Serial; Go Status: **PROCESSED**, No Go Status: N/A
 1. **PROJECT MANAGER**
 1. Initiate Budget Revision Process if needed
4. PROCESSED (Included on a Change Order)
5. DENIED (Processed flag)
6. CANCELED

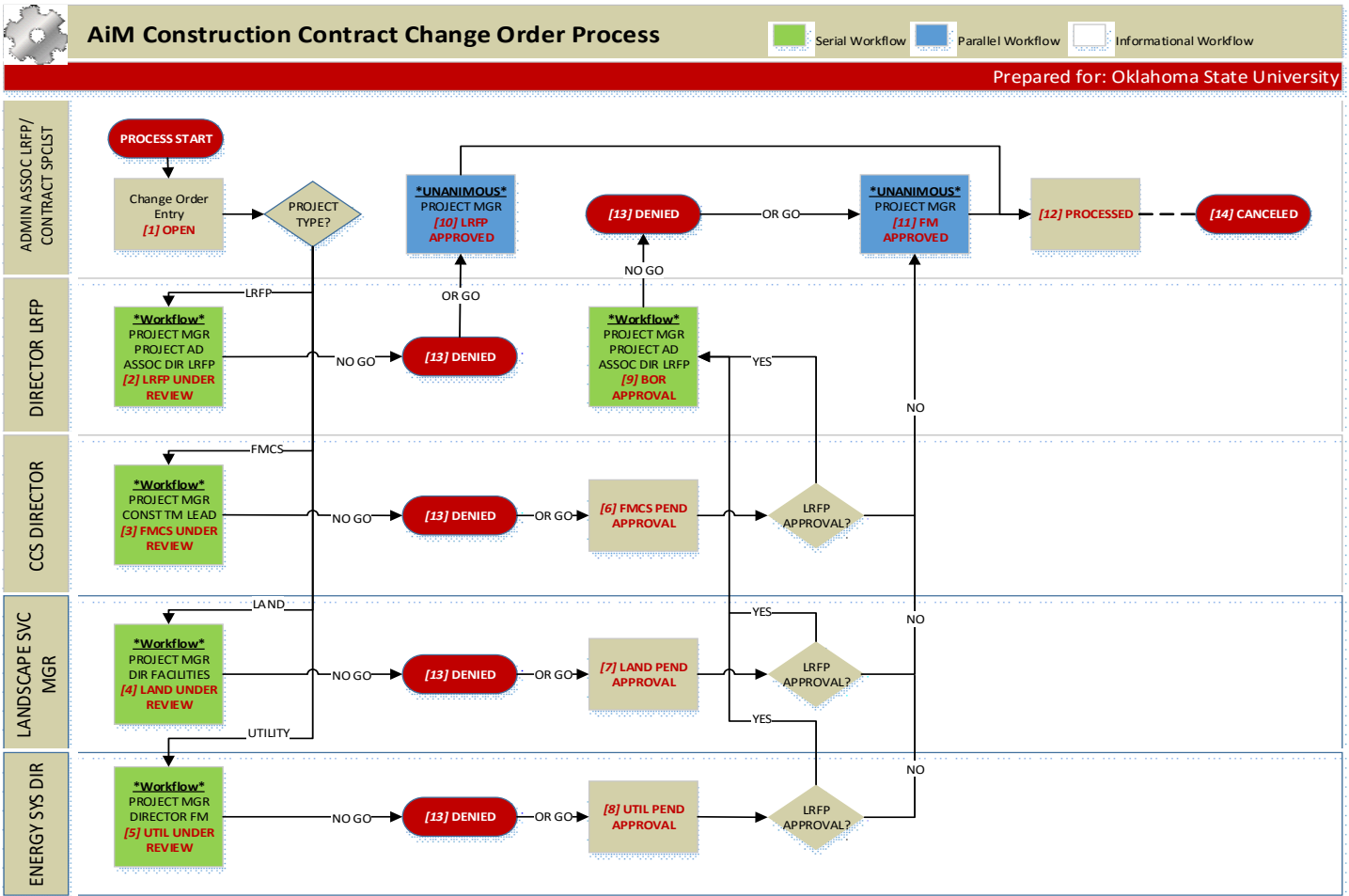
Construction Contract Change Proposal Process – Landscape Services



LANDSCAPE SERVICES CHANGE PROPOSAL PROCESS DOCUMENTATION

1. OPEN
 1. **PROJECT MANAGER**
 1. Enter Change Proposal
 2. Select appropriate Reason (Contractor Req, Unforeseen Condition, Client Req, etc.)
 3. Attach Change Proposal document
 4. Choose line item to tie to the contract line item
 5. Link Issue if appropriate
 6. Change Status **UNDER REVIEW**
 2. UNDER REVIEW (Finalized flag)– Workflow: Serial; Go Status: **APPROVED**, No Go Status: **DENIED**
 1. **PROJECT MANAGER**
 1. Meet with Client on scope and cost
 2. **LANDSCAPE SVC MGR**
 1. Review Change Proposal
 3. APPROVED – Workflow: Serial; Go Status: **PROCESSED**, No Go Status: N/A
 1. **PROJECT MANAGER**
 1. Initiate Budget Revision Process if needed
 4. PROCESSED (Included on a Change Order)
 5. DENIED (Processed flag)
 6. CANCELED

Construction Contract Change Order Process



CHANGE ORDER PROCESS DOCUMENTATION

1. OPEN
 1. **ADMIN ASSOC LRFP/CONTRACT SPECIALIST**
 1. Enter Change Order
 2. Select appropriate Reason (Addl Svcs, Design Change, etc.)
 3. Attach Change Order document and any other appropriate correspondence
 4. Load appropriate Change Order Proposals/Directives
 5. If ADMIN ASSOC LRFP, Change status to **LRFP UNDER REVIEW**
 6. If CONTRACT SPECIALIST
 1. If FMCS Project, Change status to **FMCS UNDER REVIEW**
 2. If Landscape Project, Change status to **LAND UNDER REVIEW**
 3. If Utilities Project, Change status to **UTIL UNDER REVIEW**
 2. **LRFP UNDER REVIEW – Workflow: Serial; Go Status: LRFP APPROVED, No Go Status: DENIED**
 1. **PROJECT MANAGER**
 1. Meet with Client on scope and cost
 2. **PROJECT AD**
 1. Review Change Proposal
 3. **ASSOC DIR LRFP**
 1. Review Change Proposal
 4. **DIRECTOR LRFP**



AiM™ CPPM Standard Operation Procedures

1. Review Change Proposal
3. FMCS UNDER REVIEW – *Workflow: Serial; Go Status: **FMCS PEND APPROVAL**, No Go Status: **DENIED***
 1. **PROJECT MANAGER**
 1. Meet with Client on scope and cost
 2. **CONST TEAM LEADER**
 1. Review Change Proposal
 3. **CCS DIRECTOR**
 1. Review Change Proposal
4. LAND UNDER REVIEW – *Workflow: Serial; Go Status: **LAND PEND APPROVAL**, No Go Status: **DENIED***
 1. **PROJECT MANAGER**
 1. Meet with Client on scope and cost
 2. **LANDSCAPE SVC MGR**
 1. Review Amendment
 3. **DIRECTOR FACILITIES**
 1. Review Amendment
5. UTIL UNDER REVIEW – *Workflow: Serial; Go Status: **UTIL PEND APPROVAL**, No Go Status: **DENIED***
 1. **PROJECT MANAGER**
 1. Meet with Client on scope and cost
 2. **ENERGY SYS DIRECTOR**
 1. Review Amendment
 3. **DIRECTOR FM**
 1. Review Amendment
6. FMCS PEND APPROVAL (*Personal Query*)
 1. **CCS DIRECTOR**
 1. If Dir LRFP approval required, change status to **BOR APPROVAL**
 2. If Dir LRFP approval not required, change status to **FM APPROVED**
7. LAND PEND APPROVAL (*Personal Query*)
 1. **LANDSCAPE SVC MGR**
 1. If Dir LRFP approval required, change status to **BOR APPROVAL**
 2. If Dir LRFP approval not required, change status to **FM APPROVED**
8. UTIL PEND APPROVAL (*Personal Query*)
 1. **ENERGY SYS DIRECTOR**
 1. If Dir LRFP approval required, change status to **BOR APPROVAL**
 2. If Dir LRFP approval not required, change status to **FM APPROVED**
9. BOR APPROVAL – *Workflow: Serial; Go Status: **FM APPROVED**, No Go Status: **DENIED***
 1. **DIRECTOR LRFP**
 1. Review Change Order
 2. Respond to Workflow
10. LRFP APPROVED – *Workflow: Parallel-Unanimous; Go Status: **PROCESSED**, No Go Status: N/A*
 1. **PROJECT MANAGER**
 1. Initiate Budget Revision Process if needed
 2. **ADMIN ASSOC LRFP**
 1. Print Change Order report from AiM
 2. Enter change in SciQuest and attach AiM report
11. FM APPROVED – *Workflow: Parallel-Unanimous; Go Status: **PROCESSED**, No Go Status: N/A*
 1. **PROJECT MANAGER**
 1. Initiate Budget Revision Process if needed
 2. **CONTRACT SPECIALIST**
 1. Print CONSTRUCTION AMENDMENT report from AiM
 1. In Change Order, select the print icon. Select **1019-AMENDMENT** as the printout to enter into SciQuest
 - a. DO NOT SELECT 716-CHANGE ORDER. This is not approved for processing
 2. Attach the printed AMENDMENT report pdf as a related document



AiM™ CPPM Standard Operation Procedures

3. Enter change in SciQuest and attach AiM report
12. PROCESSED
13. DENIED
14. CANCELED

REQUEST FOR INFORMATION

The Request For Information (RFI) Screen acts as a partnering tool to resolve gaps in understanding construction documents. This can take place during the bidding process to get clarification on drawings, resolve conflicts, or define ambiguities or early in the construction process to eliminate the need for costly corrective measures.

RFIs can be copied to create a child record and maintain the chain of dialogue should multiple RFIs be required to resolve the issue.

The responder and response blocks appear when the RFI is saved with the submitted status flag.

The Request for Information Screen now enables the capture of both the contractor and organization responses to the RFI record. Inserting a record initiates a search screen to locate the contract requesting additional information and then inserting the appropriate capital project or both the capital project and capital program for display.

Request for Information Approval Process

AiM Request for Information Process

PROJECT MANAGER

[1] OPEN

[2] SUBMITTED

RFI PROCESS DOCUMENTATION

1. OPEN
 1. **PROJECT MANAGER**
 1. Enter RFI description, date, and required fields.
 2. Attach associated documents
 3. Change status to **OPEN**
2. SUBMITTED
 1. **PROJECT MANAGER**
 1. Review the RFI
 2. Attach related documents
 3. Add notes, as needed
 4. Change status to **CLOSED**
3. CLOSED
4. CANCELLED

ARCHITECTS SUPPLEMENTAL INSTRUCTIONS

Architect's Supplemental Instructions (ASIs) are issued for any additional work or clarifications not included in the contract documents that will not increase the contract amount or extend the contract end date. These transactions are logged to create an auditable record that these instructions have been provided.

ASIs can be copied to create child records and maintain the chain of dialogue should multiple ASIs be required to resolve the issue.

Inserting a record initiates a search screen to locate the contract requesting additional information and then inserting the appropriate capital project or both the capital project and capital program for display.

There is not a definable flowchart for ASIs, as the status codes are "created" and "closed."

1. PROJECT MANAGER

1. Add ASI log, e-mails, documents etc. as related document

PUNCH LIST

The Punch List Screen enables the user to develop a list of items within a capital project, prepared by the owner or his representative, and confirmed by the contractor, which remain to be completed in accordance with the requirements of the contract for construction at the time of substantial completion.

Punch list line items provide a systematic way of managing items earmarked for completion and associating them to capital project components, locations and/or assets.

There is not a definable flowchart for Punch Lists, as the status codes are "created" and "closed."

1. PROJECT MANAGER

1. Add punchlist, e-mails, documents etc. as related document

COMMISSIONING PLAN

Commissioning plans are well-planned and managed approaches to the installation, start-up, turnover, and verification of facilities, systems, and equipment to the end user. This results in a safe, productive environment that meets the designer's intent and the owner's quality expectations. The Commissioning Plan Screen enables the user to meet these goals by establishing line items for verifying, documenting, and training personnel to ensure increased operational efficiency.

Commissioning plan line items provide a systematic way of implementing tests or other verification methods and associating them to capital project components, locations and/or assets.

There is not a definable flowchart for Commissioning Plans, as the status codes are "created" and "closed."

1. PROJECT MANAGER

1. Add Commissioning Plan, e-mails, documents etc. as related document

SUBMITTALS

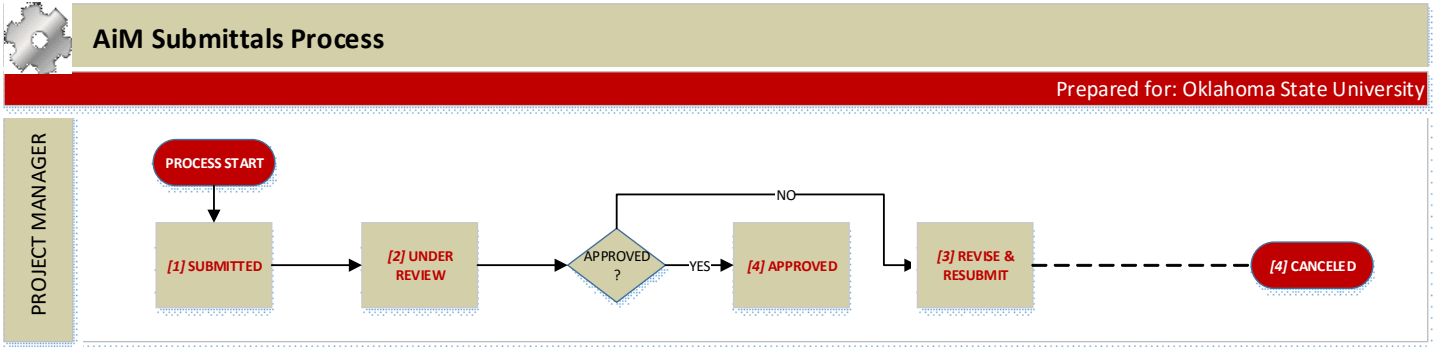
Submittals are samples, manufacturer's data, shop drawings, or other such items submitted to the owner or the design professional by the contractor for the purpose of approval or other action, usually a requirement of the contract documents.

The submittal screen enables users to track items submitted at the capital project component level and in some cases return the items submitted.

The related document obviously is very important in this case enabling the attachment of many of the items typically supplied in electronic format as submittals.

Workflow can be utilized on submittals to ensure the right person receives the submittal.

Submittals Approval Process



SUBMITTALS PROCESS DOCUMENTATION

1. SUBMITTED

1. **PROJECT MANAGER**

1. Enter Submittal description, date received, and required fields.
2. Attach associated documents
3. Add Notes, as needed
4. Change status to **UNDER REVIEW**

2. UNDER REVIEW

1. **PROJECT MANAGER**

1. Review submittals
2. Add Notes, as needed
3. If Approved (Without exception or as noted), Change status to **APPROVED**
4. If not Approved, Change status to **REVISE AND RESUBMIT**

3. REVISE AND RESUBMIT

1. **PROJECT MANAGER**

1. Inform submitter of rejection and need to resubmit
2. Attach associated documents
3. Add note with reason
4. Give date when sent back to contractor
5. Once received, change status to **UNDER REVIEW**

4. APPROVED

5. CANCELLED

SUBMITTAL TYPES:

1. 01 GENERAL REQ
2. 03 CONCRETE
3. 04 MASONRY
4. 05 METALS
5. 06 WD/PLAS/COMP
6. 07 THERM/MOIST
7. 08 OPENINGS
8. 09 FINISHES
9. 10 SPECIALTIES
10. 11 EQUIPEMENT
11. 13 SPECIAL CONS
12. 14 CONVEYING



AiM™ CPPM Standard Operation Procedures

- 13. 21 FIRE SUP
- 14. 22 PLUMBING
- 15. 23 HVAC
- 16. 26 ELECTRICAL
- 17. 31 EARTHWORK
- 18. 32 EXT IMPROV
- 19. 33 UTILITIES
- 20. 40 PROC INTEG



ACCOUNTS PAYABLE BUSINESS PROCESS FRAMEWORK

The Business Process Framework utilized by Oklahoma State University for a CPPM Module based contract is based on the functionality of Consultant Contract Invoices and Construction Contract Payment Applications.

CONSULTANT CONTRACT INVOICE

The Consultant Invoice Screen enables the user to process Consultant Contract Invoices to be applied as expenses against the Consultant Contract and Capital Project. Consultant Contract Invoices can only be processed if the Consultant Contract is in an awarded status.

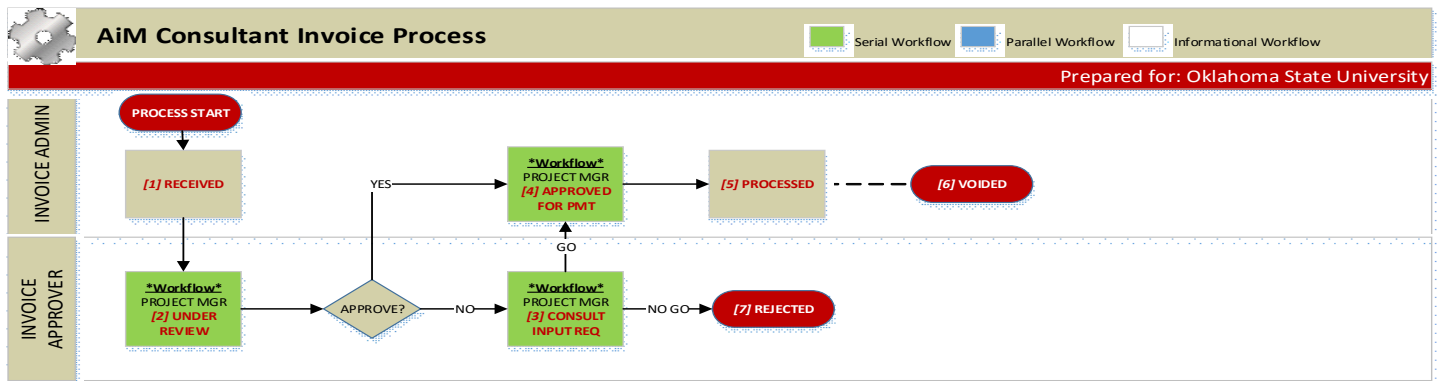
Consultant Contract Invoices are processed against Consultant Contract Line Item detail records, each of which is required to be associated to a Capital Project Component.

The Consultant Invoice Line Item Screen enables the user to add as many invoice line items as are necessary to process the overall Consultant Contract Invoice. Additional line items are added by clicking on the Load Contract Line Items hyperlink. The selection of contract line items will produce another screen, which enables the user to enter the consultant invoice line item amount.

CONSULTANT CONTRACT EXPENSE ALLOCATION

The Consultant Contract Expense Allocation View enables the user to enter the amount to be expensed for the Account(s) and Sub code combinations and the Funding Source(s) associated to the Capital Project at the Consultant Contract Invoice total level. Consultant Contract Expense allocations can optionally be applied at the Consultant Contract Line Item Detail level. The total allocation of the line items plus the total allocation at the invoice header level must equal the total accepted amount of the invoice.

Consultant Contract Invoice Approval Process



CONSULTANT INVOICE PROCESS DOCUMENTATION

1. RECEIVED
 1. **PROJECT MANAGER/CONTRACT SPECIALIST/INVOICE ADMIN/ADMIN ASST LRFP, etc.**
 1. Receive Invoice
 2. Delivers invoice to Invoice Admin
 2. **INVOICE ADMIN**
 1. Enter data into AiM
 1. Load the Contract Line Item
 2. Enter invoice amount onto appropriate Line Item
 2. Attach hard copy of invoice in AiM through related documents
 3. Change status to **UNDER REVIEW**
2. UNDER REVIEW – *Workflow: Serial; Go Status: **APPROVED FOR PMT**; No Go Status: **CONSULT INPUT REQ***
 1. **PROJECT MANAGER**
 1. Review the Invoice
 2. Add notes, as needed
 2. **INVOICE APPROVER**
 1. Review the Invoice
 2. Add Notes, as needed
 3. Respond to Workflow
3. CONSULT INPUT REQ - *Workflow: Serial; Go Status: **APPROVED FOR PMT**; No Go Status: **REJECTED***
 1. **PROJECT MANAGER**
 1. Gather information for further clarity
 2. Add notes, as needed
 2. **INVOICE APPROVER**
 1. Review the Invoice
 2. Add additional notes if REJECTED
 3. Respond to Workflow
4. APPROVED FOR PMT – *Workflow: Serial; Go Status: **PROCESSED**, No Go Status: N/A*
 1. **INVOICE ADMIN**
 1. Enter the Invoice into OK Corral
 2. **Replace** the Reference Number in AiM Invoice Information Block (this was the PO number) with the new OK Corral Invoice Number
 3. In Expense Allocation in View Select, Add the account and enter the expensed amount
 1. Enter subcode
 4. Respond to Workflow



AiM™ CPPM Standard Operation Procedures

5. PROCESSED

1. **INVOICE ADMIN**

1. If invoice cannot be paid in OK Corral, change status to **VOIDED**

6. VOIDED

7. REJECTED



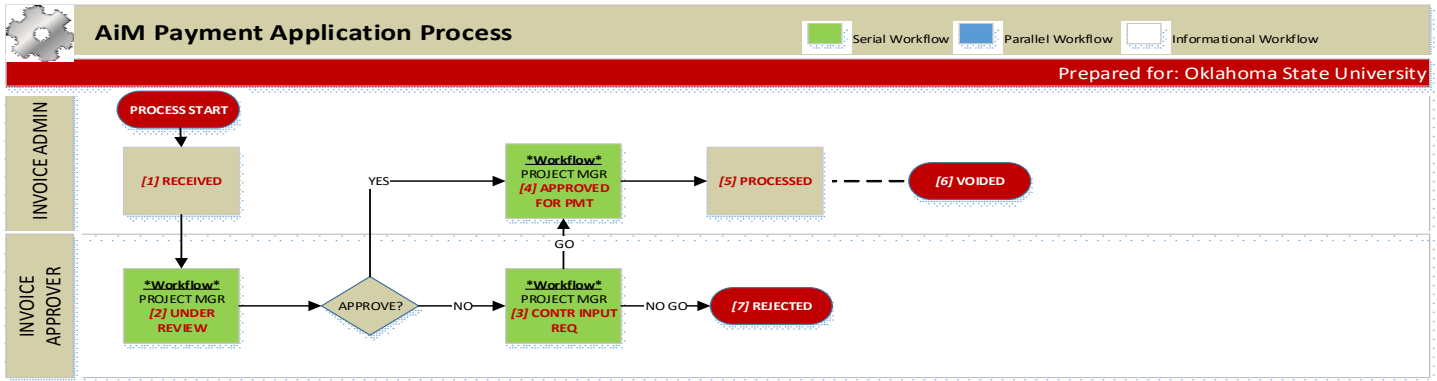
CONSTRUCTION CONTRACT PAYMENT APPLICATION

The Construction Contract Payment Application Screen enables the user to process Consultant Contract Payment Applications to be applied as expenses against the Construction Contract and Capital Project. Construction Contract Payment Applications can only be processed if the Construction Contract is in a Notice to Proceed status.

CONSTRUCTION CONTRACT EXPENSE ALLOCATION

The Construction Contract Expense Allocation View enables the user to enter the amount to be expensed for the Account(s) and Sub code combinations and the funding source(s) associated to the Capital Project at the Construction Contract Payment Application total level. Construction Contract Expense allocations can optionally be applied at the Construction Contract Payment Application Line Item Detail level also. The total allocation of the line items plus the total allocation at the invoice header level must equal the total accepted amount of the invoice.

Construction Contract Payment Application Approval Process



PAYMENT APPLICATION PROCESS DOCUMENTATION

1. RECEIVED
 1. **PROJECT MANAGER/CONTRACT SPECIALIST/INVOICE ADMIN/ADMIN ASST LRFP, etc.**
 1. Receive Payment Application
 2. Delivers Payment Application to Invoice Admin
 2. **INVOICE ADMIN**
 1. Enter data into AiM
 1. Load the Contract Line Item
 2. Enter invoice amount onto appropriate Line Item
 2. Attach hard copy of Payment Application in AiM through related documents
 3. Change status to **UNDER REVIEW**
2. UNDER REVIEW – *Workflow: Serial; Go Status: **APPROVED FOR PMT**; No Go Status: **CONTR INPUT REQ***
 1. **PROJECT MANAGER**
 1. Review the Payment Application
 2. Add notes, as needed
 2. **INVOICE APPROVER**
 1. Review the Payment Application
 2. Add Notes, as needed
 3. Respond to Workflow
3. CONTR INPUT REQ - *Workflow: Serial; Go Status: **APPROVED FOR PMT**; No Go Status: **REJECTED***
 1. **PROJECT MANAGER**
 1. Gather information for further clarity
 2. Add notes, as needed
 2. **INVOICE APPROVER**
 1. Review the Payment Application
 2. Add additional notes if REJECTED
 3. Respond to Workflow
4. APPROVED FOR PMT – *Workflow: Serial; Go Status: **PROCESSED**; No Go Status: N/A*
 1. **INVOICE ADMIN**
 1. Enter the Payment Application into OK Corral
 2. **Replace** the Reference Number in AiM Invoice Information Block (this was the PO number) with the new OK Corral Invoice Number
 3. In Expense Allocation in View Select, Add the account and enter the expensed amount
 4. Respond to Workflow
5. PROCESSED



AiM™ CPPM Standard Operation Procedures

1. INVOICE ADMIN

1. If invoice cannot be paid in OK Corral, change status of Payment Application to **VOIDED**

6. VOIDED

7. REJECTED



2.0 SYSTEM CONFIGURATION

SYSTEM ADMINISTRATION MODULE CONFIGURATION AND SETUP

RESPONSIBILITY

Responsibility	Description	Employee	Active
ADA SPECIALIST	ADA SPECIALIST	10003663	Y
ADMIN ASSOC LRFP	ADMIN ASSOCIATE LONG RANGE FACILITIES PLANNING	10017717	Y
ADMIN ASST EHS	ADMIN ASSISTANT ENVIRONMENT HEALTH & SAFETY	11146980	Y
ADMIN ASST FMCS	ADMIN ASSISTANT FACILITIES MANAGEMENT CONSTRUCTION SERVICES	10012176	Y
ADMIN ASST LRFP	ADMIN ASSISTANT LONG RANGE FACILITIES PLANNING	11669825	Y
ADMIN ASST UTILITIES	ADMIN ASSISTANT UTILITIES	10004110	Y
ASBESTOS MGR	ASBESTOS MANAGER	10022575	Y
ASSISTANT DIRECTOR 1	ASSISTANT DIRECTOR 1	10851707	Y
ASSISTANT DIRECTOR 2	ASSISTANT DIRECTOR 2	10051572	Y
ASSOC DIR LRFP	ASSOCIATE DIRECTOR LONG RANGE FACILITIES PLANNING	11573223	Y
ASSOC VP UA	ASSOCIATE VICE PRESIDENT UNIVERSITY ACCOUNTING	10073146	Y
ASST UNIV ARCHITECT	ASSISTANT UNIVERSITY ARCHITECT	10570833	Y
BAM DIRECTOR	BUDGET AND ASSET MANAGEMENT DIRECTOR	10069453	Y
CAMPUS SURVEYOR	CAMPUS SURVEYOR	11374197	Y
CCS DIRECTOR	CONSTRUCTION & CONTRACT SERVICES DIRECTOR	11664435	Y
CCS PLAN REVIEWER	CONSTRUCTION & CONTRACT SERVICES PLAN REVIEWER	11403907	Y
CONST TEAM LEADER	CONSTRUCTION TEAM LEADER	11195127	Y
CONTRACT SPECIALIST	CONTRACT SPECIALIST	10188241	Y
CT MEP MANAGER	CENTRAL TRADES MEP MANAGER	10049020	Y
CT STRUCTURAL MGR	CENTRAL TRADES STRUCTURAL MANAGER	10022568	Y
DIRECTOR ACCOUNTING	DIRECTOR ACCOUNTING	10049157	Y
DIRECTOR FACILITIES	DIRECTOR FACILITIES	10032695	Y
DIRECTOR FM	DIRECTOR FACILITIES MANAGEMENT	10517362	Y
DIRECTOR LRFP	DIRECTOR LONG RANGE FACILITIES PLANNING	10820856	Y
DIRECTOR PUB SAFETY	DIRECTOR PUBLIC SAFETY	10062064	Y
DISTRIBUTION SYS MGR	DISTRIBUTION SYSTEMS MANAGER	10017857	Y
EHS ALARMS	ENVIRONMENTAL HEALTH & SAFETY ALARMS		Y
EHS ASST DIRECTOR	EHS ASST DIRECTOR		Y
EHS DIRECTOR	ENVIRONMENTAL HEALTH & SAFETY DIRECTOR	11683482	Y
EHS FIRE LIFE INSP	ENVIRONMENTAL HEALTH & SAFETY FIRE AND LIFE SAFETY INSPECTOR	11614156	Y
EHS FIRE MARSHALL	ENVIRONMENTAL HEALTH & SAFETY FIRE MARSHALL	10022328	Y
EHS FIRE PROTECT	ENVIRONMENTAL HEALTH & SAFETY FIRE PROTECTION		Y
EHS MANAGER	ENVIRONMENTAL HEALTH & SAFETY MANAGER		Y
EHS PLAN REVIEWER	ENVIRONMENTAL HEALTH & SAFETY PLAN REVIEWER		Y
ELECTRICAL DIST SUP	ELECTRICAL DISTRIBUTION SUPERVISOR	10068994	Y



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ELECTRICAL ENGINEER	ELECTRICAL ENGINEER	10888743	Y
ENERGY ENGINEER	ENERGY ENGINEER	11517043	Y
ENERGY MANAGER	ENERGY MANAGER		Y
ENERGY SYS DIRECTOR	DIRECTOR ENERGY SERVICES	11579521	Y
FM ACCOUNTING	FACILITIES MANAGEMENT ACCOUNTING	10041976	Y
FSS MANAGER	FACILITIES SUPPORT SERVICES MANAGER	10041137	Y
GCA CONTACT	GCA CONTACT	10023439	Y
GEOSPL SYSTEMS MGR	GEOSPACIAL SYSTEMS MANAGER	10043424	Y
GIS TECHNICIAN	GEOGRAPHICAL INFORMATION SYSTEMS TECHNICIAN	10889959	Y
IN HOUSE CONST MGR	IN HOUSE CONSTRUCTION MANAGER	10032962	Y
INTERIOR DESIGNER	INTERIOR DESIGNER	10022753	Y
INVOICE ADMIN	INVOICE ADMINISTRATOR		Y
INVOICE APPROVER	INVOICE APPROVER		Y
IT RESPONSIBILITY	IT RESPONSIBILITY		Y
LANDSCAPE ARCH	LANDSCAPE ARCHITECT	10009058	Y
LANDSCAPE ASST MGR	LANDSCAPE SERVICES ASSISTANT MANAGER	10258996	Y
LANDSCAPE SVC MGR	LANDSCAPE SERVICES MANAGER	10043884	Y
MECHANICAL ENGINEER	MECHANICAL ENGINEER		Y
O&M DIRECTOR	O&M DIRECTOR	11633574	Y
PREVENTIVE MAINT SPC	PREVENTIVE MAINT SPECIALIST	11300309	Y
PROJECT AD	PROJECT AD		Y
PROJECT MANAGER	PROJECT MANAGER		Y
RECS SECTION SUPV	RECS SECTION SUPERVISOR	10027871	Y
REGENTS LEGAL	REGENTS LEGAL		Y
RISK AND PROPERTY	RISK AND PROPERTY MANAGEMENT	10032526	Y
SENIOR EM	SENIOR EM	10062922	Y
UA PLANT FUNDS	UNIVERSITY ACCOUNTING PLANT FUNDS	10027778	Y
UNIVERSITY ARCHITECT	UNIVERSITY ARCHITECT	10009013	Y
URBAN FORESTER	URBAN FORESTER	11582837	Y
UTIL PRODUCTION MGR	UTILITIES PRODUCTION MANAGER	10009108	Y
UTILITIES DIST SUPER	UTILITIES DISTRIBUTION SUPERVISOR	10038573	Y
UTILITY ENGINEER	UTILITY ENGINEER	10073147	Y



WEATHER

Weather	Description	Active
BLIZZARD	BLIZZARD	Y
DRIZZLE	DRIZZLE	Y
FOG	FOG	Y
FREEZING RAIN	FREEZING RAIN	Y
HAIL	HAIL	Y
HIGH WINDS	HIGH WINDS	Y
HURRICANE	HURRICANE	Y
ICE PELLETS	ICE PELLETS	Y
LIGHTNING	LIGHTNING	Y
PARTLY CLOUDY	PARTLY CLOUDY	Y
RAIN	RAIN	Y
SNOW	SNOW	Y
SUNNY	SUNNY	Y
TORNADO	TORNADO	Y
TROPICAL STORM	TROPICAL STORM	Y

WORKFLOW TEMPLATES

Tran	Description	Workflow Table	Active	Response Type
1001	LRFP CONCEPTUAL PLANNING INFO ONLY	ae_cp_prj_e	Y	
1002	LRFP DEVELOP FUNDING AGREEMENT PARALLEL UNANIMOUS	ae_cp_prj_e	Y	V
1003	LRFP VPAF APPROVAL INFO ONLY	ae_cp_prj_e	Y	
1004	LRFP BOR PROJ APPROVAL INFO ONLY	ae_cp_prj_e	Y	
1005	LRFP ASSIGN DESIGN ACCOUNT PARALLEL UNANIMOUS	ae_cp_prj_e	Y	V
1006	LRFP PROF SVCS SELECTION PARALLEL FIRST RESPONSE	ae_cp_prj_e	Y	V
1007	LRFP PREDESIGN INFO ONLY	ae_cp_prj_e	Y	
1008	LRFP SD INFO ONLY	ae_cp_prj_e	Y	
1009	LRFP DD INFO ONLY	ae_cp_prj_e	Y	
1010	LRFP CD INFO ONLY	ae_cp_prj_e	Y	
1011	LRFP VPAF GMP APPROVAL PARALLEL FIRST RESPONSE	ae_cp_prj_e	Y	V
1012	LRFP FUND BALANCE SERIAL	ae_cp_prj_e	Y	V
1013	LRFP CONSTR CLOSEOUT PARALLEL UNANIMOUS	ae_cp_prj_e	Y	V
1014	LRFP FINANCIAL CLOSEOUT SERIAL	ae_cp_prj_e	Y	V
1015	LRFP INTERIOR DESIGN ASSIGN DESIGN ACCT SERIAL	ae_cp_prj_e	Y	V
1016	LRFP INTERIOR DESIGN ESTIMATE APPROVAL SERIAL	ae_cp_prj_e	Y	V
1017	LRFP INTERIOR DESIGN FUND PROJECT SERIAL	ae_cp_prj_e	Y	V
1018	LRFP INTERIOR DESIGN PO SERIAL	ae_cp_prj_e	Y	V



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1019	LRFP INTERIOR DESIGN CONSTR CLOSEOUT PARALLEL UNANIMOUS	ae_cp_prj_e	Y	V
1020	LRFP INTERIOR DESIGN FINANCIAL CLOSOUT SERIAL	ae_cp_prj_e	Y	V
1021	FMCS FUND DESIGN SERIAL	ae_cp_prj_e	Y	V
1022	FMCS ESTIMATING SERIAL	ae_cp_prj_e	Y	V
1023	FMCS ESTIMATE APPROVAL SERIAL	ae_cp_prj_e	Y	V
1024	FMCS FUND CONSTRUCTION SERIAL	ae_cp_prj_e	Y	V
1025	FMCS CONSTR CLOSEOUT PARALLEL UNANIMOUS	ae_cp_prj_e	Y	V
1026	FMCS FINANCIAL CLOSOUT SERIAL	ae_cp_prj_e	Y	V
1027	CMAR UTILITY CONCEPTUAL PLANNING INFO ONLY	ae_cp_prj_e	Y	
1028	CMAR UTILITY BOR PROJ APPROVAL SERIAL	ae_cp_prj_e	Y	V
1029	CMAR UTILITY PROF SVCS SELECTION SERIAL	ae_cp_prj_e	Y	V
1030	CMAR UTILITY ASSIGN DESIGN ACCT PARALLEL UNANIMOUS	ae_cp_prj_e	Y	V
1031	CMAR UTILITY PREDESIGN INFO ONLY	ae_cp_prj_e	Y	
1032	CMAR UTILITY SD INFO ONLY	ae_cp_prj_e	Y	
1033	CMAR UTILITY CD INFO ONLY	ae_cp_prj_e	Y	
1034	CMAR UTILITY DD INFO ONLY	ae_cp_prj_e	Y	
1035	CMAR UTILITY VPAF GMP APPROVAL PARALLEL FIRST RESPONSE	ae_cp_prj_e	Y	V
1036	CMAR UTILITY FUND BALANCE SERIAL	ae_cp_prj_e	Y	V
1037	CMAR UTILITY CONSTR CLOSEOUT PARALLEL UNANIMOUS	ae_cp_prj_e	Y	V
1038	CMAR UTILITY FINANCIAL CLOSEOUT SERIAL	ae_cp_prj_e	Y	V
1039	STANDARD UTILITIES CONCEPTUAL PLANNING INFO ONLY	ae_cp_prj_e	Y	
1040	STANDARD UTILITIES ASSIGN DESIGN ACCT PARALLEL UNANIMOUS	ae_cp_prj_e	Y	V
1041	STANDARD UTILITIES PREDESIGN SERIAL	ae_cp_prj_e	Y	V
1042	STANDARD UTILITIES FUND CONSTRUCTION SERIAL	ae_cp_prj_e	Y	V
1043	STANDARD UTILITIES CONTRACT SETUP PARALLEL UNANIMOUS	ae_cp_prj_e	Y	V
1044	STANDARD UTILITIES CONSTR CLOSEOUT PARALLEL UNANIMOUS	ae_cp_prj_e	Y	V
1045	STANDARD UTILITIES FINANCIAL CLOSEOUT SERIAL	ae_cp_prj_e	Y	V
1046	LANDSCAPE PREDESIGN SERIAL	ae_cp_prj_e	Y	V
1047	LANDSCAPE FUND DESIGN SERIAL	ae_cp_prj_e	Y	V
1048	LANDSCAPE DEVELOP SOW SERIAL	ae_cp_prj_e	N	V
1049	LANDSCAPE ESTIMATING SERIAL	ae_cp_prj_e	N	V
1050	LANDSCAPE ESTIMATE APPROVAL SERIAL	ae_cp_prj_e	Y	V
1051	LANDSCAPE FUND CONSTRUCTION SERIAL	ae_cp_prj_e	Y	V
1052	LANDSCAPE CONSTR CLOSEOUT PARALLEL UNANIMOUS	ae_cp_prj_e	Y	V
1053	LANDSCAPE FINANCIAL CLOSEOUT SERIAL	ae_cp_prj_e	Y	V



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1054	LRFP REQ BOR APPV UNDER REVIEW PARALLEL UNANIMOUS	ae_cp_bud_rev_e	Y	V
1055	LRFP REQ BOR APPV APPROVED PARALLEL FIRST RESPONSE	ae_cp_bud_rev_e	Y	V
1056	LRFP ALLOCATION ADJ MANAGEMENT APPROVAL PARALLEL FIRST RESPONSE	ae_cp_bud_rev_e	Y	V
1057	LRFP BUDGET DEV MANAGEMENT APPROVAL PARALLEL FIRST RESPONSE	ae_cp_bud_rev_e	Y	V
1058	FMCS ABOVE BOR UNDER REVIEW PARALLEL UNANIMOUS	ae_cp_bud_rev_e	Y	V
1059	FMCS ABOVE BOR APPROVED SERIAL	ae_cp_bud_rev_e	Y	V
1060	FMCS ABOVE BOR AWAIT BOR APPROVAL INFO ONLY	ae_cp_bud_rev_e	Y	
1061	FMCS ALLOCATION ADJ MANAGEMENT APPROVAL PARALLEL FIRST RESPONSE	ae_cp_bud_rev_e	Y	V
1062	FMCS BUDGET DEV MANAGEMENT APPROVAL PARALLEL FIRST RESPONSE	ae_cp_bud_rev_e	Y	V
1063	UTIL ABOVE BOR UNDER REVIEW PARALLEL UNANIMOUS	ae_cp_bud_rev_e	Y	V
1064	UTIL ABOVE BOR APPROVED SERIAL	ae_cp_bud_rev_e	Y	V
1065	UTIL ALLOCATION ADJ MANAGEMENT APPROVAL PARALLEL FIRST RESPONSE	ae_cp_bud_rev_e	Y	V
1066	UTIL BUDGET DEV MANAGEMENT APPROVAL PARALLEL FIRST RESPONSE	ae_cp_bud_rev_e	Y	V
1067	LAND ABOVE BOR UNDER REVIEW PARALLEL UNANIMOUS	ae_cp_bud_rev_e	Y	V
1068	LAND ABOVE BOR APPROVED SERIAL	ae_cp_bud_rev_e	Y	V
1069	LAND ALLOCATION ADJ MANAGEMENT APPROVAL PARALLEL FIRST RESPONSE	ae_cp_bud_rev_e	Y	V
1070	LAND BUDGET DEV MANAGEMENT APPROVAL PARALLEL FIRST RESPONSE	ae_cp_bud_rev_e	Y	V
1071	CONSULTANT CONTRACT LRFP REQUEST PROPOSAL SERIAL	ae_cp_consult_con_e	Y	V
1072	CONSULTANT CONTRACT - LRFP UNDER REVIEW PARALLEL UNANIMOUS	ae_cp_consult_con_e	Y	V
1073	CONSULTANT CONTRACT - LRFP REVIEW CONTRACT SERIAL	ae_cp_consult_con_e	Y	V
1074	CONSULTANT CONTRACT - LRFP LEGAL REVIEW SERIAL	ae_cp_consult_con_e	Y	V
1075	CONSULTANT CONTRACT - LRFP LEGAL APPROVED SERIAL	ae_cp_consult_con_e	Y	V
1076	CONSULTANT CONTRACT - LRFP MARKUP REVIEW INFO ONLY	ae_cp_consult_con_e	Y	
1077	CONSULTANT CONTRACT - LRFP EXECUTE CONTRACT SERIAL	ae_cp_consult_con_e	Y	V
1078	CONSULTANT CONTRACT - LRFP AWARDED INFO ONLY	ae_cp_consult_con_e	Y	
1079	CONSULTANT CONTRACT UTILITIES REQUEST PROPOSAL SERIAL	ae_cp_consult_con_e	Y	V



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1080	CONSULTANT CONTRACT - UTILITIES UNDER REVIEW PARALLEL UNANIMOUS	ae_cp_consult_con_e	Y	V
1081	CONSULTANT CONTRACT - UTILITIES REVIEW CONTRACT SERIAL	ae_cp_consult_con_e	Y	V
1082	CONSULTANT CONTRACT - UTILITIES LEGAL REVIEW SERIAL	ae_cp_consult_con_e	Y	V
1083	CONSULTANT CONTRACT - UTILITIES LEGAL APPROVED SERIAL	ae_cp_consult_con_e	Y	V
1084	CONSULTANT CONTRACT - UTILITIES MARKUP REVIEW INFO ONLY	ae_cp_consult_con_e	Y	
1085	CONSULTANT CONTRACT - UTILITIES EXECUTE CONTRACT SERIAL	ae_cp_consult_con_e	Y	V
1086	CONSULTANT CONTRACT - UTILITIES AWARDED INFO ONLY	ae_cp_consult_con_e	Y	
1087	CONSULTANT CONTRACT - ON-CALL LRFPP REQUEST PROPOSAL SERIAL	ae_cp_consult_con_e	Y	V
1088	CONSULTANT CONTRACT - ON-CALL LRFPP REVIEW PROPOSAL SERIAL	ae_cp_consult_con_e	Y	V
1089	CONSULTANT CONTRACT - ON-CALL LRFPP REVIEW TO SERIAL	ae_cp_consult_con_e	Y	V
1090	CONSULTANT CONTRACT - ON-CALL LRFPP AWARDED INFO ONLY	ae_cp_consult_con_e	Y	
1091	CONSULTANT CONTRACT - ON-CALL LANDSCP REVIEW PROPOSAL SERIAL	ae_cp_consult_con_e	Y	V
1092	CONSULTANT CONTRACT - ON-CALL LANDSCP AWARDED INFO ONLY	ae_cp_consult_con_e	Y	
1093	CONSULTANT CONTRACT - ON-CALL FMCS REVIEW PROPOSAL SERIAL	ae_cp_consult_con_e	Y	V
1094	CONSULTANT CONTRACT - ON-CALL FMCS REVIEW TO SERIAL	ae_cp_consult_con_e	Y	V
1095	CONSULTANT CONTRACT - ON-CALL FMCS AWARDED INFO ONLY	ae_cp_consult_con_e	Y	
1096	CONSULTANT CONTRACT - ON-CALL UTIL REVIEW PROPOSAL SERIAL	ae_cp_consult_con_e	Y	V
1097	CONSULTANT CONTRACT - ON-CALL UTIL REVIEW TO SERIAL	ae_cp_consult_con_e	Y	V
1098	CONSULTANT CONTRACT - ON-CALL UTIL AWARDED INFO ONLY	ae_cp_consult_con_e	Y	
1099	CONSULTANT AMENDMENT LRFPP UNDER REVIEW SERIAL	ae_cp_consult_amd	Y	V
1100	CONSULTANT AMENDMENT FMCS UNDER REVIEW SERIAL	ae_cp_consult_amd	Y	V
1101	CONSULTANT AMENDMENT LAND UNDER REVIEW SERIAL	ae_cp_consult_amd	Y	V
1102	CONSULTANT AMENDMENT UTIL UNDER REVIEW SERIAL	ae_cp_consult_amd	Y	V
1103	CONSULTANT AMENDMENT LRFPP APPROVED PARALLEL UNANIMOUS	ae_cp_consult_amd	Y	V



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1104	CONSULTANT AMENDMENT FM APPROVED PARALLEL UNANIMOUS	ae_cp_consult_amd	Y	V
1105	CONSTRUCTION CONTRACT - CMAR LRF REQUEST PROPOSAL SERIAL	ae_cp_construct_con_e	Y	V
1106	CONSTRUCTION CONTRACT - CMAR LRF UNDER REVIEW PARALLEL UNANIMOUS	ae_cp_construct_con_e	Y	V
1107	CONSTRUCTION CONTRACT - CMAR LRF REVIEW CONTRACT SERIAL	ae_cp_construct_con_e	Y	V
1108	CONSTRUCTION CONTRACT - CMAR LRF LEGAL REVIEW SERIAL	ae_cp_construct_con_e	Y	V
1109	CONSTRUCTION CONTRACT - CMAR LRF LEGAL APPROVED SERIAL	ae_cp_construct_con_e	Y	V
1110	CONSTRUCTION CONTRACT - CMAR LRF MARKUP REVIEW INFO ONLY	ae_cp_construct_con_e	Y	
1111	CONSTRUCTION CONTRACT - CMAR LRF EXECUTE CONTRACT SERIAL	ae_cp_construct_con_e	Y	V
1112	CONSTRUCTION CONTRACT - CMAR LRF AWARDED INFO ONLY	ae_cp_construct_con_e	Y	
1113	CONSTRUCTION CONTRACT - LRF HARD BID READY TO ADVERTISE SERIAL	ae_cp_construct_con_e	Y	V
1114	CONSTRUCTION CONTRACT - LRF HARD BID ADVERTISE SERIAL	ae_cp_construct_con_e	Y	V
1115	CONSTRUCTION CONTRACT - LRF HARD BID BID OPENING INFO ONLY	ae_cp_construct_con_e	Y	
1116	CONSTRUCTION CONTRACT - LRF HARD BID UNDER REVIEW PARALLEL UNANIMOUS	ae_cp_construct_con_e	Y	V
1117	CONSTRUCTION CONTRACT - LRF HARD BID REVIEW CONTRACT SERIAL	ae_cp_construct_con_e	Y	V
1118	CONSTRUCTION CONTRACT - LRF HARD BID LEGAL REVIEW SERIAL	ae_cp_construct_con_e	Y	V
1119	CONSTRUCTION CONTRACT - LRF HARD BID LEGAL APPROVED SERIAL	ae_cp_construct_con_e	Y	V
1120	CONSTRUCTION CONTRACT - LRF HARD BID MARKUP REVIEW INFO ONLY	ae_cp_construct_con_e	Y	
1121	CONSTRUCTION CONTRACT - LRF HARD BID EXECUTE CONTRACT SERIAL	ae_cp_construct_con_e	Y	V
1122	CONSTRUCTION CONTRACT - LRF HARD BID AWARDED INFO ONLY	ae_cp_construct_con_e	Y	
1123	CONSTRUCTION CONTRACT - FM LOW BID READY TO ADVERTISE PARALLEL FIRST RESPONSE	ae_cp_construct_con_e	Y	V
1124	CONSTRUCTION CONTRACT - FM LOW BID ADVERTISE SERIAL	ae_cp_construct_con_e	Y	V
1125	CONSTRUCTION CONTRACT - FM LOW BID UNDER REVIEW PARALLEL UNANIMOUS	ae_cp_construct_con_e	Y	V
1126	CONSTRUCTION CONTRACT - FM LOW BID NTP INFO ONLY	ae_cp_construct_con_e	Y	
1127	CONSTRUCTION CONTRACT - CMAR UTILITY REQUEST PROPOSAL SERIAL	ae_cp_construct_con_e	Y	V



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1128	CONSTRUCTION CONTRACT - CMAR UTILITY UNDER REVIEW PARALLEL UNANIMOUS	ae_cp_construct_con_e	Y	V
1129	CONSTRUCTION CONTRACT - CMAR UTILITY REVIEW CONTRACT SERIAL	ae_cp_construct_con_e	Y	V
1130	CONSTRUCTION CONTRACT - CMAR UTILITY LEGAL REVIEW SERIAL	ae_cp_construct_con_e	Y	V
1131	CONSTRUCTION CONTRACT - CMAR UTILITY LEGAL APPROVED SERIAL	ae_cp_construct_con_e	Y	V
1132	CONSTRUCTION CONTRACT - CMAR UTILITY MARKUP REVIEW INFO ONLY	ae_cp_construct_con_e	Y	
1133	CONSTRUCTION CONTRACT - CMAR UTILITY EXECUTE CONTRACT SERIAL	ae_cp_construct_con_e	Y	V
1134	CONSTRUCTION CONTRACT - CMAR UTILITY AWARDED INFO ONLY	ae_cp_construct_con_e	Y	
1135	CONSTRUCTION CONTRACT - ENERGY SPC DEVELOP FIM INFO ONLY	ae_cp_construct_con_e	Y	
1136	CONSTRUCTION CONTRACT - ENERGY SPC FIM REVIEW SERIAL	ae_cp_construct_con_e	Y	V
1137	CONSTRUCTION CONTRACT - ENERGY SPC FIM APPROVAL SERIAL	ae_cp_construct_con_e	Y	V
1138	CONSTRUCTION CONTRACT - ENERGY SPC REVIEW CONTRACT SERIAL	ae_cp_construct_con_e	Y	V
1139	CONSTRUCTION CONTRACT - ENERGY SPC LEGAL REVIEW SERIAL	ae_cp_construct_con_e	Y	V
1140	CONSTRUCTION CONTRACT - ENERGY SPC AWAIT CONTRACTOR SIG SERIAL	ae_cp_construct_con_e	Y	V
1141	CONSTRUCTION CONTRACT - ENERGY SPC MARKUP REVIEW INFO ONLY	ae_cp_construct_con_e	Y	
1142	CONSTRUCTION CONTRACT - ENERGY SPC EXECUTE CONTRACT SERIAL	ae_cp_construct_con_e	Y	V
1143	CONSTRUCTION CONTRACT - ENERGY SPC AWARDED INFO ONLY	ae_cp_construct_con_e	Y	
1144	CONSTRUCTION CONTRACT - ENERGY SPC M&V BASELINE SERIAL	ae_cp_construct_con_e	Y	V
1145	CONSTRUCTION CONTRACT - ENERGY SPC M&V PERIOD INFO ONLY	ae_cp_construct_con_e	Y	
1146	CONSTRUCTION CONTRACT - OCCM REVIEW TO SERIAL	ae_cp_construct_con_e	Y	V
1147	CONSTRUCTION CONTRACT - OCCM AWARDED INFO ONLY	ae_cp_construct_con_e	Y	
1148	CONSTRUCTION CONTRACT - AS NEEDED REVIEW TO SERIAL	ae_cp_construct_con_e	Y	V
1149	CONSTRUCTION CONTRACT - AS NEEDED AWARDED INFO ONLY	ae_cp_construct_con_e	Y	
1150	CCP - LRFPP UNDER REVIEW SERIAL	ae_cp_change_pro	Y	V
1151	CCP - LRFPP APPROVED SERIAL	ae_cp_change_pro	Y	V
1152	CCP - FMCS UNDER REVIEW SERIAL	ae_cp_change_pro	Y	V
1153	CCP - FMCS APPROVED SERIAL	ae_cp_change_pro	Y	V



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1154	CCP - LANDSCAPE UNDER REVIEW SERIAL	ae_cp_change_pro	Y	V
1155	CCP - LANDSCAPE APPROVED SERIAL	ae_cp_change_pro	Y	V
1156	CCP - UTILITIES UNDER REVIEW SERIAL	ae_cp_change_pro	Y	V
1157	CCP - UTILITIES APPROVED SERIAL	ae_cp_change_pro	Y	V
1158	CO - LRFP UNDER REVIEW SERIAL	ae_cp_const_con_co	Y	V
1159	CO - FMCS UNDER REVIEW SERIAL	ae_cp_const_con_co	Y	V
1160	CO - LAND UNDER REVIEW SERIAL	ae_cp_const_con_co	Y	V
1161	CO - UTIL UNDER REVIEW SERIAL	ae_cp_const_con_co	Y	V
1162	CO - BOR APPROVAL SERIAL	ae_cp_const_con_co	Y	V
1163	CO - LRFP APPROVED PARALLEL UNANIMOUS	ae_cp_const_con_co	Y	V
1164	CO - FM APPROVED PARALLEL UNANIMOUS	ae_cp_const_con_co	Y	V
1165	IWA - LRFP ESTIMATE APPROVAL SERIAL	ae_cp_int_work_agree	Y	V
1166	IWA - LRFP ARCH ESTIMATE APPROVAL SERIAL	ae_cp_int_work_agree	Y	V
1167	IWA - LRFP INT DESIGN ESTIMATE APPROVAL SERIAL	ae_cp_int_work_agree	Y	V
1168	IWA AMENDMENT FMCS REVIEW SERIAL	ae_cp_int_work_amd	Y	V
1169	IWA AMENDMENT CT MEP REVIEW SERIAL	ae_cp_int_work_amd	Y	V
1170	IWA AMENDMENT CT STRUCTURAL REVIEW SERIAL	ae_cp_int_work_amd	Y	V
1171	IWA AMENDMENT SUPPORT SHOPS REVIEW SERIAL	ae_cp_int_work_amd	Y	V
1172	IWA AMENDMENT LANDSCAPE REVIEW SERIAL	ae_cp_int_work_amd	Y	V
1173	IWA AMENDMENT UTILITIES REVIEW SERIAL	ae_cp_int_work_amd	Y	V
1174	IWA AMENDMENT ASBESTOS REVIEW SERIAL	ae_cp_int_work_amd	Y	V
1175	IWA AMENDMENT EHS REVIEW SERIAL	ae_cp_int_work_amd	Y	V
1176	IWA AMENDMENT LRFP REVIEW SERIAL	ae_cp_int_work_amd	Y	V
1177	IWA AMENDMENT IT REVIEW SERIAL	ae_cp_int_work_amd	Y	V
1178	IWA AMENDMENT PM APPROVAL SERIAL	ae_cp_int_work_amd	Y	V
1179	UAL - DESIGN REVIEW UNDER REVIEW PARALLEL	ae_cp_ual_e	Y	V
1180	UAL - BUILDING PERMIT UNDER REVIEW PARALLEL FIRST RESPONSE	ae_cp_ual_e	Y	V
1181	UAL - BUILDING PERMIT PM CORRECTIONS SERIAL	ae_cp_ual_e	Y	V
1182	UAL - BUILDING PERMIT FIRE MARSHALL REVIEW SERIAL	ae_cp_ual_e	Y	V
1183	UAL - BUILDING PERMIT ISSUED INFO ONLY	ae_cp_ual_e	Y	
1184	UAL - OCCUPANCY UNDER REVIEW PARALLEL FIRST RESPONSE	ae_cp_ual_e	Y	V
1185	UAL - OCCUPANCY PM CORRECTIONS SERIAL	ae_cp_ual_e	Y	V
1186	UAL - OCCUPANCY FIRE MARSHALL REVIEW SERIAL	ae_cp_ual_e	Y	V
1187	UAL - OCCUPANCY ISSUED PARTIAL INFO ONLY	ae_cp_ual_e	Y	
1188	UAL - OCCUPANCY ISSUED FULL INFO ONLY	ae_cp_ual_e	Y	
1189	CONSULT INVOICE UNDER REVIEW SERIAL	ae_cp_consult_inv	Y	V
1190	CONSULT INVOICE CONSULT INPUT REQ SERIAL	ae_cp_consult_inv	Y	V
1191	CONSULT INVOICE APPROVED FOR PMT SERIAL	ae_cp_consult_inv	Y	V
1192	PAY APP UNDER REVIEW SERIAL	ae_cp_pay_app	Y	V
1193	PAY APP CONTRA INPUT REQ SERIAL	ae_cp_pay_app	Y	V
1194	PAY APP APPROVED FOR PMT SERIAL	ae_cp_pay_app	Y	V



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1196	CONSULTANT CONTRACT - ON-CALL LANDSCP REVIEW TO SERIAL	ae_cp_consult_con_e	Y	V
1197	JAMES TEST WORKFLOW	ae_cp_prj_e	Y	V



CAPITAL PROJECTS MODULE CONFIGURATION AND SETUP

ACTIVITIES

Activity	Description	Active
100% DD	100% DESIGN DEVELOPMENT SUBMITTAL RECEIVED (START), 100% DESIGN DEVELOPMENT WORKSHOP DATE (END)	Y
100% SD	100% SCHEMATIC SUBMITTAL RECEIVED (START), 100% SCHEMATIC DESIGN WORKSHOP DATE (END)	Y
50% CD	50% CONSTRUCTION DOCUMENT SUBMITTAL RECEIVED (START), 50% CONSTRUCTION DOCUMENTS WORKSHOP DATE (END)	Y
50% DD	100% DESIGN DEVELOPMENT SUBMITTAL RECEIVED (START), 100% DESIGN DEVELOPMENT WORKSHOP DATE (END)	Y
50% SD	50% SCHEMATIC SUBMITTAL RECEIVED (START), 50% SCHEMATIC DESIGN WORKSHOP DATE (END)	Y
95% CD	95% CONSTRUCTION DOCUMENT SUBMITTAL RECEIVED (START), 95% CONSTRUCTION DOCUMENTS WORKSHOP DATE (END)	Y
ADVERTISEMENT	PROJECT ADVERTISED ONTO OK CORRAL, BIDS RECEIVED	Y
ARCHITECT CONTRACT	A/E CONTRACT DRAFTED AND IN SIGNATURE PROCESS	Y
BID EVAL	BIDS RECEIVED AND BEING EVALUATED	Y
BID PACKAGE 1	BID PACKAGE RECEIVED (START), BID PACKAGE AWARDED (END)	Y
BID PACKAGE 2	BID PACKAGE RECEIVED (START), BID PACKAGE AWARDED (END)	Y
BID PACKAGE 3	BID PACKAGE RECEIVED (START), BID PACKAGE AWARDED (END)	Y
BID SET	BID SET SUBMITTAL RECEIVED (START), TURNOVER DOCUMENT REVIEW MEETING DATE (END)	Y
BOR A/E SELECTION	RECEIVE BOARD OF REGENTS APPROVAL TO START THE SELECTION PROCESS AND TO SELECT THE RECOMMENDED FIRM	Y
BOR APPROVALS	PROJECT APPROVAL	Y
BOR CM@R	RECEIVE BOARD OF REGENTS APPROVAL TO START THE SELECTION PROCESS AND TO SELECT THE RECOMMENDED CM	Y
BOR PURCH APPROVE	RECEIVE BOARD OF REGENTS APPROVAL FOR PROJECTS PROCURED VIA PURCHASING PROCESS	Y
CLOSEOUT	FINANCIAL CLOSEOUT	Y
CM CONTRACT	CM SELECTION (START), AWARDED CONTRACT (END)	Y
COMMISSIONING	COMMISSIONING START AND FINISH	Y
COMMISSIONING CONTR	COMMISSIONING CONTRACT DATE (COMMISSIONING CONTRACT AWARD DATE)	Y
DESIGN	DESIGN AND SPECIFICATIONS DEVELOPMENT	Y
INSURANCE/BONDING	CONTRACTOR HAS SECURED APPLICABLE INSURANCE AND BONDING FOR THE PROJECT	Y
LEED CERTIFICATION	LEED CERTIFICATION	Y
MEASURE AND VERIF	MEASUREMENT AND VERIFICATION START	Y
NTP TO PUNCHLIST	NOTICE TO PROCEED HAS BEEN ISSUED AT START, FINAL PUNCHLIST/WALKTHROUGH AT END	Y



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PERMITTING	NECESSARY PERMITS SUBMITTED FOR APPROVAL AND RECEIVED	Y
PLANNED BUDGET APPR	CUSTOMER PLANNED BUDGET APPROVAL DATE	Y
PM ASSIGNMENT	DESIGN AND CONSTRUCTION PROJECT MANAGER ASSIGNMENT DATE	Y
PO ISSUE	AWARDED TO PURCHASE ORDER ISSUED TO AWARDED CONTRACTOR	Y
PRE-DESIGN KICKOFF	PRE DESIGN KICKOFF MEETING DATE	Y
PRELIM SCOPING MTG	PRELIMINARY SCOPING MEETING. MEETING WITH USERS TO ENSURE THE NEEDS ARE FULLY UNDERSTOOD	Y
PRJ PKG AT FM SUPPLY	PROJECT PACKAGE SUBMITTED TO FACILITIES MAINTENANCE SUPPLY FOR SUBMISSION INTO OK CORRAL	Y
PROGRAMMING WORKSHOP	PROGRAMMING WORKSHOP DATE	Y
PROJECT BUDGET	(BCL) FULL PROJECT BUDGET TO INCLUDE SCOPE, SUPPORT, ETC	Y
PROJECT DESC DOC APP	PROJECT DESCRIPTION DOCUMENT APPROVAL DATE	Y
PURCH PKG COMPLETE	FULL DESIGN, SPECIFICATIONS, BID PACKAGE COMPLETED AND READY FOR PURCHASING	Y
PURCHASING	PROJECT PROVIDED TO FM SUPPLY, SENT TO PURCHASING AND PRIOR TO ADVERTISEMENT	Y
SUBST COMPLETION	CERTIFICATE OF OCCUPANCY AT START; CONSTRUCTION COMPLETE AT END	Y
UNIVERSITY COST EST	UNIVERSITY COST ESTIMATE DEVELOPED FOR PROJECT SCOPE	Y
WARRANTY	CONTRACTOR 12 MONTH WARRANTY	Y

MILESTONES

Milestone	Description	Active
50% CD REVIEW	CONSTRUCTION DOCUMENTS UNDERWAY, 50% CD (END)	Y
50% DD REVIEW	DESIGN DEVELOPMENT IS UNDERWAY, 50% DD (END)	Y
50% SD REVIEW	SCHEMATIC DESIGN IS UNDERWAY, 50% SD (END)	Y
95% CD REVIEW	CONSTRUCTION DOCUMENTS UNDERWAY, 95% CD (END)	Y
A/E APPROVAL	A/E SELECTION APPROVED	Y
BID	PROJECT BID DATE, ADVERTISEMENT (START)	Y
BID PACKAGE 1	BID PACKAGE AWARDED, BID PACKAGE 1 (END)	Y
BID PACKAGE 2	BID PACKAGE AWARDED, BID PACKAGE 2 (END)	Y
BID PACKAGE 3	BID PACKAGE AWARDED, BID PACKAGE 3 (END)	Y
BOARD APPROVAL	PROJECT APPROVED BY BOARD OF REGENTS	Y
CD COMPLETE	THE CD WORKSHOP HAS BEEN COMPLETED AND APPROVAL HAS BEEN GIVEN TO PROCEED TO BID DOCS, BID SET (END)	Y
CERT OF OCCUPANCY	CERTIFICATE RECEIVED FROM AHJ, (MANUAL ENTRY BY PM)	Y
CM CONTRACT AWARD	CONTRACT FULLY EXECUTED, CM CONTRACT (END)	Y
CMAR APPROVAL	CMAR SELECTION APPROVED	Y
COMMISS COMPLETED	COMMISSIONING OF THE BUILDING COMPONENTS COMPLETE W/ CERTIFICATE (MANUAL ENTRY BY PM)	Y
CONST CLOSEOUT	CLOSEOUT (START)	Y



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CONST COMPLETE	SUBSTANTIAL COMPLETE (END)	Y
CONSTRUCTION START	THE CONSTRUCTION START, (MANUAL ENTRY BY PM)	Y
DD COMPLETE	THE DD WORKSHOP HAS BEEN COMPLETED AND APPROVAL HAS BEEN GIVEN TO PROCEED TO CD, 100% DD (END)	Y
DESIGN COMPLETE	PURCHASING PACKAGE COMPLETE (END)	Y
DESIGN CONTRACT AWD	A CONTRACT HAS BEEN ISSUED TO DESIGN THE PROJECT OR DESIGN HAS STARTED; ARCHITECT CONTRACT (END)	Y
FINANCIAL CLOSEOUT	CLOSEOUT (END)	Y
LEED CERTIFICATION	DATE CERTIFICATION IS RECEIVED (MANUAL ENTRY BY PM)	Y
MOVE IN	MOVE IN (MANUAL ENTRY BY PM)	Y
NTP	A CONTRACT HAS BEEN ISSUED OR AN INTERNAL WORK AGREEMENT IS IN PLACE TO CONSTRUCT THE PROJECT, NTP TO PUNCHLIST (START)	Y
PERMITTING	DATE PERMIT IS RECEIVED, PERMITTING (END)	Y
PLANNING COMPLETE	PROJECT DESCRIPTION DOCUMENT APPROVAL DATE (END)	Y
PO ISSUED	PO ISSUED (END)	Y
PROJECT CLOSEOUT	CLOSEOUT (END)	Y
SD COMPLETE	THE SCHEMATICS WORKSHOP HAS BEEN COMPLETED AND APPROVAL HAS BEEN GIVEN TO PROCEED TO CD, 100% SD (END)	Y
START M&V	START OF MEASUREMENT AND VERIFICATION (ENERGY SAVINGS CONTRACT ONLY)	Y
SUBST COMPLETION	CERTIFICATE OF OCCUPANCY RECEIVED, SUBSTANTIAL COMPLETE (START)	Y
WARRANTY END	WARRANTY (END)	Y
WARRANTY START	WARRANTY (START)	Y

COMPONENT TYPES

Type	Description	Timesheet	Active
HARD COST	HARD COST	N	Y
RESERVE	RESERVE	N	Y
SOFT COST	SOFT COST	N	Y
TIME	CAPITAL PROJECT TIMESHEETS	N	Y

COMPONENT STATUS CODES

Status	Type	Description	Sequence	Status Flag	Active
PENDING	HARD COST	PENDING	100	P	Y
ACTIVE	HARD COST	ACTIVE	200	A	Y
WORK COMPLETE	HARD COST	WORK COMPLETE	900	W	Y
CLOSED	HARD COST	CLOSED	950	C	Y
CANCELED	HARD COST	CANCELED	999	L	Y
PENDING	RESERVE	PENDING	100	P	Y



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ACTIVE	RESERVE	ACTIVE	200	A	Y
WORK COMPLETE	RESERVE	WORK COMPLETE	900	W	Y
CLOSED	RESERVE	CLOSED	950	C	Y
CANCELED	RESERVE	CANCELED	999	L	Y
PENDING	SOFT COST	PENDING	100	P	Y
ACTIVE	SOFT COST	ACTIVE	200	A	Y
WORK COMPLETE	SOFT COST	WORK COMPLETE	900	W	Y
CLOSED	SOFT COST	CLOSED	950	C	Y
CANCELED	SOFT COST	CANCELED	999	L	Y
PENDING	TIME	PENDING	100	P	Y
ACTIVE	TIME	ACTIVE	200	A	Y
WORK COMPLETE	TIME	WORK COMPLETE	900	W	Y
CLOSED	TIME	CLOSED	950	C	Y
CANCELED	TIME	CANCELED	999	L	Y

COMPONENTS

Component	Description	Type	Active
A&E DESIGN FEES	A&E DESIGN FEES	SOFT COST	Y
A&E REIMBURSABLE	A&E REIMBURSABLE	SOFT COST	Y
ABATEMENT	ABATEMENT	HARD COST	Y
AHJ (REVIEWS, INSP)	AHJ (REVIEWS, INSPECTIONS)	SOFT COST	Y
ART FEE	ART FEE	HARD COST	Y
ASBESTOS MISC	ASBESTOS MISC	HARD COST	Y
ASBESTOS RESERVE	ASBESTOS RESERVE	RESERVE	Y
BLDG NETWORK EQUIPMENT	BUILDING NETWORK EQUIPMENT	HARD COST	Y
BONDS/INSURANCE	BONDS/INSURANCE	SOFT COST	Y
BUILDING AUTOMATION	BUILDING AUTOMATION	HARD COST	Y
CABLING/FIBER	CROSS CAMPUS CABLING/FIBER	HARD COST	Y
CHILLED WATER	CHILLED WATER	HARD COST	Y
CIVIL CONSULTANT	CIVIL CONSULTANT	SOFT COST	Y
CM PRECON SERVICES	CM PRECONSTRUCTION SERVICES	SOFT COST	Y
CMAR FEE	CMAR FEE	SOFT COST	Y
CMAR GENERAL REQ	CMAR GENERAL REQUIREMENTS	HARD COST	Y
CONSTRUCTION MISC	INCLUDES O&M MANUALS	HARD COST	Y
CONSULTANT	CONSULTANT	SOFT COST	Y
CONTINGENCY	CONTINGENCY	HARD COST	Y
DIRECT CONSTRUCTION	DIRECT CONSTRUCTION	HARD COST	Y
DOMESTIC WATER	DOMESTIC WATER	HARD COST	Y
ELECTRICAL	ELECTRICAL	HARD COST	Y
EQUIPMENT	EQUIPMENT	HARD COST	Y
EQUIPMENT MISC	EQUIPMENT MISC	HARD COST	Y



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FACILITIES MGMT MISC	FACILITIES MGMT MISC	SOFT COST	Y
FACILITIES MGMT SUPPORT	FACILITIES MGMT SUPPORT	HARD COST	Y
FACILITY IMPROVE MEASURE	FACILITY IMPROVE MEASURE	HARD COST	Y
FEES MISC	FEES MISC	SOFT COST	Y
FF&E	FF&E	HARD COST	Y
GENERAL REQUIREMENTS	GENERAL REQUIREMENTS	HARD COST	Y
LANDSCAPE CONSULTANT	LANDSCAPE CONSULTANT	SOFT COST	Y
LRFP (REIMBURSABLE)	LRFP (REIMBURSABLE)	SOFT COST	Y
LRFP COMMISSIONING	LRFP COMMISSIONING	SOFT COST	Y
LRFP FF&E CONSULTANT	LRFP FF&E CONSULTANT	SOFT COST	Y
LRFP PROJECT ADMIN FEE	LRFP PROJECT ADMINISTRATION FEE	SOFT COST	Y
MEASUREMENT&VERIFICATION	MEASUREMENT&VERIFICATION	SOFT COST	Y
MEP CONSULTANT	MEP CONSULTANT	SOFT COST	Y
MOVABLE EQUIPMENT	MOVABLE EQUIPMENT	HARD COST	Y
NATURAL GAS	NATURAL GAS	HARD COST	Y
OFF-SITE UTILITIES	OFF-SITE UTILITIES	HARD COST	Y
OVERHEAD	OVERHEAD	HARD COST	Y
PERMITS	PERMITS	SOFT COST	Y
PROFIT	PROFIT	HARD COST	Y
PROJECT RESERVE	PROJECT RESERVE	RESERVE	Y
SANITARY SEWER	SANITARY SEWER	HARD COST	Y
SITE CONSTRUCTION	SITE CONSTRUCTION	HARD COST	Y
SOILS INVESTIGATION	SOILS INVESTIGATION	SOFT COST	Y
SPECIAL CONSTRUCTION	SPECIAL CONSTRUCTION	HARD COST	Y
SPECIAL CONSULTANT	SPECIAL CONSULTANT	SOFT COST	Y
STEAM	STEAM	HARD COST	Y
STORM SEWER	STORM SEWER	HARD COST	Y
STRUCTURAL CONSULTANT	STRUCTURAL CONSULTANT	SOFT COST	Y
SURVEY	SURVEY	SOFT COST	Y

COMPONENT GROUPS

Component Group	Description	Active
ASBESTOS CMAR UTIL	ASBESTOS	Y
ASBESTOS FMCS	ASBESTOS	Y
ASBESTOS LRFP	ASBESTOS	Y
ASBESTOS STAND UTIL	ASBESTOS	Y
CAMPUS SUPT CMAR UTIL	CAMPUS SUPPORT	Y
CAMPUS SUPT FMCS	CAMPUS SUPPORT	Y
CAMPUS SUPT LANDSCAPE	CAMPUS SUPPORT	Y
CAMPUS SUPT LRFP	CAMPUS SUPPORT	Y
CAMPUS SUPT LRFP INT DES	CAMPUS SUPPORT	Y



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CAMPUS SUPT STAND UTIL	CAMPUS SUPPORT	Y
CONSTRUCTION CMAR UTIL	CONSTRUCTION	Y
CONSTRUCTION FMCS	CONSTRUCTION	Y
CONSTRUCTION LANDSCAPE	CONSTRUCTION	Y
CONSTRUCTION LRFP	CONSTRUCTION	Y
CONSTRUCTION STAND UTIL	CONSTRUCTION	Y
EQUIPMENT CMAR UTIL	EQUIPMENT	Y
EQUIPMENT FMCS	EQUIPMENT	Y
EQUIPMENT LANDSCAPE	EQUIPMENT	Y
EQUIPMENT LRFP	EQUIPMENT	Y
EQUIPMENT LRFP INT DES	EQUIPMENT	Y
EQUIPMENT STAND UTIL	EQUIPMENT	Y
FEES CMAR UTIL	FEES	Y
FEES FMCS	FEES	Y
FEES LANDSCAPE	FEES	Y
FEES LRFP	FEES	Y
FEES LRFP INT DES	FEES	Y
FEES STAND UTIL	FEES	Y
RESERVE	RESERVE	Y

CAPITAL PROJECT TYPES

Type	Description	Active
CMAR UTILITY	CONSTRUCTION MANAGER AT RISK UTILITY PROJECT	Y
FMCS	FACILITIES MANAGEMENT CONSTRUCTION SERVICES PROJECT	Y
LANDSCAPE	LANDSCAPE PROJECT	Y
LRFP	LONG RANGE FACILITIES PLANNING PROJECT	Y
LRFP INTERIOR DESIGN	LONG RANGE FACILITIES PLANNING INTERIOR DESIGN PROJECT	Y
STANDARD UTILITIES	STANDARD UTILITIES PROJECT	Y

CAPITAL PROJECT STATUS CODES

Status	Type	Description	Sequence	Status Flag	Active
INITIATION	CMAR UTILITY	INITIATION	100	P	Y
PM ASSIGNMENT	CMAR UTILITY	PM ASSIGNMENT	110	P	Y
CONCEPTUAL PLANNING	CMAR UTILITY	CONCEPTUAL PLANNING	120	P	Y
BOR PROJ APPROVAL	CMAR UTILITY	BOR PROJ APPROVAL	150	P	Y
ASSIGN DESIGN ACCT	CMAR UTILITY	ASSIGN DESIGN ACCT	160	A	Y
PROF SVCS SELECTION	CMAR UTILITY	PROF SVCS SELECTION	170	A	Y
BOR SELECT	CMAR UTILITY	BOR SELECT	180	A	Y
PREDESIGN	CMAR UTILITY	PREDESIGN	190	A	Y
CLIENT DESIGN APP	CMAR UTILITY	CLIENT DESIGN APP	200	A	Y



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SD	CMAR UTILITY	SD	290	A	Y
DD	CMAR UTILITY	DD	300	A	Y
CD	CMAR UTILITY	CD	310	A	Y
VPAF GMP APPROVAL	CMAR UTILITY	VPAF GMP APPROVAL	320	A	Y
FUND BALANCE	CMAR UTILITY	FUND BALANCE	330	A	Y
NTP	CMAR UTILITY	NTP	380	A	Y
CONSTRUCTION	CMAR UTILITY	CONSTRUCTION	390	A	Y
CONSTR CLOSEOUT	CMAR UTILITY	CONSTR CLOSEOUT	400	A	Y
FINANCIAL CLOSEOUT	CMAR UTILITY	FINANCIAL CLOSEOUT	420	A	Y
CLOSED	CMAR UTILITY	CLOSED	900	L	Y
ON HOLD	CMAR UTILITY	ON HOLD	980	A	Y
DECLINED	CMAR UTILITY	DECLINED	990	L	Y
CANCELED	CMAR UTILITY	CANCELED	999	C	Y
INITIATION	FMCS	INITIATION	100	P	Y
PM ASSIGNMENT	FMCS	PM ASSIGNMENT	110	P	Y
CONCEPTUAL PLANNING	FMCS	CONCEPTUAL PLANNING	120	P	Y
PREDESIGN	FMCS	PREDESIGN	190	A	Y
CLIENT DESIGN APP	FMCS	CLIENT DESIGN APP	200	A	Y
FORFUN	FMCS	FUN	210	P	Y
FUND DESIGN	FMCS	FUND DESIGN	210	A	Y
DESIGN	FMCS	DESIGN	230	A	Y
DEVELOP SOW	FMCS	DEVELOP SOW	240	A	Y
SOW APPROVAL	FMCS	SOW APPROVAL	250	A	Y
CONTRACT SETUP	FMCS	CONTRACT SETUP	260	A	Y
ESTIMATING	FMCS	ESTIMATING	270	A	Y
ESTIMATE APPROVAL	FMCS	ESTIMATE APPROVAL	280	A	Y
FUND CONSTRUCTION	FMCS	FUND CONSTRUCTION	350	A	Y
NTP	FMCS	NTP	380	A	Y
CONSTRUCTION	FMCS	CONSTRUCTION	390	A	Y
CONSTR CLOSEOUT	FMCS	CONSTR CLOSEOUT	400	A	Y
FINANCIAL CLOSEOUT	FMCS	FINANCIAL CLOSEOUT	420	A	Y
PROJECT CLOSEOUT	FMCS	PROJECT CLOSEOUT	430	A	Y
CLOSED	FMCS	CLOSED	900	L	Y
ON HOLD	FMCS	ON HOLD	980	A	Y
DECLINED	FMCS	DECLINED	990	L	Y
CANCELED	FMCS	CANCELED	999	C	Y
INITIATION	LANDSCAPE	INITIATION	100	P	Y
CONCEPTUAL PLANNING	LANDSCAPE	CONCEPTUAL PLANNING	120	P	Y
ASSIGN DESIGN ACCT	LANDSCAPE	ASSIGN DESIGN ACCT	160	A	Y
PREDESIGN	LANDSCAPE	PREDESIGN	190	A	Y
CLIENT DESIGN APP	LANDSCAPE	CLIENT DESIGN APP	200	A	Y



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FUND DESIGN	LANDSCAPE	FUND DESIGN	210	A	Y
DESIGN	LANDSCAPE	DESIGN	230	A	Y
DEVELOP SOW	LANDSCAPE	DEVELOP SOW	240	A	Y
SOW APPROVAL	LANDSCAPE	SOW APPROVAL	250	A	Y
CONTRACT SETUP	LANDSCAPE	CONTRACT SETUP	260	A	Y
ESTIMATING	LANDSCAPE	ESTIMATING	270	A	Y
ESTIMATE APPROVAL	LANDSCAPE	ESTIMATE APPROVAL	280	A	Y
FUND CONSTRUCTION	LANDSCAPE	FUND CONSTRUCTION	350	A	Y
NTP	LANDSCAPE	NTP	380	A	Y
CONSTRUCTION	LANDSCAPE	CONSTRUCTION	390	A	Y
CONSTR CLOSEOUT	LANDSCAPE	CONSTR CLOSEOUT	400	A	Y
FINANCIAL CLOSEOUT	LANDSCAPE	FINANCIAL CLOSEOUT	420	A	Y
PROJECT CLOSEOUT	LANDSCAPE	PROJECT CLOSEOUT	430	A	Y
CLOSED	LANDSCAPE	CLOSED	900	L	Y
ON HOLD	LANDSCAPE	ON HOLD	980	A	Y
DECLINED	LANDSCAPE	DECLINED	990	L	Y
CANCELED	LANDSCAPE	CANCELED	999	C	Y
INITIATION	LRFP	INITIATION	100	P	Y
CONCEPTUAL PLANNING	LRFP	CONCEPTUAL PLANNING	120	P	Y
DEVELOP FUNDING AGMT	LRFP	DEVELOP FUNDING AGMT	130	P	Y
VPAF APPROVAL	LRFP	VPAF APPROVAL	140	P	Y
BOR PROJ APPROVAL	LRFP	BOR PROJ APPROVAL	150	P	Y
ASSIGN DESIGN ACCT	LRFP	ASSIGN DESIGN ACCT	160	A	Y
PROF SVCS SELECTION	LRFP	PROF SVCS SELECTION	170	A	Y
BOR SELECT	LRFP	BOR SELECT	180	A	Y
PREDESIGN	LRFP	PREDESIGN	190	A	Y
CLIENT DESIGN APP	LRFP	CLIENT DESIGN APP	200	A	Y
VPAF PREDESIGN APP	LRFP	VPAF PREDESIGN APP	220	A	Y
SD	LRFP	SD	290	A	Y
VPAF SD APP	LRFP	VPAF SD APP	295	A	Y
DD	LRFP	DD	300	A	Y
CD	LRFP	CD	310	A	Y
VPAF GMP APPROVAL	LRFP	VPAF GMP APPROVAL	320	A	Y
FUND BALANCE	LRFP	FUND BALANCE	330	A	Y
NTP	LRFP	NTP	380	A	Y
CONSTRUCTION	LRFP	CONSTRUCTION	390	A	Y
CONSTR CLOSEOUT	LRFP	CONSTR CLOSEOUT	400	A	Y
FINANCIAL CLOSEOUT	LRFP	FINANCIAL CLOSEOUT	420	A	Y
PROJECT CLOSEOUT	LRFP	PROJECT CLOSEOUT	430	A	Y
CLOSED	LRFP	CLOSED	900	L	Y
ON HOLD	LRFP	ON HOLD	980	A	Y



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DECLINED	LRFP	DECLINED	990	L	Y
CANCELED	LRFP	CANCELED	999	C	Y
INITIATION	LRFP INTERIOR DESIGN	INITIATION	100	P	Y
CONCEPTUAL PLANNING	LRFP INTERIOR DESIGN	CONCEPTUAL PLANNING	120	P	Y
ASSIGN DESIGN ACCT	LRFP INTERIOR DESIGN	ASSIGN DESIGN ACCT	160	A	Y
DESIGN	LRFP INTERIOR DESIGN	DESIGN	230	A	Y
ESTIMATING	LRFP INTERIOR DESIGN	ESTIMATING	270	A	Y
ESTIMATE APPROVAL	LRFP INTERIOR DESIGN	ESTIMATE APPROVAL	280	A	Y
FUND PROJECT	LRFP INTERIOR DESIGN	FUND PROJECT	340	A	Y
PO	LRFP INTERIOR DESIGN	PO	360	A	Y
BIDDING	LRFP INTERIOR DESIGN	BIDDING	370	A	Y
CONSTRUCTION	LRFP INTERIOR DESIGN	CONSTRUCTION	390	A	Y
CONSTR CLOSEOUT	LRFP INTERIOR DESIGN	CONSTR CLOSEOUT	400	A	Y
FINANCIAL CLOSEOUT	LRFP INTERIOR DESIGN	FINANCIAL CLOSEOUT	420	A	Y
PROJECT CLOSEOUT	LRFP INTERIOR DESIGN	PROJECT CLOSEOUT	430	A	Y
CLOSED	LRFP INTERIOR DESIGN	CLOSED	900	L	Y
ON HOLD	LRFP INTERIOR DESIGN	ON HOLD	980	A	Y
DECLINED	LRFP INTERIOR DESIGN	DECLINED	990	L	Y
CANCELED	LRFP INTERIOR DESIGN	CANCELED	999	C	Y
INITIATION	STANDARD UTILITIES	INITIATION	100	P	Y
PM ASSIGNMENT	STANDARD UTILITIES	PM ASSIGNMENT	110	P	Y
CONCEPTUAL PLANNING	STANDARD UTILITIES	CONCEPTUAL PLANNING	120	P	Y
ASSIGN DESIGN ACCT	STANDARD UTILITIES	ASSIGN DESIGN ACCT	160	A	Y
PREDESIGN	STANDARD UTILITIES	PREDESIGN	190	A	Y



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CLIENT DESIGN APP	STANDARD UTILITIES	CLIENT DESIGN APP	200	A	Y
DESIGN	STANDARD UTILITIES	DESIGN	230	A	Y
DEVELOP SOW	STANDARD UTILITIES	DEVELOP SOW	240	A	Y
CONTRACT SETUP	STANDARD UTILITIES	CONTRACT SETUP	260	A	Y
ESTIMATING	STANDARD UTILITIES	ESTIMATING	270	A	Y
ESTIMATE APPROVAL	STANDARD UTILITIES	ESTIMATE APPROVAL	280	A	Y
FUND CONSTRUCTION	STANDARD UTILITIES	FUND CONSTRUCTION	350	A	Y
NTP	STANDARD UTILITIES	NTP	380	A	Y
CONSTRUCTION	STANDARD UTILITIES	CONSTRUCTION	390	A	Y
CONSTR CLOSEOUT	STANDARD UTILITIES	CONSTR CLOSEOUT	400	A	Y
FINANCIAL CLOSEOUT	STANDARD UTILITIES	FINANCIAL CLOSEOUT	420	A	Y
CLOSED	STANDARD UTILITIES	CLOSED	900	L	Y
ON HOLD	STANDARD UTILITIES	ON HOLD	980	A	Y
DECLINED	STANDARD UTILITIES	DECLINED	990	L	Y
CANCELED	STANDARD UTILITIES	CANCELED	999	C	Y

BUDGET REVISION REASONS

Reason	Description	Active
ADDITIONAL SVCS	ADDITIONAL SERVICES TO ORIGINAL CONTRACT	Y
DESIGN CHANGE	DESIGN CHANGE	Y
DEVELOPMENT	BUDGET DEVELOPMENT/REALLOCATION AMONG COMPONENTS	Y
OWNER REQUEST	OWNER REQUESTED	Y
REDUCE SVCS	REDUCTION OF SERVICES TO ORIGINAL CONTRACT	Y
REGULATORY REQ	REGULATORY REQUIREMENT	Y
UNFORESEEN COND	UNFORESEEN CONDITIONS	Y
WEATHER	WEATHER CONDITIONS	Y



BUDGET REVISION TYPES

Type	Description	Active
FMCS ABOVE BOR	FMCS ABOVE BOR	Y
FMCS ALLOCATION ADJ	FMCS ALLOCATION ADJ	Y
FMCS BUDGET DEV	FMCS BUDGET DEV	Y
LAND ABOVE BOR	LAND ABOVE BOR	Y
LAND ALLOCATION ADJ	LAND ALLOCATION ADJ	Y
LAND BUDGET DEV	LAND BUDGET DEV	Y
LRFP ALLOCATION ADJ	LRFP ALLOCATION ADJ	Y
LRFP BUDGET DEV	LRFP BUDGET DEV	Y
LRFP REQ BOR APPV	LRFP REQ BOR APPV	Y
UTIL ABOVE BOR	UTIL ABOVE BOR	Y
UTIL ALLOCATION ADJ	UTIL ALLOCATION ADJ	Y
UTIL BUDGET DEV	UTIL BUDGET DEV	Y

BUDGET REVISION STATUS CODES

Status	Description	Sequence	Status Flag	Active
REQUESTED	BUDGET REVISION REQUESTED	100	O	Y
UNDER REVIEW	BUDGET REVISION BEING REVIEWED BY OWNERS STAFF	200	O	Y
APPROVED	BUDGET REVISION APPROVED	300	F	Y
MANAGEMENT APPROVAL	MANAGEMENT APPROVAL	400	F	Y
MANAGEMENT APPROVED	MANAGEMENT APPROVED	500	A	Y
AWAIT BOR APPROVAL	AWAIT BOR APPROVAL	600	F	Y
BOR APPROVED	BOR APPROVED	700	A	Y
ON HOLD	ON HOLD. BUDGET REVISIONS ARE EDITABLE AND APPEAR ON THE BUDGET REVISION TRANSACTION LIST, BUT THEY DO NOT APPEAR ON THE CAPITAL PROJECT	800	O	Y
REJECTED	BUDGET REVISION REJECTED	900	R	Y
CANCELED	BUDGET REVISION CANCELED	999	C	Y

PROGRESS REPORT TYPES

Type	Description	Active
COMMISSIONING	COMMISSIONING PROGRESS REPORT	Y
CONSULTANT	CONSULTANT PROGRESS REPORT	Y
CONTRACTOR	CONTRACTOR PROGRESS REPORT	Y
PM REPORT	PROJECT MANAGER PROGRESS REPORT	Y



PROGRESS REPORT STATUS CODES

Status	Description	Sequence	Status Flag	Active
INITIATION	INITIATION	100	O	Y
FINALIZED	THE REPORT IS FINALIZED	200	F	Y
CLOSED	THE REPORT IS CLOSED	950	C	Y
CANCELED	THE REPORT IS CANCELED	999	L	Y

ISSUE PRIORITY

Priority	Description	Sequence	Active
HIGH	MAJOR PROJECT IMPACT	300	Y
LOW	MINOR PROJECT IMPACT	100	Y
MED	SIGNIFICANT PROJECT IMPACT	200	Y

ISSUE TYPES

Type	Description	Active
CMAR CONTING	CM AT RISK CONTINGENCY ISSUE	Y
INFO ONLY	INFORMATION ONLY ISSUE	Y
POT CONTR CHG	POTENTIAL AMENDMENT, CONSTRUCTION CHANGE ORDER, CONSTRUCTION CHANGE DIRECTIVE, OR CHANGE ORDER	Y

ISSUE STATUS CODES

Status	Description	Sequence	Status Flag	Active
INITIATION	INITIATE ISSUE	100	O	Y
PROPOSED	ISSUE IS PROPOSED	200	O	Y
PENDING	ISSUE IS PENDING	300	O	Y
APPROVED	ISSUE IS APPROVED	400	O	Y
CLOSED	ISSUE IS CLOSED	950	C	Y
REJECTED	ISSUE IS REJECTED	980	L	Y
CANCELED	ISSUE IS CANCELED	999	L	Y

MEETING MINUTES TYPE

Type	Description	Active
MEETING MINUTES	MEETING MINUTES	Y



MEETING MINUTES STATUS CODES

Status	Description	Sequence	Status Flag	Active
OPEN	OPEN	100	O	Y
CLOSED	CLOSED	900	C	Y

CAPITAL PROGRAM STATUS CODES/TYPES

Status	Type	Description	Sequence	Status Flag	Active
PENDING	INFRASTRUCTURE	PENDING	100	P	Y
ACTIVE	INFRASTRUCTURE	ACTIVE	200	A	Y

UNIVERSAL ACTION LIST STATUS CODES

Status	Description	Sequence	Status Flag	Active
INITIATION	INITIATION	100	O	Y
UNDER REVIEW	UNDER REVIEW	200	O	Y
SUBMITTED TO A/E	SUBMITTED TO A/E	300	C	Y
PM CORRECTIONS	PM CORRECTIONS	400	O	Y
FIRE MARSHALL REVIEW	FIRE MARSHALL REVIEW	500	O	Y
ISSUED PARTIAL	ISSUED PARTIAL	600	O	Y
FULL OCCUPANCY REQ	FULL OCCUPANCY REQ	700	O	Y
ISSUED FULL	ISSUED FULL	900	C	Y
ISSUED	ISSUED	910	C	Y
DENIED	DENIED	920	C	Y
CANCELED	CANCELED	999	L	Y

UNIVERSAL ACTION LIST TYPES

Type	Description	Active
BUILDING PERMIT	BUILDING PERMIT	Y
DESIGN REVIEW	DESIGN REVIEW	Y
OCCUPANCY	OCCUPANCY	Y



CONTRACT ADMINISTRATION MODUE CONFIGURATION AND SETUP

CHANGE ORDER REASON

Reason	Description
CHANGE IN SCOPE	INCREASE OR REDUCTION IN SCOPE OF PROJECT
DESIGN CHANGE	DESIGN CHANGE
MARKET CHANGE	CHANGE IN MARKET THAT INCREASED/DECREASED MATERIAL COSTS
OWNER REQUEST	OWNER REQUESTED
REGULATORY REQ	REGULATORY REQUIREMENT
UNFORESEEN COND	UNFORESEEN CONDITIONS
WEATHER	INCLEMENT WEATHER/DISASTER

AMENDMENT REASON

Reason	Description
CHANGE IN SVCS	INCREASE OR REDUCTION IN SERVICES TO ORIGINAL CONTRACT
DESIGN CHANGE	DESIGN CHANGE
OWNER REQUEST	OWNER REQUEST RESULTING IN ADDITIONAL TIME AND/OR MONEY
REGULATORY REQ	REGULATORY REQUIREMENT
UNFORESEEN COND	UNFORESEEN CONDITIONS

AMENDMENT STATUS

Status	Description	Sequence	Status Flag
OPEN	CONSULTANT AMENDMENT OPEN	100	Open
LRFP UNDER REVIEW	CONSULTANT AMENDMENT UNDER REVIEW BY LRFP	200	Open
FMCS UNDER REVIEW	CONSULTANT AMENDMENT UNDER REVIEW BY FMCS	210	Open
LAND UNDER REVIEW	CONSULTANT AMENDMENT UNDER REVIEW BY LANDSCAPE SERVICES	220	Open
UTIL UNDER REVIEW	CONSULTANT AMENDMENT UNDER REVIEW BY UTILITIES	230	Open
LRFP APPROVED	CONSULTANT AMENDMENT APPROVED	300	Open
FM APPROVED	CONSULTANT AMENDMENT APPROVED	310	Open
PROCESSED	CONSULTANT AMENDMENT HAS BEEN PROCESSED IN OKCORRAL	400	Approved
DENIED	CONSULTANT AMENDMENT DENIED	990	Canceled
CANCELED	CONSULTANT AMENDMENT CANCELED	999	Canceled



CONSULTANT CONTRACT TYPE

Type	Description
LRFP	LRFP
ON-CALL FMCS	ON-CALL FMCS
ON-CALL LANDSCP	ON-CALL LANDSCAPE
ON-CALL LRFP	ON-CALL LRFP
ON-CALL UTIL	ON-CALL UTILITIES
UTILITIES	UTILITIES

CONSULTANT CONTRACT STATUS

Type	Status	Description	Sequence	Status Flag
LRFP	REQUESTED	REQUESTED	100	Open
LRFP	REQUEST PROPOSAL	REQUEST PROPOSAL	200	Open
LRFP	AWAIT PROPOSAL	AWAIT PROPOSAL	300	Open
LRFP	UNDER REVIEW	UNDER REVIEW	400	Open
LRFP	GENERATE CONTRACT	GENERATE CONTRACT	500	Open
LRFP	REVIEW CONTRACT	REVIEW CONTRACT	600	Open
LRFP	LEGAL REVIEW	LEGAL REVIEW	700	Open
LRFP	LEGAL APPROVED	LEGAL APPROVED	800	Open
LRFP	AWAIT CONSULT SIG	AWAIT CONSULT SIG	900	Open
LRFP	MARKUP REVIEW	MARKUP REVIEW	1000	Open
LRFP	EXECUTE CONTRACT	EXECUTE CONTRACT	1100	Open
LRFP	AWAITING PO	AWAITING PO	1200	Open
LRFP	AWARDED	AWARDED	1300	Awarded
LRFP	ON HOLD	ON HOLD	1400	Open
LRFP	COMPLETED	COMPLETED	1950	Closed
LRFP	CANCELED	CANCELED	1999	Canceled
ON-CALL FMCS	REQUESTED	REQUESTED	100	Open
ON-CALL FMCS	REVIEW PROPOSAL	REVIEW PROPOSAL	210	Open
ON-CALL FMCS	GENERATE TO	GENERATE TO	310	Open
ON-CALL FMCS	REVIEW TO	REVIEW TO	410	Open
ON-CALL FMCS	AWAIT CONSULT SIG	AWAIT CONSULT SIG	900	Open
ON-CALL FMCS	EXECUTE TO	EXECUTE TO	1010	Open
ON-CALL FMCS	AWAITING PO	AWAITING PO	1200	Open
ON-CALL FMCS	AWARDED	AWARDED	1300	Awarded
ON-CALL FMCS	ON HOLD	ON HOLD	1400	Open
ON-CALL FMCS	COMPLETED	COMPLETED	1950	Closed
ON-CALL FMCS	CANCELED	CANCELED	1999	Canceled
ON-CALL LANDSCP	REQUESTED	REQUESTED	100	Open



AiM™ CPPM Standard Operation Procedures

Type	Status	Description	Sequence	Status Flag
ON-CALL LANDSCP	REVIEW PROPOSAL	REVIEW PROPOSAL	210	Open
ON-CALL LANDSCP	GENERATE TO	GENERATE TO	310	Open
ON-CALL LANDSCP	REVIEW TO	REVIEW TO	410	Open
ON-CALL LANDSCP	AWAIT CONSULT SIG	AWAIT CONSULT SIG	900	Open
ON-CALL LANDSCP	EXECUTE TO	EXECUTE TO	1010	Open
ON-CALL LANDSCP	AWAITING PO	AWAITING PO	1200	Open
ON-CALL LANDSCP	AWARDED	AWARDED	1300	Awarded
ON-CALL LANDSCP	ON HOLD	ON HOLD	1400	Open
ON-CALL LANDSCP	COMPLETED	COMPLETED	1950	Closed
ON-CALL LANDSCP	CANCELED	CANCELED	1999	Canceled
ON-CALL LRFP	REQUEST PROPOSAL	REQUEST PROPOSAL	200	Open
ON-CALL LRFP	REVIEW PROPOSAL	REVIEW PROPOSAL	210	Open
ON-CALL LRFP	GENERATE TO	GENERATE TO	310	Open
ON-CALL LRFP	REVIEW TO	REVIEW TO	410	Open
ON-CALL LRFP	AWAIT CONSULT SIG	AWAIT CONSULT SIG	900	Open
ON-CALL LRFP	EXECUTE TO	EXECUTE TO	1010	Open
ON-CALL LRFP	AWAITING PO	AWAITING PO	1200	Open
ON-CALL LRFP	AWARDED	AWARDED	1300	Awarded
ON-CALL LRFP	ON HOLD	ON HOLD	1400	Open
ON-CALL LRFP	COMPLETED	COMPLETED	1950	Closed
ON-CALL LRFP	CANCELED	CANCELED	1999	Canceled
ON-CALL UTIL	REQUEST PROPOSAL	REQUEST PROPOSAL	200	Open
ON-CALL UTIL	REVIEW PROPOSAL	REVIEW PROPOSAL	210	Open
ON-CALL UTIL	GENERATE TO	GENERATE TO	310	Open
ON-CALL UTIL	REVIEW TO	REVIEW TO	410	Open
ON-CALL UTIL	AWAIT CONSULT SIG	AWAIT CONSULT SIG	900	Open
ON-CALL UTIL	EXECUTE TO	EXECUTE TO	1010	Open
ON-CALL UTIL	AWAITING PO	AWAITING PO	1200	Open
ON-CALL UTIL	AWARDED	AWARDED	1300	Awarded
ON-CALL UTIL	ON HOLD	ON HOLD	1400	Open
ON-CALL UTIL	COMPLETED	COMPLETED	1950	Closed
ON-CALL UTIL	CANCELED	CANCELED	1999	Canceled
UTILITIES	REQUESTED	REQUESTED	100	Open
UTILITIES	REQUEST PROPOSAL	REQUEST PROPOSAL	200	Open
UTILITIES	AWAIT PROPOSAL	AWAIT PROPOSAL	300	Open
UTILITIES	UNDER REVIEW	UNDER REVIEW	400	Open
UTILITIES	GENERATE CONTRACT	GENERATE CONTRACT	500	Open
UTILITIES	REVIEW CONTRACT	REVIEW CONTRACT	600	Open
UTILITIES	LEGAL REVIEW	LEGAL REVIEW	700	Open
UTILITIES	LEGAL APPROVED	LEGAL APPROVED	800	Open
UTILITIES	AWAIT CONSULT SIG	AWAIT CONSULT SIG	900	Open



AiM™ CPPM Standard Operation Procedures

Type	Status	Description	Sequence	Status Flag
UTILITIES	MARKUP REVIEW	MARKUP REVIEW	1000	Open
UTILITIES	EXECUTE CONTRACT	EXECUTE CONTRACT	1100	Open
UTILITIES	AWAITING PO	AWAITING PO	1200	Open
UTILITIES	AWARDED	AWARDED	1300	Awarded
UTILITIES	ON HOLD	ON HOLD	1400	Open
UTILITIES	COMPLETED	COMPLETED	1950	Closed
UTILITIES	CANCELED	CANCELED	1999	Canceled

CONSULTANT CONTRACT LINE GROUP

Line Group	Description
FEES	FEES
REIMBURSABLES	REIMBURSABLES

CONSTRUCTION CONTRACT TYPE

Type	Description	End Date Logic
AS NEEDED	AS NEEDED	End Date Editable
CMAR LRFP	CMAR LRFP	End Date Editable
CMAR UTILITY	CMAR UTILITY	End Date Editable
ENERGY SPC	ENERGY SPC	End Date Editable
FM LOW BID	FM LOW BID	End Date Editable
LRFP HARD BID	LRFP HARD BID	End Date Editable
OCCM	OCCM	End Date Editable

CONSTRUCTION CONTRACT STATUS

Type	Status	Description	Sequence	Status Flag
AS NEEDED	REQUESTED	REQUESTED	100	Open
AS NEEDED	GENERATE TO	GENERATE TO	510	Open
AS NEEDED	REVIEW TO	REVIEW TO	610	Open
AS NEEDED	AWAIT CONTRACTOR SIG	AWAIT CONTRACTOR SIG	900	Open
AS NEEDED	EXECUTE TO	EXECUTE TO	1110	Open
AS NEEDED	AWAITING PO	AWAITING PO	1200	Open
AS NEEDED	AWARDED	AWARDED	1300	Awarded
AS NEEDED	NTP	NTP	1400	Notice to Proceed
AS NEEDED	ON HOLD	ON HOLD	1900	Open
AS NEEDED	COMPLETED	COMPLETED	1950	Closed
AS NEEDED	CANCELED	CANCELED	1999	Canceled
CMAR LRFP	REQUESTED	REQUESTED	100	Open



AiM™ CPPM Standard Operation Procedures

Type	Status	Description	Sequence	Status Flag
CMAR LRF	REQUEST PROPOSAL	REQUEST PROPOSAL	200	Open
CMAR LRF	AWAIT PROPOSAL	AWAIT PROPOSAL	300	Open
CMAR LRF	UNDER REVIEW	UNDER REVIEW	400	Open
CMAR LRF	GENERATE CONTRACT	GENERATE CONTRACT	500	Open
CMAR LRF	REVIEW CONTRACT	REVIEW CONTRACT	600	Open
CMAR LRF	LEGAL REVIEW	LEGAL REVIEW	700	Open
CMAR LRF	LEGAL APPROVED	LEGAL APPROVED	800	Open
CMAR LRF	AWAIT CONTRACTOR SIG	AWAIT CONTRACTOR SIG	900	Open
CMAR LRF	MARKUP REVIEW	MARKUP REVIEW	1000	Open
CMAR LRF	EXECUTE CONTRACT	EXECUTE CONTRACT	1100	Open
CMAR LRF	AWAITING PO	AWAITING PO	1200	Open
CMAR LRF	AWARDED	AWARDED	1300	Awarded
CMAR LRF	NTP	NTP	1400	Notice to Proceed
CMAR LRF	ON HOLD	ON HOLD	1900	Open
CMAR LRF	COMPLETED	COMPLETED	1950	Closed
CMAR LRF	CANCELED	CANCELED	1999	Canceled
CMAR UTILITY	REQUESTED	REQUESTED	100	Open
CMAR UTILITY	REQUEST PROPOSAL	REQUEST PROPOSAL	200	Open
CMAR UTILITY	AWAIT PROPOSAL	AWAIT PROPOSAL	300	Open
CMAR UTILITY	UNDER REVIEW	UNDER REVIEW	400	Open
CMAR UTILITY	GENERATE CONTRACT	GENERATE CONTRACT	500	Open
CMAR UTILITY	REVIEW CONTRACT	REVIEW CONTRACT	600	Open
CMAR UTILITY	LEGAL REVIEW	LEGAL REVIEW	700	Open
CMAR UTILITY	LEGAL APPROVED	LEGAL APPROVED	800	Open
CMAR UTILITY	AWAIT CONTRACTOR SIG	AWAIT CONTRACTOR SIG	900	Open
CMAR UTILITY	MARKUP REVIEW	MARKUP REVIEW	1000	Open
CMAR UTILITY	EXECUTE CONTRACT	EXECUTE CONTRACT	1100	Open
CMAR UTILITY	AWAITING PO	AWAITING PO	1200	Open
CMAR UTILITY	AWARDED	AWARDED	1300	Awarded



AiM™ CPPM Standard Operation Procedures

Type	Status	Description	Sequence	Status Flag
CMAR UTILITY	NTP	NTP	1400	Notice to Proceed
CMAR UTILITY	ON HOLD	ON HOLD	1900	Open
CMAR UTILITY	COMPLETED	COMPLETED	1950	Closed
CMAR UTILITY	CANCELED	CANCELED	1999	Canceled
ENERGY SPC	REQUESTED	REQUESTED	100	Open
ENERGY SPC	DEVELOP FIM	DEVELOP FIM	220	Open
ENERGY SPC	FIM REVIEW	FIM REVIEW	330	Open
ENERGY SPC	FIM APPROVAL	FIM APPROVAL	410	Open
ENERGY SPC	GENERATE CONTRACT	GENERATE CONTRACT	500	Open
ENERGY SPC	REVIEW CONTRACT	REVIEW CONTRACT	600	Open
ENERGY SPC	LEGAL REVIEW	LEGAL REVIEW	700	Open
ENERGY SPC	LEGAL APPROVED	LEGAL APPROVED	800	Open
ENERGY SPC	AWAIT CONTRACTOR SIG	AWAIT CONTRACTOR SIG	900	Open
ENERGY SPC	MARKUP REVIEW	MARKUP REVIEW	1000	Open
ENERGY SPC	EXECUTE CONTRACT	EXECUTE CONTRACT	1100	Open
ENERGY SPC	AWAITING PO	AWAITING PO	1200	Awarded
ENERGY SPC	AWARDED	AWARDED	1300	Awarded
ENERGY SPC	NTP	NTP	1400	Notice to Proceed
ENERGY SPC	M&V BASELINE	M&V BASELINE	1500	Notice to Proceed
ENERGY SPC	M&V PERIOD	M&V	1600	Notice to Proceed
ENERGY SPC	ON HOLD	ON HOLD	1900	Open
ENERGY SPC	COMPLETED	COMPLETED	1950	Closed
ENERGY SPC	CANCELED	CANCELED	1999	Canceled
FM LOW BID	REQUESTED	REQUESTED	100	Open
FM LOW BID	READY TO ADVERTISE	READY TO ADVERTISE	210	Open
FM LOW BID	ADVERTISE	ADVERTISE	310	Open
FM LOW BID	BID OPENING	BID OPENING	320	Open
FM LOW BID	UNDER REVIEW	UNDER REVIEW	400	Open
FM LOW BID	AWAIT CONTRACTOR SIG	AWAIT CONTRACTOR SIG	900	Open
FM LOW BID	AWAITING PO	AWAITING PO	1200	Open
FM LOW BID	AWARDED	AWARDED	1300	Awarded
FM LOW BID	NTP	NTP	1400	Notice to Proceed
FM LOW BID	ON HOLD	ON HOLD	1900	Open
FM LOW BID	COMPLETED	COMPLETED	1950	Closed



AiM™ CPPM Standard Operation Procedures

Type	Status	Description	Sequence	Status Flag
FM LOW BID	CANCELED	CANCELED	1999	Canceled
LRFP HARD BID	REQUESTED	REQUESTED	100	Open
LRFP HARD BID	READY TO ADVERTISE	READY TO ADVERTISE	210	Open
LRFP HARD BID	ADVERTISE	ADVERTISE	310	Open
LRFP HARD BID	BID OPENING	BID OPENING	320	Open
LRFP HARD BID	UNDER REVIEW	UNDER REVIEW	400	Open
LRFP HARD BID	GENERATE CONTRACT	GENERATE CONTRACT	500	Open
LRFP HARD BID	REVIEW CONTRACT	REVIEW CONTRACT	600	Open
LRFP HARD BID	LEGAL REVIEW	LEGAL REVIEW	700	Open
LRFP HARD BID	LEGAL APPROVED	LEGAL APPROVED	800	Open
LRFP HARD BID	AWAIT CONTRACTOR SIG	AWAIT CONTRACTOR SIG	900	Open
LRFP HARD BID	MARKUP REVIEW	MARKUP REVIEW	1000	Open
LRFP HARD BID	EXECUTE CONTRACT	EXECUTE CONTRACT	1100	Open
LRFP HARD BID	AWAITING PO	AWAITING PO	1200	Open
LRFP HARD BID	AWARDED	AWARDED	1300	Awarded
LRFP HARD BID	NTP	NTP	1400	Notice to Proceed
LRFP HARD BID	ON HOLD	ON HOLD	1900	Open
LRFP HARD BID	COMPLETED	COMPLETED	1950	Closed
LRFP HARD BID	CANCELED	CANCELED	1999	Canceled
OCCM	REQUESTED	REQUESTED	100	Open
OCCM	GENERATE TO	GENERATE TO	510	Open
OCCM	REVIEW TO	REVIEW TO	610	Open
OCCM	AWAIT CONTRACTOR SIG	AWAIT CONTRACTOR SIG	900	Open
OCCM	EXECUTE TO	EXECUTE TO	1110	Open
OCCM	AWAITING PO	AWAITING PO	1200	Open
OCCM	AWARDED	AWARDED	1300	Awarded



AiM™ CPPM Standard Operation Procedures

Type	Status	Description	Sequence	Status Flag
OCCM	NTP	NTP	1400	Notice to Proceed
OCCM	ON HOLD	ON HOLD	1900	Open
OCCM	COMPLETED	COMPLETED	1950	Closed
OCCM	CANCELED	CANCELED	1999	Canceled

CONSTRUCTION CONTRACT LINE GROUP

Line Group	Description
CONTINGENCY	CONTINGENCY
COST OF WORK	COST OF WORK
DIRECT SUPPORT	DIRECT SUPPORT
FEE	FEE
PRECON	PRECON

CONSTRUCTION CHANGE ORDER STATUS

Status	Description	Sequence	Status Flag
OPEN	CONSTRUCTION CHANGE ORDER STATUS OPEN	100	Open
LRFP UNDER REVIEW	LRFP CHANGE ORDER UNDER REVIEW	200	Open
FMCS UNDER REVIEW	FMCS CHANGE ORDER UNDER REVIEW	210	Open
LAND UNDER REVIEW	LANDSCAPE CHANGE ORDER UNDER REVIEW	220	Open
UTIL UNDER REVIEW	UTILITIES CHANGE ORDER UNDER REVIEW	230	Open
FMCS PEND APPROVAL	FMCS CHANGE ORDER DECISION TO GO TO BOARD APPROVAL OR NOT	300	Open
LAND PEND APPROVAL	LANDSCAPE CHANGE ORDER DECISION TO GO TO BOARD APPROVAL OR NOT	310	Open
UTIL PEND APPROVAL	UTILITIES CHANGE ORDER DECISION TO GO TO BOARD APPROVAL OR NOT	320	Open
BOR APPROVAL	BOARD APPROVAL BY LRFP DIRECTOR FOR CHANGE ORDERS	400	Open
LRFP APPROVED	LRFP CHANGE ORDER APPROVED	500	Open
FM APPROVED	ALL FACILITIES MANAGEMENT CHANGE ORDERS APPROVED	510	Open
PROCESSED	CHANGE ORDER PROCESSED	600	Approved
DENIED	CHANGE ORDER DENIED	900	Canceled
CANCELED	CHANGE ORDER CANCELED	999	Canceled



CONSTRUCTION CHANGE DIRECTIVE TYPE

Type	Description
FMCS	FMCS
LANDSCAPE	LANDSCAPE
LRFP	LRFP
UTILITIES	UTILITIES

CONSTRUCTION CHANGE DIRECTIVE STATUS

Status	Description	Sequence	Status Flag
OPEN	CONSTRUCTION CHANGE PROPOSAL STATUS OPEN	100	Open
UNDER REVIEW	CONSTRUCTION CHANGE PROPOSAL STATUS UNDER REVIEW	200	Finalized
APPROVED	CONSTRUCTION CHANGE PROPOSAL STATUS APPROVED	300	Finalized
PROCESSED	PROCESSED	400	Processed
DENIED	CONSTRUCTION CHANGE PROPOSAL STATUS DENIED	900	Processed
CANCELED	CONSTRUCTION CHANGE PROPOSAL STATUS CANCELED	999	Canceled

CONSTRUCTION CHANGE PROPOSAL TYPE

Type	Description
FMCS	FMCS
LANDSCAPE	LANDSCAPE
LRFP	LRFP
UTILITIES	UTILITIES

CONSTRUCTION CHANGE PROPOSAL STATUS

Status	Description	Sequence	Status Flag
OPEN	CONSTRUCTION CHANGE PROPOSAL STATUS OPEN	100	Open
UNDER REVIEW	CONSTRUCTION CHANGE PROPOSAL STATUS UNDER REVIEW	200	Finalized
APPROVED	CONSTRUCTION CHANGE PROPOSAL STATUS APPROVED	300	Finalized
PROCESSED	PROCESSED	400	Processed
DENIED	CONSTRUCTION CHANGE PROPOSAL STATUS DENIED	900	Processed
CANCELED	CONSTRUCTION CHANGE PROPOSAL STATUS CANCELED	999	Canceled

RFI TYPE

Type	Description
RFI	REQUEST FOR INFORMATION



RFI STATUS

Status	Description	Sequence	Status Flag
OPEN	OPEN	100	Open
SUBMITTED	SUBMITTED	200	Submitted
CANCELED	CANCELED	300	Canceled
CLOSED	CLOSED	400	Closed

ASI TYPE

Type	Description
CHANGED COND	CHANGED CONDITIONS
OWNER INIT	OWNER INITIATED REQUEST
REVIEWER INIT	REVIEWING AGENCY INITIATED REQUEST
SUBSTITUTION	SUBSTITUTION
VALUE ENG	VALUE ENGINEERING

ASI STATUS

Status	Description	Sequence	Status Flag
OPEN	ARCHITECT SUPPLEMENTAL INSTRUCTIONS STATUS OPEN	100	Open
SUBMITTED	ARCHITECT SUPPLEMENTAL INSTRUCTIONS STATUS SUBMITTED	200	Submitted
CANCELED	ARCHITECT SUPPLEMENTAL INSTRUCTIONS STATUS CANCELED	300	Canceled

SUBMITTAL TYPE

Type	Description
01 GENERAL REQ	DIVISION 01 00 00 GENERAL REQUIREMENTS
03 CONCRETE	DIVISION 03 00 00 CONCRETE
04 MASONRY	DIVISION 04 00 00 MASONRY
05 METALS	DIVISION 05 00 00 METALS
06 WD/PLAS/COMP	DIVISION 06 00 00 WOOD, PLASTICS AND COMPOSITES
07 THERM/MOIST	DIVISION 07 00 00 THERMAL AND MOISTURE PROTECTION
08 OPENINGS	DIVISION 08 00 00 OPENINGS
09 FINISHES	DIVISION 09 00 00 FINISHES
10 SPECIALTIES	DIVISION 10 00 00 SPECIALTIES
11 EQUIPMENT	DIVISION 11 00 00 EQUIPMENT
13 SPECIAL CONS	DIVISION 13 00 00 SPECIAL CONSTRUCTION
14 CONVEYING	DIVISION 14 00 00 CONVEYING EQUIPMENT
21 FIRE SUP	DIVISION 21 00 00 FIRE SUPPRESSION



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Type	Description
22 PLUMBING	DIVISION 22 00 00 PLUMBING
23 HVAC	DIVISION 23 00 00 HEATING, VENTILATING, AND AIR-CONDITIONING
26 ELECTRICAL	DIVISION 26 00 00 ELECTRICAL
31 EARTHWORK	DIVISION 31 00 00 EARTHWORK
32 EXT IMPROV	DIVISION 32 00 00 EXTERIOR IMPROVEMENTS
33 UTILITIES	DIVISION 33 00 00 UTILITIES
40 PROC INTEG	DIVISION 40 00 00 PROCESS INTEGRATION

SUBMITTAL STATUS

Status	Description	Sequence	Status Flag
SUBMITTED	SUBMITTAL STATUS REQUESTED	100	Open
UNDER REVIEW	SUBMITTAL UNDER REVIEW	200	Finalized
REVISE AND RESUBMIT	REVISE AND RESUBMIT	300	Finalized
APPROVED	SUBMITTAL WAS APPROVED	400	Approved
REJECTED	SUBMITTAL REJECTED	500	Approved
CANCELED	SUBMITTAL STATUS CANCELED	999	Canceled

COMMISSIONING PLAN TYPE

Type	Description
CONSTRUCTION	CONSTRUCTION PHASE COMMISSIONING
DESIGN	DESIGN PHASE COMMISSIONING

COMMISSIONING PLAN STATUS

Status	Type	Description	Sequence	Status Flag
OPEN	DESIGN	OPEN	100	Open
CLOSED	DESIGN	CLOSED	900	Closed
OPEN	CONSTRUCTION	OPEN	100	Open
CLOSED	CONSTRUCTION	CLOSED	900	Closed

COMMISSIONING PLAN LINE STATUS

Status	Description	Sequence	Status Flag
OPEN	OPEN	100	Open
CLOSED	CLOSED	950	Closed

PUNCH LIST STATUS

Status	Description	Sequence	Status Flag
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AiM™ CPPM Standard Operation Procedures

OPEN	OPEN	100	Open
CLOSED	CLOSED	950	Closed

PUNCH LIST LINE STATUS

Status	Description	Sequence	Status Flag
OPEN	OPEN	100	Open
CLOSED	CLOSED	950	Closed

INTERNAL WORK AGREEMENT TYPE

Type	Description
EHS	ENVIRONMENTAL HEALTH AND SAFETY
FM ASBESTOS	FM ASBESTOS
FM ELECT DIST	FACILITIES MANAGEMENT ELECTRICAL DISTRIBUTION
FM IN HOUSE	FACILITIES MANAGEMENT IN HOUSE CONSTRUCTION
FM LANDSCAPING	FACILITIES MANAGEMENT LANDSCAPING
FM MEP	FACILITIES MANAGEMENT MEP TRADES
FM STRUCTURAL	FACILITIES MANAGEMENT STRUCTURAL TRADES
FM SUPPORT SHOP	FACILITIES MANAGEMENT FACILITY SUPPORT SHOPS
FM UTIL DIST	FACILITIES MANAGEMENT UTILITIES DISTRIBUTION
IT	TELECOMMUNICATIONS
LRFP	LONG RANGE FACILITIES PLANNING
LRFP ARCH	LRFP ARCHITECTURE
LRFP INT DESIGN	LRFP INTERIOR DESIGN

INTERNAL WORK AGREEMENT STATUS

Type	Status	Description	Sequence	Status Flag
EHS	REQUESTED	REQUESTED	100	Open
EHS	UNDER REVIEW	UNDER REVIEW	200	Open
EHS	APPROVED	APPROVED	300	Open
EHS	NTP	NTP	400	Approved
EHS	COMPLETED	COMPLETED	900	Closed
EHS	ON HOLD	ON HOLD	950	Open
EHS	CANCELED	CANCELED	999	Canceled
FM ASBESTOS	REQUESTED	REQUESTED	100	Open
FM ASBESTOS	UNDER REVIEW	UNDER REVIEW	200	Open
FM ASBESTOS	APPROVED	APPROVED	300	Open
FM ASBESTOS	NTP	NTP	400	Approved
FM ASBESTOS	COMPLETED	COMPLETED	900	Closed
FM ASBESTOS	ON HOLD	ON HOLD	950	Open



AiM™ CPPM Standard Operation Procedures

Type	Status	Description	Sequence	Status Flag
FM ASBESTOS	CANCELED	CANCELED	999	Canceled
FM ELECT DIST	REQUESTED	REQUESTED	100	Open
FM ELECT DIST	UNDER REVIEW	UNDER REVIEW	200	Open
FM ELECT DIST	APPROVED	APPROVED	300	Open
FM ELECT DIST	NTP	NTP	400	Approved
FM ELECT DIST	COMPLETED	COMPLETED	900	Closed
FM ELECT DIST	ON HOLD	ON HOLD	950	Open
FM ELECT DIST	CANCELED	CANCELED	999	Canceled
FM IN HOUSE	REQUESTED	REQUESTED	100	Open
FM IN HOUSE	UNDER REVIEW	UNDER REVIEW	200	Open
FM IN HOUSE	APPROVED	APPROVED	300	Open
FM IN HOUSE	NTP	NTP	400	Approved
FM IN HOUSE	COMPLETED	COMPLETED	900	Closed
FM IN HOUSE	ON HOLD	ON HOLD	950	Open
FM IN HOUSE	CANCELED	CANCELED	999	Canceled
FM LANDSCAPING	REQUESTED	REQUESTED	100	Open
FM LANDSCAPING	UNDER REVIEW	UNDER REVIEW	200	Open
FM LANDSCAPING	APPROVED	APPROVED	300	Open
FM LANDSCAPING	NTP	NTP	400	Approved
FM LANDSCAPING	COMPLETED	COMPLETED	900	Closed
FM LANDSCAPING	ON HOLD	ON HOLD	950	Open
FM LANDSCAPING	CANCELED	CANCELED	999	Canceled
FM MEP	REQUESTED	REQUESTED	100	Open
FM MEP	UNDER REVIEW	UNDER REVIEW	200	Open
FM MEP	APPROVED	APPROVED	300	Open
FM MEP	NTP	NTP	400	Approved
FM MEP	COMPLETED	COMPLETED	900	Closed
FM MEP	ON HOLD	ON HOLD	950	Open
FM MEP	CANCELED	CANCELED	999	Canceled
FM STRUCTURAL	REQUESTED	REQUESTED	100	Open
FM STRUCTURAL	UNDER REVIEW	UNDER REVIEW	200	Open
FM STRUCTURAL	APPROVED	APPROVED	300	Open
FM STRUCTURAL	NTP	NTP	400	Approved
FM STRUCTURAL	COMPLETED	COMPLETED	900	Closed
FM STRUCTURAL	ON HOLD	ON HOLD	950	Open
FM STRUCTURAL	CANCELED	CANCELED	999	Canceled
FM SUPPORT SHOP	REQUESTED	REQUESTED	100	Open
FM SUPPORT SHOP	UNDER REVIEW	UNDER REVIEW	200	Open
FM SUPPORT SHOP	APPROVED	APPROVED	300	Open
FM SUPPORT SHOP	NTP	NTP	400	Approved
FM SUPPORT SHOP	COMPLETED	COMPLETED	900	Closed



AiM™ CPPM Standard Operation Procedures

Type	Status	Description	Sequence	Status Flag
FM SUPPORT SHOP	ON HOLD	ON HOLD	950	Open
FM SUPPORT SHOP	CANCELED	CANCELED	999	Canceled
FM UTIL DIST	REQUESTED	REQUESTED	100	Open
FM UTIL DIST	UNDER REVIEW	UNDER REVIEW	200	Open
FM UTIL DIST	APPROVED	APPROVED	300	Open
FM UTIL DIST	NTP	NTP	400	Approved
FM UTIL DIST	COMPLETED	COMPLETED	900	Closed
FM UTIL DIST	ON HOLD	ON HOLD	950	Open
FM UTIL DIST	CANCELED	CANCELED	999	Canceled
IT	REQUESTED	REQUESTED	100	Open
IT	UNDER REVIEW	UNDER REVIEW	200	Open
IT	APPROVED	APPROVED	300	Open
IT	NTP	NTP	400	Approved
IT	COMPLETED	COMPLETED	900	Closed
IT	ON HOLD	ON HOLD	950	Open
IT	CANCELED	CANCELED	999	Canceled
LRFP	REQUESTED	REQUESTED	100	Open
LRFP	UNDER REVIEW	UNDER REVIEW	200	Open
LRFP	ESTIMATING	ESTIMATING	225	Open
LRFP	ESTIMATE APPROVAL	ESTIMATE APPROVAL	250	Open
LRFP	APPROVED	APPROVED	300	Open
LRFP	NTP	NTP	400	Approved
LRFP	COMPLETED	COMPLETED	900	Closed
LRFP	ON HOLD	ON HOLD	950	Open
LRFP	CANCELED	CANCELED	999	Canceled
LRFP ARCH	REQUESTED	REQUESTED	100	Open
LRFP ARCH	UNDER REVIEW	UNDER REVIEW	200	Open
LRFP ARCH	ESTIMATING	ESTIMATING	225	Open
LRFP ARCH	ESTIMATE APPROVAL	ESTIMATE APPROVAL	250	Open
LRFP ARCH	APPROVED	APPROVED	300	Open
LRFP ARCH	NTP	NTP	400	Approved
LRFP ARCH	COMPLETED	COMPLETED	900	Closed
LRFP ARCH	ON HOLD	ON HOLD	950	Open
LRFP ARCH	CANCELED	CANCELED	999	Canceled
LRFP INT DESIGN	REQUESTED	REQUESTED	100	Open
LRFP INT DESIGN	UNDER REVIEW	UNDER REVIEW	200	Open
LRFP INT DESIGN	ESTIMATING	ESTIMATE APPROVAL	225	Open
LRFP INT DESIGN	ESTIMATE APPROVAL	ESTIMATE APPROVAL	250	Open



AiM™ CPPM Standard Operation Procedures

Type	Status	Description	Sequence	Status Flag
LRFP INT DESIGN	APPROVED	APPROVED	300	Open
LRFP INT DESIGN	NTP	NTP	400	Approved
LRFP INT DESIGN	COMPLETED	COMPLETED	900	Closed
LRFP INT DESIGN	ON HOLD	ON HOLD	950	Open
LRFP INT DESIGN	CANCELED	CANCELED	999	Canceled

INTERNAL WORK AMENDMENT STATUS

Status	Description	Sequence	Status Flag
REQUESTED	REQUESTED	100	Open
FMCS REVIEW	FM CONSTRUCTION SERVICES REVIEW	200	Open
CT MEP REVIEW	FM CENTRAL MEP REVIEW	210	Open
CT STRUCTURAL REVIEW	FM CENTRAL STRUCTURAL REVIEW	220	Open
SUPPORT SHOPS REVIEW	FM SUPPORT SHOPS REVIEW	230	Open
LANDSCAPE REVIEW	FM LANDSCAPE REVIEW	240	Open
UTILITIES REVIEW	FM UTILITIES REVIEW	250	Open
ASBESTOS REVIEW	FM ASBESTOS REVIEW	260	Open
EHS REVIEW	EHS REVIEW	270	Open
LRFP REVIEW	LRFP REVIEW	280	Open
IT REVIEW	IT REVIEW	290	Open
PM APPROVAL	PM APPROVAL	300	Open
APPROVED	APPROVED	400	Approved
CANCELED	APPROVED	999	Canceled



FINANCE MODULE CONFIGURATION AND SETUP

DIRECT EXPENSE TYPES

Expense Type	Description	Default	Timesheet	Active
LRFP COMMISSIONING	LRFP COMMISSIONING	N	N	Y
LRFP FF&E CONSULT	LRFP FF&E CONSULTANT	N	N	Y
LRFP PRJ ADMIN FEE	LRFP PROJECT ADMIN FEE	N	N	Y
LRFP REIMBURSABLE	LRFP (REIMBURSABLE)	N	N	Y

DIRECT EXPENSE STATUS CODES

Status	Description	Sequence	Status Flag	Active
OPEN	OPEN	100	O	Y
APPROVED	DIRECT EXPENSE STATUS APPROVED	200	P	Y
REJECTED	REJECTED	950	R	Y
CANCELED	DIRECT EXPENSE STATUS CANCELED	999	C	Y



ACCOUNTS PAYABLE MODULE CONFIGURATION AND SETUP

CONSULTANT INVOICE STATUS CODES

Status	Description	Sequence	Status Flag	Active
RECEIVED	CONSULTANT INVOICE RECEIVED AND ENTERED INTO THE SYSTEM	100	O	Y
UNDER REVIEW	CONSULTANT INVOICE IS UNDER REVIEW	200	O	Y
CONSULT INPUT REQ	CONSULTANT INPUT REQUIRED TO CLARIFY AN ISSUE OR ANSWER QUESTIONS	300	O	Y
APPROVED FOR PAYMENT	APPROVED FOR PAYMENT (REQUIRES EXPENSE ALLOCATION VALIDATION)	400	A	Y
PROCESSED	CONSULTANT INVOICE PROCESSED IN OK CORRAL	500	R	Y
VOIDED	CONSULTANT INVOICE VOIDED AND READY FOR RE-PROCESSING	800	V	Y
REJECTED	CONSULTANT INVOICE REJECTED	900	J	Y

PAYMENT APPLICATION STATUS CODES

Status	Description	Sequence	Status Flag	Active
RECEIVED	PAY APPLICATION RECEIVED AND ENTERED INTO THE SYSTEM	100	O	Y
UNDER REVIEW	PAY APPLICATION IS UNDER REVIEW	200	O	Y
CONTRACTOR INPUT REQ	CONTRACTOR INPUT IS REQUIRED TO CLARIFY AN ISSUE OR ANSWER QUESTIONS	300	O	Y
APPROVED FOR PAYMENT	APPROVED FOR PAYMENT (REQUIRES EXPENSE ALLOCATION VALIDATION)	400	A	Y
PROCESSED	PAY APPLICATION PROCESSED	500	R	Y
VOIDED	PAY APPLICATION VOIDED AND READY FOR RE-PROCESSING	800	V	Y
REJECTED	PAYMENT APPLICATION REJECTED	900	J	Y

3.0 SYSTEM OPERATION

ENVIRONMENT

LOGGING INTO THE SYSTEM









- ⚙ User Name: This field is populated with the user login.
- ⚙ Password: This field is populated with the password.
- ⚙ Login: Clicking the login button passes the user login and password information to the system.

TITLE BARS






AiM Program Title Bar (see top line from left to right):

- 
AiM Title: clicking on this title will return you to the AiM WorkDesk (shown above) from any screen.
- 
Greeting: displays a greeting to the logged on user.
- 
Logout: clicking on this link will log the current user out of AiM.
- 
About: displays AiM version, database properties, user session information, and any third party licenses.
- 
Help: brings up the AiM help documentation.
- 
Menu: The WorkDesk menu lists all available modules based on license and role permissions.



Module Main Title Bar:

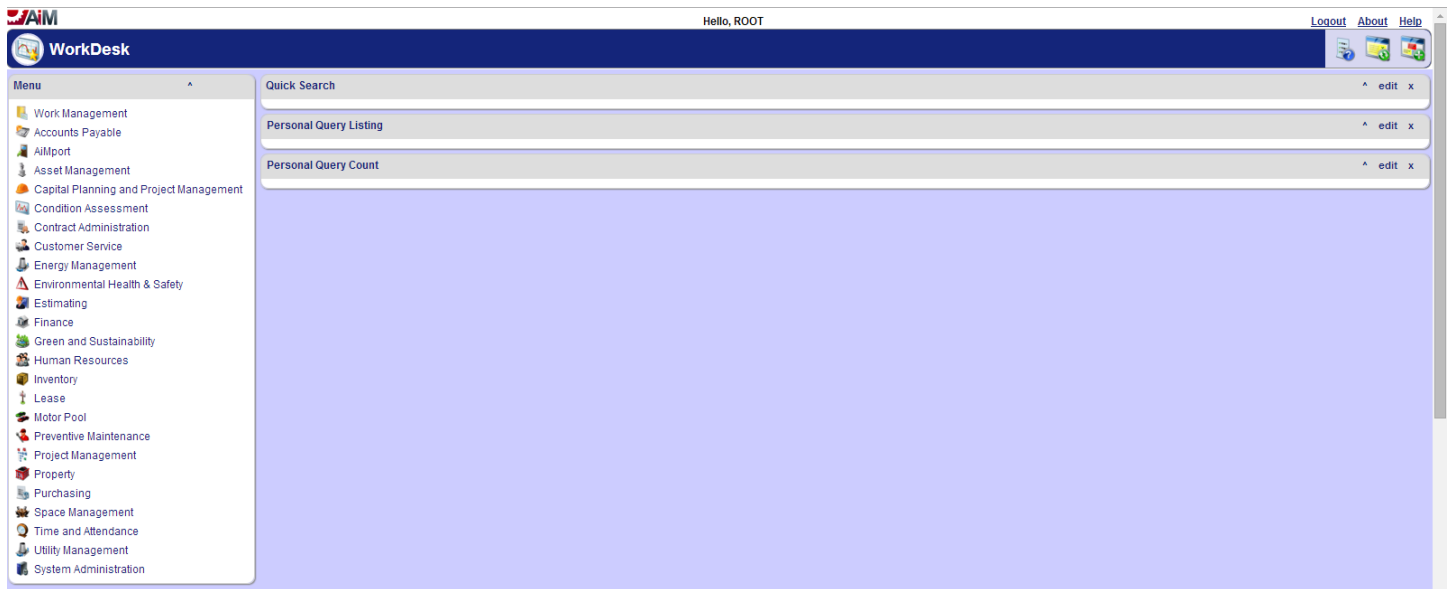
-  **Module Name:** Clicking on the module icon (in this case, the icon to the left of “Project”) returns the user to the Module WorkDesk (just as clicking the AiM Logo Icon returns the user to the AiM WorkDesk).
-  **Icon bar:** Icons displayed are appropriate to the active screen/activity. Mouse/hover over the icon within the screen for a tooltip description of the icon’s function.
-  **Menus:** Modules have two menus, the primary listing of screens to transact within a given module and the setup menu that lists screens devoted to defining setup codes.
 - Note that the setup screen menu must be exploded to see the setup screens. Click the ellipse (...) to view the setup screens menu and click the caret (^) to collapse the menu.

WORKDESK

The WorkDesk personal information system offers a graphical gateway to important business information that users access every day. The WorkDesk aggregates user-specified data such as notices, approvals, tasks, queries, and more.

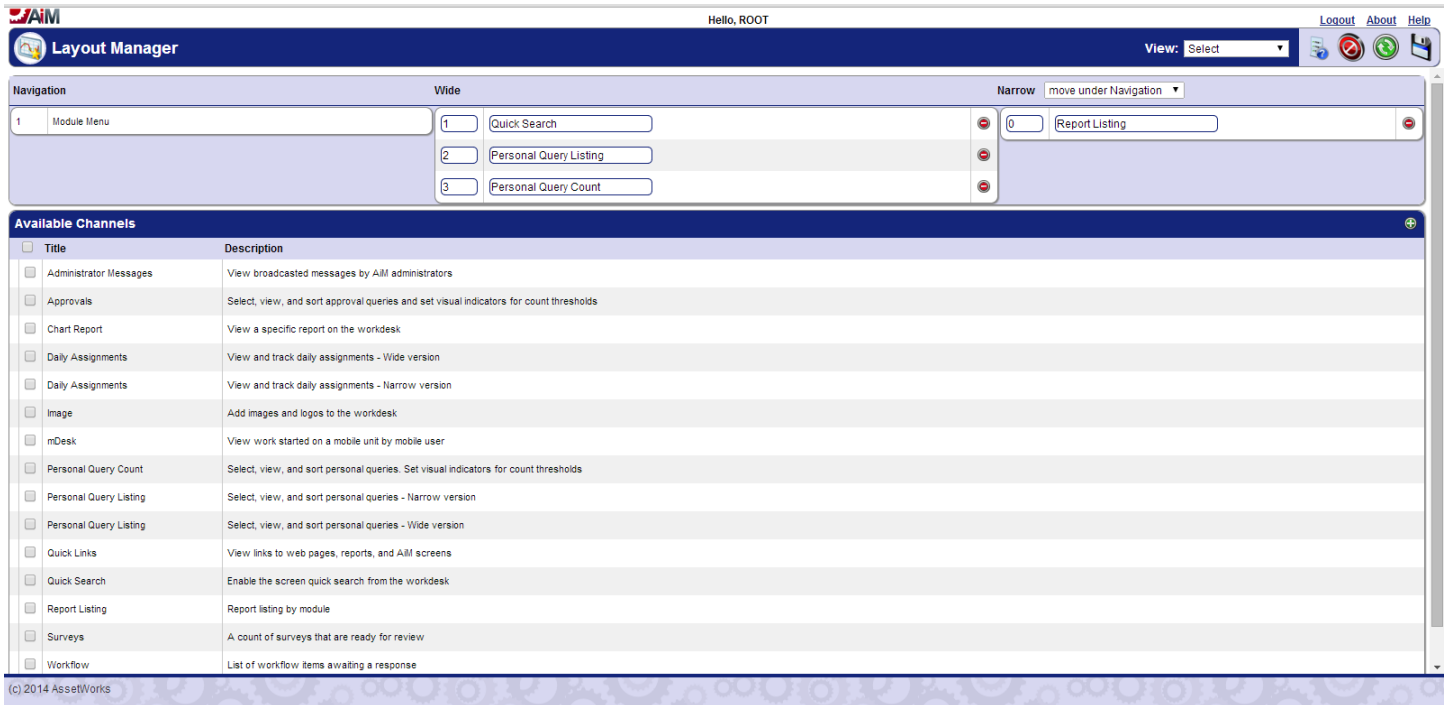
The body of the WorkDesk screen will contain channels, or blocks of information based on personal queries defined by the user. Content may contain:

- Personal queries linking the user to transactions requiring approval.
- Quick links such as web pages, AiM screens, AiM reports.
- Administrator Messages delivered in the form of global informational messages.
- Personal query counts to link the user to transactions activity in real time.
- Displays an employee's work for the day, as listed on their Daily Assignment Sheets. Updates dynamically throughout the day.



LAYOUT MANAGER SCREEN

The Layout Manager Screen determines the layout of the WorkDesk Channels. The user first determines where to place the channel, then selects the channel to place on the WorkDesk, and finally clicks on the green plus sign on the Available Channels bar.



Administrator Messages Channel

The Administrator Messages Channel is used to display communication messages from the application administrator to the users on their respective WorkDesks. This is a wide format channel appearing on the right side of the WorkDesk. Messages will display in this channel if the current date is between the message start and message expire dates as identified by the administrator. More than one message may appear in this channel. If groups are assigned to the administrator message detail, only users in those groups will see the message.

Approvals Channel

The Approvals Channel displays a count of various records that are awaiting approval. These approvals are based on personal queries constructed on query screens in the various modules of the system. Common approvals are customer service request approvals and timecard approvals. As such, personal queries constructed on the customer service request approval and timecard approval query screens are eligible to appear in the approvals channel. This is a narrow channel. Once this channel is added to the WorkDesk, the user can edit parameters by clicking the edit link on the channel. Note: if a manager is responsible for approving the customer service requests in a particular facility area, and is the backup approver for a neighboring facility area, two approval channels should be created on the WorkDesk - one for each facility area.

Chart Report Channel

The Chart Report Channel is used to display and run graphical (chart) reports on the WorkDesk. The selected report will display and run in this wide format channel. Graphical (chart) reports are created using the BIRT reporting tool.

Content Channel

The Content Channel is a wide format channel used to embed websites (or website type information) on the WorkDesk, displaying the specified URL address page view inside the channel.

Daily Assignments Channel



AiM™ CPPM Standard Operation Procedures

The Daily Assignments Channel displays a listing of work order/phase records to which the user has been assigned for the current date. This is added as either a narrow or wide format channel. The narrow channel displays work order and phase. The wide channel also displays the phase description. The user can click on any of the work order/phase links to open the specified record. The effective management of daily assignments requires the coordination of work order/phase statuses, phase shop person assignments, and the creation of a daily assignment list. The Employee Profile and User Security Screens must also be associated with each other using the employee identification field on the User Security Screen.

External Feed Channel

The External Feed Channel is used to add really simple syndication (RSS) feeds from a specified website to the WorkDesk. This wide channel will display headlines from an RSS site. Once this channel has been added to the WorkDesk, edit specific parameters by clicking the edit link on the channel.

Image Channel

The Image Channel displays image files on the WorkDesk. Images are set up in the document administrator, and saved in the document repository. This narrow channel can be associated with a URL address, which will launch when the image is clicked.

Personal Query Count Channel

The Personal Query Count Channel displays the counts for specified personal queries on the WorkDesk. On this wide channel, the count (number of rows returned) will display next to each personal query listed. Each personal query listed can be launched by clicking on it.

Personal Query Listing Channel

The Personal Query Listing Channels display a listing of your personal queries on the WorkDesk. This can be added as either a narrow or a wide channel and listed queries can be launched and run by clicking on them.

Quick links Channel

The Quick Links Channel displays a list of quick links on the WorkDesk. This is a narrow channel. Quick links can be shortcuts either to screens, reports or websites. Clicking on a link will open the target screen/report/website.

Report Listing Channel

The Report Listing Channel displays a list of reports on the WorkDesk. On this narrow channel, report links can be clicked to run the selected report directly from the WorkDesk. This provides convenient access to frequently viewed reports.

Reports are created using the BIRT reporting tool.

Surveys Channel









The Surveys Channel displays a count and a link to surveys sent to the user. The survey type and definition must be set up in the System Administration Module and are linked to a phase status or contract.

SCREEN TYPE: SEARCH SCREEN

The body of the search screen contains fields and criteria for searching data and creating pertinent search results. This section will describe search icons, the quick search field, and search qualifiers. Below is an example of a search screen:

The screenshot displays the 'Work Order' search interface. At the top, there is a navigation bar with the 'Work Order' title and a 'Queries' dropdown menu. The main search area is a grid of fields, each with a dropdown menu and a search icon. The fields include: Description, Created By, Date Created, Status, Region, Facility, Project, Problem Code, Type, Category, Organization, Requestor, Contact, Contact Phone, Contact Email, Surge, Current Date, Customer Request, Reference, Shop, Shop Person, Cash Flow Y1, Cash Flow Y2, Cash Flow Y3, Cash Flow Y4, Cash Flow Y5, Condition Assessment Priority, Fiscal Year, Extra Description, Editor, and Edit Date. Below the search fields, there is a list of related sections, each with a 'show' link: Work Order Costs, Phase, Phase Costs, Account Setup, Offset Account Setup, Shop Person Assignment, Condition Assessment Regulation, Checkpoint Measurements, Dependencies, Work Order Account Setup, Work Order Offset Account Setup, and Property Zones. The footer of the page shows '(c) 2011 AssetWorks'.

AIM SEARCH ICONS

Icons	Actions	Icons	Actions
	Start Search		Execute Search
	Reset Search		Cancel Search
	Create Personal Query		Delete Personal Query
	Save Personal Query		Quick Search (at screen footer)




BROWSING DATA (RESULTS OF A SEARCH)

Work Order #	Description	Status	Type	Category	State	Facility	Property	Date Created
USBE501	REPLACE AGING BUILT-UP ROOFING FLOOR-WIDE: FLOOR(S) R	99-CLOSED	FCA	DM	PSU	MAIN CAMPUS	B0006B	May 10, 2010 03:14 PM
USBEL04	INSTALL EMERGENCY GENERATOR AND POWER NETWORK FLOOR-WIDE: FLOOR(S) 1, 2, 3, 4, B	16-FCA OPEN	FCA	PA	PSU	MAIN CAMPUS	B0006B	Feb 24, 2011 03:08 PM
SB1HV03	REPLACE FUME HOODS (INCLUDING MECHANICAL SYSTEMS) FLOOR-WIDE: FLOOR(S) 2, 3, 4, 5, 6	16-FCA OPEN	FCA	DM	PSU	MAIN CAMPUS	B0003	Feb 24, 2011 03:22 PM
SB1FS05	INSTALL / REPLACE EXIT SIGNS FLOOR-WIDE: FLOOR(S) 1, 2, 3, 4, 5, 6, B, M, SB	99-CLOSED	FCA	CR	PSU	MAIN CAMPUS	B0003	Feb 24, 2011 03:15 PM
SB1FS03	REPLACE FIRE ALARM SYSTEM FLOOR-WIDE: FLOOR(S) 1, 2, 3, 4, 5, 6, B, M, SB	99-CLOSED	FCA	CR	PSU	MAIN CAMPUS	B0003	Feb 24, 2011 03:19 PM
SB1ES02	AGING BUILT-UP ROOFING REPLACEMENT FLOOR-WIDE: FLOOR(S) R	99-CLOSED	FCA	DM	PSU	MAIN CAMPUS	B0003	Jan 31, 2011 09:11 AM
SB1AC02	DRINKING FOUNTAIN AND RESTROOM ACCESSIBILITY UPGRADES FLOOR-WIDE: FLOOR(S) 1, 2, 3, 4, 5, 6, B, M	99-CLOSED	FCA	PA	PSU	MAIN CAMPUS	B0003	Feb 24, 2011 03:24 PM
NACCHV01	INSTALL LIQUID AIR-COOLED CHILLER ITEM ONLY: FLOOR(S) 1	16-FCA OPEN	FCA	CR	PSU	MAIN CAMPUS	B0040	Feb 24, 2011 02:24 PM
NACCEL01	VARIABLE FREQUENCY DRIVE RENEWAL ITEM ONLY: FLOOR(S) 1	16-FCA OPEN	FCA	CR	PSU	MAIN CAMPUS	B0040	Feb 24, 2011 02:39 PM
MONTF03	REPLACE FIRE ALARM SYSTEM FLOOR-WIDE: FLOOR(S) 1, 2, 3, 4, B	99-CLOSED	FCA	CR	PSU	MAIN CAMPUS	B0102	Feb 24, 2011 02:50 PM
MLPL02	INSTALL AUTOMATIC FLUSH VALVES ON LAVATORIES ROOM ONLY: FLOOR(S) 1, 2, 3, 4, 5, B	99-CLOSED	FCA	PA	PSU	MAIN CAMPUS	B0022	May 10, 2010 04:47 PM
MLHV01	REPLACE WATER-COOLED CHILLER ITEM ONLY: FLOOR(S) SB	99-CLOSED	FCA	CR	PSU	MAIN CAMPUS	B0022	Feb 24, 2011 11:53 AM
MLE502	SINGLE-PLY ROOF MEMBRANE REPLACEMENT FLOOR-WIDE: FLOOR(S) R	99-CLOSED	FCA	DM	PSU	MAIN CAMPUS	B0022	May 10, 2010 04:46 PM
MLAC03	DRINKING FOUNTAIN AND RESTROOM TOILET PARTITION UPGRADES FLOOR-WIDE: FLOOR(S) 1, 2, 3, 4, 5, B	99-CLOSED	FCA	PA	PSU	MAIN	B0022	May 10, 2010

- Column Headings:** Shows column/field names for dataset displayed in body of screen. Clicking on column headings will sort data by that column.
- Data List:** displays data listing for module process or setup table selected. First column will contain an underlined link to select a data item.
- Page Navigation by page number:** Type a page number in the box and click the Go Icon .
- Page Navigation by arrow icon:** Click the single arrow icons to go forward/backward one page; click the double arrow icons to move to the beginning/end of the list.
- Record Count:** displays the total number of records found for the search selection.
- Icon Bar:** displays all AiM icons that apply to the current screen. Mouse/hover over icon to provide description of icon function.

SCREEN TYPE: ENTRY SCREEN

NOTE: A view or edit screen for a record will have the same fields as an entry screen.

- 
Body: All entry screens contain the same format (Fields bordered in red are required to save the record).
- 
Blocks: Information is segmented into data blocks, with headings (example above shows Organization, Property, and Classification Blocks).
- 
Detail Data: If there is dependent data (Phases are dependent to a work order, line items are dependent to a Purchase Order), there will be a Title Bar across the bottom section of the screen, with an Add Detail (and sometimes a Delete Detail) record icon.

STANDARD VIEWS












The following table lists the standard view screens found throughout AiM that provide the same functionality regardless of what module they are located:















Standard View	Description
Extra Description	The Extra Description View provides an additional 4000 characters to describe the parent record. This information is included in the parent record's search screen and is ideal when the basic 255-character description is insufficient.
Received Email	This view displays all the received emails relating to the work order. In order to receive and list emails in this view, an email address must be set up in the Email Address View of this screen. A corresponding email address/alias must be set up on an email server and associated with AiM via the Email Configuration Setup Screen in the System Administration Module.
Sent Email	A display of sent emails is displayed on this view. This will display all emails created by using the email button in the toolbar.
Notes Log	The Notes Log View enables the user to add notes specific to the parent record. The Notes Log View accommodates 2000 characters and is classified by a note type code. Notes, once saved, cannot be edited. The notes log can display notes on the WorkDesk and optionally display a filtered list of notes by type.
User Defined Fields	User Defined Fields (UDFs) provide the ability to create fields for data entry not provided in the baseline product. UDFs must be built in the AiM System Administration Module for the module screen where the UDF will be employed. The UDF can be linked to a validation table enabling the user to select values from a pre-defined list. The UDF may even be marked as required to complete a record. User defined fields create additional customized reporting and management capabilities.
Status History	The Status History View provides a view-only record of statuses over time. Status history is automatically updated as statuses change. The status editor and date are included as a part of this history. The status history provides an excellent metric for turnaround time on work.
Related Documents	The Related Documents View enables the user to attach any electronic record, such as a document, spreadsheet, or image from the document repository to the record on which the user is working. Related documents could also be a URL (web) shortcut.








AiM 7.0 ICON LIST

This quick reference icon table provides functional description of each icon. The tables are grouped by header, detail, document-related icons, and search icons.

AiM HEADER ICONS


Header Toolbar	Icon	Description
New		The new icon is selected to insert new records.
Edit		The edit icon is selected to update retrieved records.
Delete		The delete icon is selected to delete items in AiM.
Save		The save icon is selected to save edits made to a retrieved record or to save a new record.
Cancel		The cancel icon cancels the current transaction/action.
Copy		The copy icon enables the copying of the retrieved record. The copy icon is found on a number of screens including the Work Order, PM Template, Master Asset Profile, etc.
Back to Browse		The back-to-browse icon takes the user back to the last search results list.
Viewfinder		The viewfinder icon displays the transactions detail associated with the retrieved record (e.g., enables viewing of a Work Order's transactions).
Print		The print icon retrieves pertinent reports to print against the retrieved record.
Help		The help icon retrieves online help descriptions.
Space Viewer		The space viewer icon launches related CAD drawings. The space viewer icon is found on such screens as the Asset Master Profile, Location Profile, etc.

Load Timecard		The load timecard icon launches the Rapid Timecard Entry Screen. This icon is found on the Phase and Daily Assignment screens.
Launch External Charges		This icon launches the External Charges screen. This icon is located on the Phase screen.
Launch Material Requests		This icon launches the Material Request Screen. This icon is found on the Phase, Work Planner, and Work Scheduler screens.
External URL		External URL's can be attached to any screen in AiM.
Approve		The approve icon approves selected records. It is found on approval screens such as the Timecard Approval, Shop Stock Approval, Purchase Order Invoice Approval, etc.
Approve All		The approve all icon performs the same function as the approve icon.
Reject		The reject icon is associated with the approve icon and rejects records not ready for approval.
Error Log		The error log icon displays the errors encountered when attempted to approve records.
Process/Generate		The process/generate icon initiates an action to generate records. This icon is found on such screens as the PM Generator, Inventory Reorder Generator, Rapid Location Update, etc.
Work Planner		This icon launches the Work Planner screen. It is found on the Unit Cost Estimator screen.
Work Scheduler		This icon launches the Work Scheduler screen. It is found on the Work Planner screen.
Budget Manager		This icon launches the Budget Manager screen. It is found on the Capital Project and Date Manager screens.
Date Manager		This icon launches the Date Manager screen. It is found on the Capital Project and Budget Manager screens.
Budget Revision		This icon launches the Budget Revision icon and is found on the Capital Project and Budget Manager screens.

Email		The email icon enables the user to send an email with the record URL attached. For instance, the user could send an email with a linked specific work order.
Adjustment		This icon launches the adjustment screen for the following screens: Asset Release/Return, Funding Source, and Employee Attendance screens.
Clock In		The clock in icon is located on the Employee Attendance screen and clocks attendance in as the icon is selected.
Clock Out		The clock out icon is located on the Employee Attendance screen and clocks attendance out as the icon is selected.
Accept		This icon is used to accept actions such as accepting a cancel request.
Decline		This icon is used to decline actions such as declining a cancel request.
Unit Cost Estimator		This icon launches the Unit Cost Estimator screen. This icon is found on the Work Planner screen.









AiM DETAIL ICONS










Detail Toolbar	Icons	Description
Add Detail		This icon is selected to add detail items to the main record.
Delete Detail		This icon is selected to delete detail items.
Attach		This icon is selected to attach documents, etc. to the detail record.
Calendar		This is the calendar icon to rapid input of dates.
Refresh		The refresh icon resets the current page.
Daily Assignment Browse		This icon launches the Daily Assignment Browse list. This icon is found on the Phase and Shop Phase Manager screens.
Shop Daily Assignment		This icon launches the Shop Daily Assignment screen and is found on the Phase and Shop Phase Manager screens.
Work Planner		This icon launches the Work Planner screen and is found on the Phase and Shop Phase Manager screens.
Work Scheduler		This icon launches the Work Scheduler screen and is found on the Phase and Shop Phase Manager screens.
Error Flag		This icon will appear next to any transactions that did not process for whatever reason. Often found on approval screens to isolate issues as they arise.
Go		The go icon enables the user to enter a page number on multiple page record retrievals.
Previous		This icon is selected to retrieve the previous record on multiple page record retrievals.
Next		This icon is selected to retrieve the next record on multiple page record retrievals.
First		This icon is selected to retrieve the next record on multiple page record retrievals.
Last		This icon is selected to retrieve the last record on multiple page record retrievals.
Filter		This icon enables the user to enter a value to filter results for a given screen. For example, entering a work order number to retrieve specific work order without conducting a search.

Done		This icon is used by the user when they have completed the detail record
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AiM DOCUMENT ICONS

Detail Toolbar	Icons 6.0	Description
Archive		This icon represents the archive document type.
Audio		This icon represents the audio document type.
Design		This icon represents the design document type.
Document		This icon represents the document, document type.
Email		This icon represents the email document type.
Image		This icon represents the image document type.
Invoice		This icon represents the invoice document type.
List		This icon represents the list document type.
Log		This icon represents the log document type.
Report		This icon represents the report document type.
Schedule		This icon represents the schedule document type.
Script		This icon represents the script document type.
Specification		This icon represents the specification document type.
Spreadsheet		This icon represents the spreadsheet document type.
Survey		This icon represents the survey document type.
Template		This icon represents the template document type.

Video		This icon represents the video document type.
Web Page		This icon represents the web page document type.
Check In		This icon is selected to check in documents from the Document Profile screen.
Check Out		This icon is selected to check out documents from the Document Profile screen.
Cancel Check Out		This icon cancels the checkout request.
Lock Document		Selecting this icon locks the document in the Document Profile screen prior to modifications.
Cancel Lock Document		This icon cancels the lock document command from the previous icon.
Unlock Document		This icon unlocks the document after modifications have been made.

AiM SEARCH ICONS		
Search Toolbar	Icons 6.0	Description
Open Search Screen		This icon opens the search screen tailored to the primary screen (e.g., Work Order screen)
Execute Search		Selecting this icon initiates the search based on user criteria
Reset Search		These icons reset the query page and removes prior criteria
Back to Screen		Selecting this icon returns the user to the previous screen
Create Personal Query		Selecting this icon opens the Personal Query screen
Save Personal Query		Selecting this icon saves the Personal Query
Delete Personal Query		This icon deletes the saved Personal Query
Footer Search		This icon enables the user to perform Quick searches
Show All		This icon shows all of the records for a given field after a search returns a subset of records

AiM MODULE ICONS

Menu Toolbar	Icons
Work Management	
Accounts Payable	
AiMport	
Asset Management	
Capital Planning and Project Management	
Condition Assessment	
Contract Administration	
Customer Service	
Environmental Health and Safety	
Estimating	
Finance	
Fixed Asset Management	
Green and Sustainability	
Human Resources	

Inventory	
Key and Access Control	
Key Performance Indicators	
Lease	
Motor Pool	
Preventive Maintenance	
Project Management	
Property	
Purchasing	
Space Management	
Time and Attendance	
Utilities Management	
System Administration	