STANDARD OPERATING PROCEDURES

Capital Planning and Project Management Module

REV 4 MAY 2015
AiM™ CPPM Standard Operation Procedures

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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:

<table>
<thead>
<tr>
<th>Status Flag</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Open</td>
<td>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.</td>
</tr>
<tr>
<td>Posted</td>
<td>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.</td>
</tr>
<tr>
<td>Canceled</td>
<td>When a status flag is saved it does not allow further editing.</td>
</tr>
<tr>
<td>Rejected</td>
<td>This status flag is like the cancel status flag but it allows edits to enable re-opening the direct expense record.</td>
</tr>
<tr>
<td>Voiced</td>
<td>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.</td>
</tr>
</tbody>
</table>
**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 of a project.
4. **Labor.** This type is added to track Project Manager Time input for Labor tracking against a Capital Project.
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:

<table>
<thead>
<tr>
<th>Status Flag</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pending</td>
<td>The pending status does not allow transactions and is for planning purposes only. Original budget figures can be entered.</td>
</tr>
<tr>
<td>Active</td>
<td>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.</td>
</tr>
<tr>
<td>Work Complete</td>
<td>This status does not allow new transactions but does allow the completion of transactions started prior to work complete.</td>
</tr>
<tr>
<td>Canceled</td>
<td>This status does not allow any transactions. This status cannot be selected if there are unprocessed transactions associated to this component.</td>
</tr>
<tr>
<td>Closed</td>
<td>Project Component is closed and no transactions are allowed. This status cannot be selected if there are unprocessed transactions associated to this component.</td>
</tr>
</tbody>
</table>
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 – LRFP

Phase 1 - Selection

AiM Capital Project Process – LRFP Phase I (Selection)

1. **Process Start**
   - Project Input

2. **Initiation**
   - Workflow
     - **Assoc Dir LRFP**
     - **Director LRFP**
     - **Univ Architect**
     - **Asst Univ Architect**

3. **Conceptual Planning**
   - Workflow
     - **Director LRFP**
     - **Univ Architect**
     - **Asst Univ Architect**

4. **VPAF Approval**
   - *Unanimous*
     - **Bam Director**
     - **Assoc VP UA**

5. **BOR Project Approval**
   - *First Response*
     - **Assoc Dir LRFP**
     - **Director LRFP**
     - **Univ Architect**
     - **Asst Univ Architect**
     - **UA Plant Funds**
     - **Asst Dir 1**
     - **Asst Dir 2**
     - **Bam Director**
     - **UA Plant Funds**
     - **Admin Assoc LRFP**

6. **Assign Design ACCT**
   - *Unanimous*
     - **Bam Director**
     - **Assoc Dir LRFP**
     - **Director LRFP**
     - **Univ Architect**
     - **Asst Univ Architect**
     - **UA Plant Funds**
     - **Asst Dir 1**
     - **Asst Dir 2**
     - **Bam Director**
     - **UA Plant Funds**
     - **Admin Assoc LRFP**

7. **Prof Svcs Selection**
   - Board Approval
   - **Bam Director**
   - **Assoc Dir LRFP**
   - **Director LRFP**
   - **Univ Architect**
   - **Asst Univ Architect**
   - **UA Plant Funds**
   - **Asst Dir 1**
   - **Asst Dir 2**
   - **Bam Director**
   - **UA Plant Funds**
   - **Admin Assoc LRFP**
PHASE II - DESIGN

AiM Capital Project Process – LRFP Phase II (Design)

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

PHASE III - CONSTRUCTION

AiM Capital Project Process – LRFP 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
   3. 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
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)
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)**
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
   4. **PROJECT AD**
      1. Review final payments, contracts, WOs, IWAs
      2. Review Project Closeout checklist, attach checklist in AiM
   5. **ASSOC DIR LRFP**
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 LRFP**  
      1. Reconcile all final billings  
   2. **UA PLANT FUNDS**  
      1. Release any remaining encumbrance in FRS  
   3. **ASSOC DIR LRFP**  
      1. Respond to Workflow  

21. 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  

22. CLOSED (VICTORY)  
23. ON HOLD  
24. DECLINED (CLIENT DRIVEN, VP)  
25. CANCELED (INTERNAL)
Capital Project Approval Process – LRFP Interior Design

**PHASE I - DESIGN**

**AiM Capital Project Process – Interior Design (Design)**

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

- **[22] CANCELED**
  - NO GO

- **[22] DECLINED**
  - NO GO

- **ESTIMATE APPROVAL**
  - [6] ESTIMATE APPROVAL

- **FUND PROJECT**
  - [7] FUND PROJECT

**PHASE II - CONSTRUCTION**

Prepared for: Oklahoma State University
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
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.)
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

AiM Capital Project Process – FMCS (Design)
AiM™ CPPM Standard Operation Procedures

PHASE II - CONSTRUCTION

AiM Capital Project Process – FMCS (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)**
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
      2. Enter account information and amount requested in CP Notes Log
      3. Active appropriate design components
      4. 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**
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
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
   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

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

ADMIN ASST UTILITIES

PROCESS START

Project Input
[2] INITIATION

[22] CANCELED

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

[2] PM ASSIGNMENT

Assign PM
[2] PM ASSIGNMENT

*Workflow*
ENERGY SYS DIR
[4] BOR PROJ APPROVAL

GO

[6] BOR SELECT

*Workflow*
PROJECT MGR
ENERGY SYS DIR
[5] PROF SVC SELECTION

[7] ASSIGNED DESIGN ACCT

*UNANIMOUS*
BAM DIRECTOR
[7] ASSIGNED DESIGN ACCT

PHASE II - DESIGN

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

ENERGY SYS DIRECTOR

PROCESS START

8

*Workflow*
PROJECT MGR
ADM ASST UTIL
[8] PREDESIGN

CANCELED

CMAR?

YES

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

CMAR?

NO

*Workflow*
PROJECT MGR
ADM ASST UTIL
DIRECTOR FM

*First Response*
DIRECTOR FM
ADM ASST UTIL
[12] VPAF GMP APPROVAL

NO

*Workflow*
BAM DIRECTOR
[13] FUND BALANCE

14
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.
      2. Send email to attendees from AIM CP screen
      3. Update Extra Description, Planned Budget, Activity Schedule, etc. as appropriate
      4. Develop Project Components
      5. Enter project component budgets
      6. Update UDF for Completion Need Date
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.)
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 built.
      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. LRFP WOs, LRFP and FM IWAs
      3. Closeout contracts after reviewing note from ENERGY SYS DIRECTOR
      4. Reconcile/charge LRFP 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)**
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.
      2. Send email to attendees from AIM CP screen
      3. Update Extra Description, Planned Budget, Activity Schedule, etc. as appropriate
      4. 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: **PREDIGN**; 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

   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)
      - 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
          - 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
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**

**AiM Capital Project Process – Landscape Services (Design)**

**Process Start**
- Project Input

**2. Conceptual Planning**
- Design Req’d?
  - Yes
    - "Workflow" Landscape Mgr. Project Mgr.
  - No

**3. Pre-Design**
- Design Accept?
  - Yes
    - [4] Design
  - No
    - Declined

**4. Client Design App**
- Accept?
  - Yes
    - GO
  - No
    - Canceled

**5. Fund Design**
- CONTRACT SPCLST

**Prepared for: Oklahoma State University**
**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. ManagerOrg = 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: GROUNDSHDDCP
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
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
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
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 builds.
   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
   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.
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
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 LRFP
      2. DIRECTOR LRFP
   3. MANAGEMENT APPROVED
   4. ON HOLD
   5. REJECTED
   6. CANCELED
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 LRFP
   4. DIRECTOR LRFP

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**
      1. **CONST TEAM LEADER**
      2. **CCS DIRECTOR**
   3. **APPROVED**
      1. **DIRECTOR FACILITIES**
         1. Finalize Board Agenda Item and attach to the Budget Revision in AiM
         2. Respond to Workflow
      2. **ADMIN ASST FMCS /CONTRACT SPECIALIST**
         1. Attach Board item once received from Joyce
      3. **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
AiM™ CPPM Standard Operation Procedures

Budget Revision Approval Process – Utilities Above BOR

UTILITY 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
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
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
**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
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**

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<tr>
<td>PROJECT MANAGER</td>
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</table>

**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**
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**

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 Change Order/Change Directive**

### Potential Change Order/Change Directive Issue Process Documentation

1. **INITIATION**
   1. **PROJECT MANAGER**
      1. Enter Issue in AiM
      2. Enter a Line Item onto the issue if tying to a change order/directive
      3. 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**
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; 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**
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. **GEOSP 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. **GEOSP 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.
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.)
      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)
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 LRFP**
      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 LRFP**
      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
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 LRFP**
      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)
         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)**
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
      2. Link each phase to the IWA
      3. 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 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
         1. Review Amendment
         2. Respond to Workflow
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. LRFP REVIEW – Workflow: Serial; Go Status: **PM APPROVAL**; No Go Status: **CANCELED**
    1. **ADMIN ASSOC LRFP**
       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


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

<table>
<thead>
<tr>
<th>Status Flag</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Open</td>
<td>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.</td>
</tr>
<tr>
<td>Awarded</td>
<td>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.</td>
</tr>
<tr>
<td>Closed</td>
<td>No edits are allowed and all remaining encumbrances (if any) are relieved. Invoices can no longer be posted against this contract.</td>
</tr>
<tr>
<td>Canceled</td>
<td>No edits are allowed and all remaining encumbrances (if any) are relieved. Invoices can no longer be posted against this contract.</td>
</tr>
</tbody>
</table>
**LRFP 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

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
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**
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
AiM™ CPPM Standard Operation Procedures

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

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

**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**
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
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
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
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 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
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. **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:

<table>
<thead>
<tr>
<th>Status Flag</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Open</td>
<td>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.</td>
</tr>
<tr>
<td>Status</td>
<td>Description</td>
</tr>
<tr>
<td>------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Awarded</td>
<td>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.</td>
</tr>
<tr>
<td>Notice to Proceed</td>
<td>This status flag signals the contract is available for processing payment applications.</td>
</tr>
<tr>
<td>Closed</td>
<td>No edits are allowed and all remaining encumbrances (if any) are relieved. Payment applications can no longer be posted against this contract.</td>
</tr>
<tr>
<td>Canceled</td>
<td>No edits are allowed and all remaining encumbrances (if any) are relieved. Payment applications can no longer be posted against this contract.</td>
</tr>
</tbody>
</table>
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

Prepared for: Oklahoma State University
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
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 LRFP**
      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 CMAR
   3. **ADMIN ASSOC LRFP**
      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 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 and End Date
         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 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 LRFP**
      1. After final payment, change status to **COMPLETED**

15. ON HOLD
16. COMPLETED
17. CANCELED
LRFP HARD BID CONSTRUCTION CONTRACT PROCESS DOCUMENTATION

1. REQUESTED
   1. **ADMIN ASST LRFP**
      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
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 LRFP**
      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 LRFP**
       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 CONTRACTOR
    3. **ADMIN ASSOC LRFP**
       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 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**

14. **AWARDED – Workflow: Informational Only**
    1. **ASSOC DIR LRFP**
    2. **PROJECT AD**
    3. **PROJECT MANAGER**
    4. **ADMIN ASSOC LRFP**
       1. Notify CMAR to confirm receipt of the executed purchase order
       2. Change status to **NTP**

15. **NTP**
    1. **ADMIN ASSOC LRFP**
       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.
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
         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**
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**
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
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
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**
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**
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**
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.
LRFP Change Proposal Process - LRFP Documentation

1. OPEN
   1. ADMIN ASSOC LRFP
      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
   3. ASSOC DIR LRFP
   4. DIRECTOR LRFP
      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

## AiM Change Proposal Process – Utilities

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**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

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
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**

   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 is 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
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

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<thead>
<tr>
<th>Project Manager</th>
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<th>Submitted</th>
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<tbody>
<tr>
<td>1. Enter RFI description, date, and required fields.</td>
<td></td>
<td></td>
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<tr>
<td>2. Attach associated documents</td>
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<td></td>
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<tr>
<td>3. Change status to OPEN</td>
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</tr>
</tbody>
</table>

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 EQUIPMENT
11. 13 SPECIAL CONS
12. 14 CONVEYING
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 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
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**
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

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<th>Description</th>
<th>Employee</th>
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## Capital Projects Module Configuration and Setup

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### AiM™ CPPM Standard Operation Procedures

#### PERMITING
- **NECESSARY PERMITS SUBMITTED FOR APPROVAL AND RECEIVED**

#### PLANNED BUDGET APPR
- **CUSTOMER PLANNED BUDGET APPROVAL DATE**

#### PM ASSIGNMENT
- **DESIGN AND CONSTRUCTION PROJECT MANAGER ASSIGNMENT DATE**

#### PO ISSUE
- **AWARDED TO PURCHASE ORDER ISSUED TO AWARDED CONTRACTOR**

#### PRE-DESIGN KICKOFF
- **PRE DESIGN KICKOFF MEETING DATE**

#### PRELIM SCOPING MTG
- **PRELIMINARY SCOPING MEETING. MEETING WITH USERS TO ENSURE THE NEEDS ARE FULLY UNDERSTOOD**

#### PRJ PKG AT FM SUPPLY
- **PROJECT PACKAGE SUBMITTED TO FACILITIES MAINTENANCE SUPPLY FOR SUBMITTION INTO OK CORRAL**

#### PROGRAMMING WORKSHOP
- **PROGRAMMING WORKSHOP DATE**

#### PROJECT BUDGET
- **(BCL) FULL PROJECT BUDGET TO INCLUDE SCOPE, SUPPORT, ETC**

#### PROJECT DESC DOC APP
- **PROJECT DESCRIPTION DOCUMENT APPROVAL DATE**

#### PURCH PKG COMPLETE
- **FULL DESIGN, SPECIFICATIONS, BID PACKAGE COMPLETED AND READY FOR PURCHASING**

#### PURCHASING
- **PROJECT PROVIDED TO FM SUPPLY, SENT TO PURCHASING AND PRIOR TO ADVERTISEMENT**

#### SUBST COMPLETION
- **CERTIFICATE OF OCCUPANCY AT START; CONSTRUCTION COMPLETE AT END**

#### UNIVERSITY COST EST
- **UNIVERSITY COST ESTIMATE DEVELOPED FOR PROJECT SCOPE**

#### WARRANTY
- **CONTRACTOR 12 MONTH WARRANTY**

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# CONTRACT ADMINISTRATION MODULE CONFIGURATION AND SETUP

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OCCM | COMPLETED | COMPLETED | 1950 | Closed
OCCM | CANCELED | CANCELED | 1999 | Canceled

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<td>250</td>
<td>Open</td>
</tr>
<tr>
<td>ASBESTOS REVIEW</td>
<td>FM ASBESTOS REVIEW</td>
<td>260</td>
<td>Open</td>
</tr>
<tr>
<td>EHS REVIEW</td>
<td>EHS REVIEW</td>
<td>270</td>
<td>Open</td>
</tr>
<tr>
<td>LRFP REVIEW</td>
<td>LRFP REVIEW</td>
<td>280</td>
<td>Open</td>
</tr>
<tr>
<td>IT REVIEW</td>
<td>IT REVIEW</td>
<td>290</td>
<td>Open</td>
</tr>
<tr>
<td>PM APPROVAL</td>
<td>PM APPROVAL</td>
<td>300</td>
<td>Open</td>
</tr>
<tr>
<td>APPROVED</td>
<td>APPROVED</td>
<td>400</td>
<td>Approved</td>
</tr>
<tr>
<td>CANCELED</td>
<td>APPROVED</td>
<td>999</td>
<td>Canceled</td>
</tr>
</tbody>
</table>

### Type Status Description Sequence Status Flag

<table>
<thead>
<tr>
<th>Type</th>
<th>Status</th>
<th>Description</th>
<th>Sequence</th>
<th>Status Flag</th>
</tr>
</thead>
<tbody>
<tr>
<td>LRFP INT DESIGN</td>
<td>APPROVED</td>
<td>APPROVED</td>
<td>300</td>
<td>Open</td>
</tr>
<tr>
<td>LRFP INT DESIGN</td>
<td>NTP</td>
<td>NTP</td>
<td>400</td>
<td>Approved</td>
</tr>
<tr>
<td>LRFP INT DESIGN</td>
<td>COMPLETED</td>
<td>COMPLETED</td>
<td>900</td>
<td>Closed</td>
</tr>
<tr>
<td>LRFP INT DESIGN</td>
<td>ON HOLD</td>
<td>ON HOLD</td>
<td>950</td>
<td>Open</td>
</tr>
<tr>
<td>LRFP INT DESIGN</td>
<td>CANCELED</td>
<td>CANCELED</td>
<td>999</td>
<td>Canceled</td>
</tr>
</tbody>
</table>
FINANCE MODULE CONFIGURATION AND SETUP

DIRECT EXPENSE TYPES

<table>
<thead>
<tr>
<th>Expense Type</th>
<th>Description</th>
<th>Default</th>
<th>Timesheet</th>
<th>Active</th>
</tr>
</thead>
<tbody>
<tr>
<td>LRFP COMMISSIONING</td>
<td>LRFP COMMISSIONING</td>
<td>N</td>
<td>N</td>
<td>Y</td>
</tr>
<tr>
<td>LRFP FF&amp;E CONSULT</td>
<td>LRFP FF&amp;E CONSULTANT</td>
<td>N</td>
<td>N</td>
<td>Y</td>
</tr>
<tr>
<td>LRFP PRJ ADMIN FEE</td>
<td>LRFP PROJECT ADMIN FEE</td>
<td>N</td>
<td>N</td>
<td>Y</td>
</tr>
<tr>
<td>LRFP REIMBURSABLE</td>
<td>LRFP (REIMBURSABLE)</td>
<td>N</td>
<td>N</td>
<td>Y</td>
</tr>
</tbody>
</table>

DIRECT EXPENSE STATUS CODES

<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
<th>Sequence</th>
<th>Status Flag</th>
<th>Active</th>
</tr>
</thead>
<tbody>
<tr>
<td>OPEN</td>
<td>OPEN</td>
<td>100</td>
<td>O</td>
<td>Y</td>
</tr>
<tr>
<td>APPROVED</td>
<td>DIRECT EXPENSE STATUS APPROVED</td>
<td>200</td>
<td>P</td>
<td>Y</td>
</tr>
<tr>
<td>REJECTED</td>
<td>REJECTED</td>
<td>950</td>
<td>R</td>
<td>Y</td>
</tr>
<tr>
<td>CANCELED</td>
<td>DIRECT EXPENSE STATUS CANCELED</td>
<td>999</td>
<td>C</td>
<td>Y</td>
</tr>
</tbody>
</table>
### Accounts Payable Module Configuration and Setup

#### Consultant Invoice Status Codes

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

#### Payment Application Status Codes

<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
<th>Sequence</th>
<th>Status Flag</th>
<th>Active</th>
</tr>
</thead>
<tbody>
<tr>
<td>RECEIVED</td>
<td>PAY APPLICATION RECEIVED AND ENTERED INTO THE SYSTEM</td>
<td>100</td>
<td>O</td>
<td>Y</td>
</tr>
<tr>
<td>UNDER REVIEW</td>
<td>PAY APPLICATION IS UNDER REVIEW</td>
<td>200</td>
<td>O</td>
<td>Y</td>
</tr>
<tr>
<td>CONTRACTOR INPUT REQ</td>
<td>CONTRACTOR INPUT IS REQUIRED TO CLARIFY AN ISSUE OR ANSWER QUESTIONS</td>
<td>300</td>
<td>O</td>
<td>Y</td>
</tr>
<tr>
<td>APPROVED FOR PAYMENT</td>
<td>APPROVED FOR PAYMENT (REQUIRES EXPENSE ALLOCATION VALIDATION)</td>
<td>400</td>
<td>A</td>
<td>Y</td>
</tr>
<tr>
<td>PROCESSED</td>
<td>PAY APPLICATION PROCESSED</td>
<td>500</td>
<td>R</td>
<td>Y</td>
</tr>
<tr>
<td>VOIDED</td>
<td>PAY APPLICATION VOIDED AND READY FOR RE-PROCESSING</td>
<td>800</td>
<td>V</td>
<td>Y</td>
</tr>
<tr>
<td>REJECTED</td>
<td>PAYMENT APPLICATION REJECTED</td>
<td>900</td>
<td>J</td>
<td>Y</td>
</tr>
</tbody>
</table>
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.
**AiM™ CPPM Standard Operation Procedures**

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**TITLE BARS**

![AiM WorkDesk](image)

**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
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:
### AIM SEARCH ICONS

<table>
<thead>
<tr>
<th>Icons</th>
<th>Actions</th>
<th>Icons</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image1.png" alt="Icon" /></td>
<td>Start Search</td>
<td><img src="image2.png" alt="Icon" /></td>
<td>Execute Search</td>
</tr>
<tr>
<td><img src="image3.png" alt="Icon" /></td>
<td>Reset Search</td>
<td><img src="image4.png" alt="Icon" /></td>
<td>Cancel Search</td>
</tr>
<tr>
<td><img src="image5.png" alt="Icon" /></td>
<td>Create Personal Query</td>
<td><img src="image6.png" alt="Icon" /></td>
<td>Delete Personal Query</td>
</tr>
<tr>
<td><img src="image7.png" alt="Icon" /></td>
<td>Save Personal Query</td>
<td><img src="image8.png" alt="Icon" /></td>
<td>Quick Search (at screen footer)</td>
</tr>
</tbody>
</table>

---

**Notes:**

- **Start Search:** Initiates a search for specific data.
- **Execute Search:** Verifies and runs the search criteria to display results.
- **Reset Search:** Resets search criteria and clears any entered filters.
- **Cancel Search:** Closes the search session without applying any changes.
- **Create Personal Query:** Enables the creation of saved search queries for easy access.
- **Delete Personal Query:** Removes saved search queries.
- **Save Personal Query:** Saves personalized search queries for future use.
- **Quick Search (at screen footer):** Provides quick access to search functionality without navigating through menus.
**BROWSING DATA (RESULTS OF A SEARCH)**

- **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**

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**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:

<table>
<thead>
<tr>
<th>Standard View</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Extra Description</td>
<td>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.</td>
</tr>
<tr>
<td>Received Email</td>
<td>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.</td>
</tr>
<tr>
<td>Sent Email</td>
<td>A display of sent emails is displayed on this view. This will display all emails created by using the email button in the toolbar.</td>
</tr>
<tr>
<td>Notes Log</td>
<td>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. <strong>Notes, once saved, cannot be edited.</strong> The notes log can display notes on the WorkDesk and optionally display a filtered list of notes by type.</td>
</tr>
<tr>
<td>User Defined Fields</td>
<td>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.</td>
</tr>
<tr>
<td>Status History</td>
<td>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.</td>
</tr>
<tr>
<td>Related Documents</td>
<td>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.</td>
</tr>
</tbody>
</table>
**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

<table>
<thead>
<tr>
<th>Header Toolbar</th>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>New</td>
<td><img src="image" alt="New Icon" /></td>
<td>The new icon is selected to insert new records.</td>
</tr>
<tr>
<td>Edit</td>
<td><img src="image" alt="Edit Icon" /></td>
<td>The edit icon is selected to update retrieved records.</td>
</tr>
<tr>
<td>Delete</td>
<td><img src="image" alt="Delete Icon" /></td>
<td>The delete icon is selected to delete items in AiM.</td>
</tr>
<tr>
<td>Save</td>
<td><img src="image" alt="Save Icon" /></td>
<td>The save icon is selected to save edits made to a retrieved record or to save a new record.</td>
</tr>
<tr>
<td>Cancel</td>
<td><img src="image" alt="Cancel Icon" /></td>
<td>The cancel icon cancels the current transaction/action.</td>
</tr>
<tr>
<td>Copy</td>
<td><img src="image" alt="Copy Icon" /></td>
<td>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.</td>
</tr>
<tr>
<td>Back to Browse</td>
<td><img src="image" alt="Back to Browse Icon" /></td>
<td>The back-to-browse icon takes the user back to the last search results list.</td>
</tr>
<tr>
<td>Viewfinder</td>
<td><img src="image" alt="Viewfinder Icon" /></td>
<td>The viewfinder icon displays the transactions detail associated with the retrieved record (e.g., enables viewing of a Work Order’s transactions).</td>
</tr>
<tr>
<td>Print</td>
<td><img src="image" alt="Print Icon" /></td>
<td>The print icon retrieves pertinent reports to print against the retrieved record.</td>
</tr>
<tr>
<td>Help</td>
<td><img src="image" alt="Help Icon" /></td>
<td>The help icon retrieves online help descriptions.</td>
</tr>
<tr>
<td>Space Viewer</td>
<td><img src="image" alt="Space Viewer Icon" /></td>
<td>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.</td>
</tr>
<tr>
<td>Icon Description</td>
<td>Description</td>
<td></td>
</tr>
<tr>
<td>----------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td></td>
</tr>
<tr>
<td>Load Timecard</td>
<td>The load timecard icon launches the Rapid Timecard Entry Screen. This icon is found on the Phase and Daily Assignment screens.</td>
<td></td>
</tr>
<tr>
<td>Launch External Charges</td>
<td>This icon launches the External Charges screen. This icon is located on the Phase screen.</td>
<td></td>
</tr>
<tr>
<td>Launch Material Requests</td>
<td>This icon launches the Material Request Screen. This icon is found on the Phase, Work Planner, and Work Scheduler screens.</td>
<td></td>
</tr>
<tr>
<td>External URL</td>
<td>External URL’s can be attached to any screen in AiM.</td>
<td></td>
</tr>
<tr>
<td>Approve</td>
<td>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.</td>
<td></td>
</tr>
<tr>
<td>Approve All</td>
<td>The approve all icon performs the same function as the approve icon.</td>
<td></td>
</tr>
<tr>
<td>Reject</td>
<td>The reject icon is associated with the approve icon and rejects records not ready for approval.</td>
<td></td>
</tr>
<tr>
<td>Error Log</td>
<td>The error log icon displays the errors encountered when attempted to approve records.</td>
<td></td>
</tr>
<tr>
<td>Process/Generate</td>
<td>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.</td>
<td></td>
</tr>
<tr>
<td>Work Planner</td>
<td>This icon launches the Work Planner screen. It is found on the Unit Cost Estimator screen.</td>
<td></td>
</tr>
<tr>
<td>Work Scheduler</td>
<td>This icon launches the Work Scheduler screen. It is found on the Work Planner screen.</td>
<td></td>
</tr>
<tr>
<td>Budget Manager</td>
<td>This icon launches the Budget Manager screen. It is found on the Capital Project and Date Manager screens.</td>
<td></td>
</tr>
<tr>
<td>Date Manager</td>
<td>This icon launches the Date Manager screen. It is found on the Capital Project and Budget Manager screens.</td>
<td></td>
</tr>
<tr>
<td>Budget Revision</td>
<td>This icon launches the Budget Revision icon and is found on the Capital Project and Budget Manager screens.</td>
<td></td>
</tr>
<tr>
<td>Icon</td>
<td>Description</td>
<td></td>
</tr>
<tr>
<td>---------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
<td></td>
</tr>
<tr>
<td>Email</td>
<td>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.</td>
<td></td>
</tr>
<tr>
<td>Adjustment</td>
<td>This icon launches the adjustment screen for the following screens: Asset Release/Return, Funding Source, and Employee Attendance screens.</td>
<td></td>
</tr>
<tr>
<td>Clock In</td>
<td>The clock in icon is located on the Employee Attendance screen and clocks attendance in as the icon is selected.</td>
<td></td>
</tr>
<tr>
<td>Clock Out</td>
<td>The clock out icon is located on the Employee Attendance screen and clocks attendance out as the icon is selected.</td>
<td></td>
</tr>
<tr>
<td>Accept</td>
<td>This icon is used to accept actions such as accepting a cancel request.</td>
<td></td>
</tr>
<tr>
<td>Decline</td>
<td>This icon is used to decline actions such as declining a cancel request.</td>
<td></td>
</tr>
<tr>
<td>Unit Cost Estimator</td>
<td>This icon launches the Unit Cost Estimator screen. This icon is found on the Work Planner screen.</td>
<td></td>
</tr>
</tbody>
</table>
### AiM DETAIL ICONS

<table>
<thead>
<tr>
<th>Detail Toolbar</th>
<th>Icons</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add Detail</td>
<td><img src="image" alt="Add Detail Icon" /></td>
<td>This icon is selected to add detail items to the main record.</td>
</tr>
<tr>
<td>Delete Detail</td>
<td><img src="image" alt="Delete Detail Icon" /></td>
<td>This icon is selected to delete detail items.</td>
</tr>
<tr>
<td>Attach</td>
<td><img src="image" alt="Attach Icon" /></td>
<td>This icon is selected to attach documents, etc. to the detail record.</td>
</tr>
<tr>
<td>Calendar</td>
<td><img src="image" alt="Calendar Icon" /></td>
<td>This is the calendar icon to rapid input of dates.</td>
</tr>
<tr>
<td>Refresh</td>
<td><img src="image" alt="Refresh Icon" /></td>
<td>The refresh icon resets the current page.</td>
</tr>
<tr>
<td>Daily Assignment Browse</td>
<td><img src="image" alt="Daily Assignment Icon" /></td>
<td>This icon launches the Daily Assignment Browse list. This icon is found on the Phase and Shop Phase Manager screens.</td>
</tr>
<tr>
<td>Shop Daily Assignment</td>
<td><img src="image" alt="Shop Daily Assignment Icon" /></td>
<td>This icon launches the Shop Daily Assignment screen and is found on the Phase and Shop Phase Manager screens.</td>
</tr>
<tr>
<td>Work Planner</td>
<td><img src="image" alt="Work Planner Icon" /></td>
<td>This icon launches the Work Planner screen and is found on the Phase and Shop Phase Manager screens.</td>
</tr>
<tr>
<td>Work Scheduler</td>
<td><img src="image" alt="Work Scheduler Icon" /></td>
<td>This icon launches the Work Scheduler screen and is found on the Phase and Shop Phase Manager screens.</td>
</tr>
<tr>
<td>Error Flag</td>
<td><img src="image" alt="Error Flag Icon" /></td>
<td>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.</td>
</tr>
<tr>
<td>Go</td>
<td><img src="image" alt="Go Icon" /></td>
<td>The go icon enables the user to enter a page number on multiple page record retrievals.</td>
</tr>
<tr>
<td>Previous</td>
<td><img src="image" alt="Previous Icon" /></td>
<td>This icon is selected to retrieve the previous record on multiple page record retrievals.</td>
</tr>
<tr>
<td>Next</td>
<td><img src="image" alt="Next Icon" /></td>
<td>This icon is selected to retrieve the next record on multiple page record retrievals.</td>
</tr>
<tr>
<td>First</td>
<td><img src="image" alt="First Icon" /></td>
<td>This icon is selected to retrieve the next record on multiple page record retrievals.</td>
</tr>
<tr>
<td>Last</td>
<td><img src="image" alt="Last Icon" /></td>
<td>This icon is selected to retrieve the last record on multiple page record retrievals.</td>
</tr>
<tr>
<td>Filter</td>
<td><img src="image" alt="Filter Icon" /></td>
<td>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.</td>
</tr>
<tr>
<td>Done</td>
<td>This icon is used by the user when they have completed the detail record</td>
<td></td>
</tr>
</tbody>
</table>
## AIM DOCUMENT ICONS

<table>
<thead>
<tr>
<th>Detail Toolbar</th>
<th>Icons 6.0</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Archive</td>
<td><img src="image" alt="Archive" /></td>
<td>This icon represents the archive document type.</td>
</tr>
<tr>
<td>Audio</td>
<td><img src="image" alt="Audio" /></td>
<td>This icon represents the audio document type.</td>
</tr>
<tr>
<td>Design</td>
<td><img src="image" alt="Design" /></td>
<td>This icon represents the design document type.</td>
</tr>
<tr>
<td>Document</td>
<td><img src="image" alt="Document" /></td>
<td>This icon represents the document, document type.</td>
</tr>
<tr>
<td>Email</td>
<td><img src="image" alt="Email" /></td>
<td>This icon represents the email document type.</td>
</tr>
<tr>
<td>Image</td>
<td><img src="image" alt="Image" /></td>
<td>This icon represents the image document type.</td>
</tr>
<tr>
<td>Invoice</td>
<td><img src="image" alt="Invoice" /></td>
<td>This icon represents the invoice document type.</td>
</tr>
<tr>
<td>List</td>
<td><img src="image" alt="List" /></td>
<td>This icon represents the list document type.</td>
</tr>
<tr>
<td>Log</td>
<td><img src="image" alt="Log" /></td>
<td>This icon represents the log document type.</td>
</tr>
<tr>
<td>Report</td>
<td><img src="image" alt="Report" /></td>
<td>This icon represents the report document type.</td>
</tr>
<tr>
<td>Schedule</td>
<td><img src="image" alt="Schedule" /></td>
<td>This icon represents the schedule document type.</td>
</tr>
<tr>
<td>Script</td>
<td><img src="image" alt="Script" /></td>
<td>This icon represents the script document type.</td>
</tr>
<tr>
<td>Specification</td>
<td><img src="image" alt="Specification" /></td>
<td>This icon represents the specification document type.</td>
</tr>
<tr>
<td>Spreadsheet</td>
<td><img src="image" alt="Spreadsheet" /></td>
<td>This icon represents the spreadsheet document type.</td>
</tr>
<tr>
<td>Survey</td>
<td><img src="image" alt="Survey" /></td>
<td>This icon represents the survey document type.</td>
</tr>
<tr>
<td>Template</td>
<td><img src="image" alt="Template" /></td>
<td>This icon represents the template document type.</td>
</tr>
<tr>
<td>Document Type</td>
<td>Description</td>
<td></td>
</tr>
<tr>
<td>----------------------</td>
<td>------------------------------------------------------------------------------</td>
<td></td>
</tr>
<tr>
<td>Video</td>
<td>This icon represents the video document type.</td>
<td></td>
</tr>
<tr>
<td>Web Page</td>
<td>This icon represents the web page document type.</td>
<td></td>
</tr>
<tr>
<td>Check In</td>
<td>This icon is selected to check in documents from the Document Profile screen.</td>
<td></td>
</tr>
<tr>
<td>Check Out</td>
<td>This icon is selected to check out documents from the Document Profile screen.</td>
<td></td>
</tr>
<tr>
<td>Cancel Check Out</td>
<td>This icon cancels the checkout request.</td>
<td></td>
</tr>
<tr>
<td>Lock Document</td>
<td>Selecting this icon locks the document in the Document Profile screen prior to modifications.</td>
<td></td>
</tr>
<tr>
<td>Cancel Lock Document</td>
<td>This icon cancels the lock document command from the previous icon.</td>
<td></td>
</tr>
<tr>
<td>Unlock Document</td>
<td>This icon unlocks the document after modifications have been made.</td>
<td></td>
</tr>
</tbody>
</table>
## AiM SEARCH ICONS

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

<table>
<thead>
<tr>
<th>Menu Toolbar</th>
<th>Icons</th>
</tr>
</thead>
<tbody>
<tr>
<td>Work Management</td>
<td></td>
</tr>
<tr>
<td>Accounts Payable</td>
<td></td>
</tr>
<tr>
<td>AiMport</td>
<td></td>
</tr>
<tr>
<td>Asset Management</td>
<td></td>
</tr>
<tr>
<td>Capital Planning and Project Management</td>
<td></td>
</tr>
<tr>
<td>Condition Assessment</td>
<td></td>
</tr>
<tr>
<td>Contract Administration</td>
<td></td>
</tr>
<tr>
<td>Customer Service</td>
<td></td>
</tr>
<tr>
<td>Environmental Health and Safety</td>
<td></td>
</tr>
<tr>
<td>Estimating</td>
<td></td>
</tr>
<tr>
<td>Finance</td>
<td></td>
</tr>
<tr>
<td>Fixed Asset Management</td>
<td></td>
</tr>
<tr>
<td>Green and Sustainability</td>
<td></td>
</tr>
<tr>
<td>Human Resources</td>
<td></td>
</tr>
<tr>
<td>Section</td>
<td></td>
</tr>
<tr>
<td>--------------------------------------</td>
<td></td>
</tr>
<tr>
<td>Inventory</td>
<td></td>
</tr>
<tr>
<td>Key and Access Control</td>
<td></td>
</tr>
<tr>
<td>Key Performance Indicators</td>
<td></td>
</tr>
<tr>
<td>Lease</td>
<td></td>
</tr>
<tr>
<td>Motor Pool</td>
<td></td>
</tr>
<tr>
<td>Preventive Maintenance</td>
<td></td>
</tr>
<tr>
<td>Project Management</td>
<td></td>
</tr>
<tr>
<td>Property</td>
<td></td>
</tr>
<tr>
<td>Purchasing</td>
<td></td>
</tr>
<tr>
<td>Space Management</td>
<td></td>
</tr>
<tr>
<td>Time and Attendance</td>
<td></td>
</tr>
<tr>
<td>Utilities Management</td>
<td></td>
</tr>
<tr>
<td>System Administration</td>
<td></td>
</tr>
</tbody>
</table>