
NOTICE: This standard operating procedure is available to view digitally on the Facilities Management Kannapolis Zone 7 Archibus website: <http://facilities.uncc.edu/Kannapolis/>

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I. PURPOSE. This standard operating procedure (SOP) is a user reference for UNC Charlotte Facilities Management Division personnel and Zone 7 UNC Charlotte employees located at North Carolina Research Campus (NCRC), Kannapolis, North Carolina. This SOP references the agreement *Facilities Management Services Agreement between The University of North Carolina at Charlotte and the University of North Carolina at Chapel Hill and North Carolina State University*. The purpose of this SOP is to establish a reference and a standard system guideline for Archibus Zone 7 Web Central access in relation to the operation, monitoring, and routine maintenance associated with the North Carolina Research Campus buildings, Nutrition Building (Owner: UNC Chapel Hill) and Fruit and Vegetable Building (Owner: North Carolina State University). This SOP also establishes policy and procedure relating to Archibus Web Central standards, set up and access privileges provided for the NC Research Campus Zone 7 users.

II. SCOPE. Develop and implement standard operating procedures for the decisions and process flows implemented for NC Research Campus—Zone 7 Archibus Web Central users. Provide step-by-step processes and procedures involved when initiating and managing Zone 7 Work Request and Preventive Maintenance at the North Carolina Research Campus. Provide consolidated information and clarify processes, terminology and ensure Kannapolis Zone 7 work requests are initiated and completed efficiently by responsible parties. This SOP applies to all Zone 7 Web Central Archibus system users.

III. RESPONSIBILITIES. The Zone 7 Supervisor and Processing Assistant (PA) are primarily responsible for maintaining the Zone 7 Customer/FAM Archibus Access processes (Employee (EM) table), managing the Zone 7 Work Request completion processes and reporting any system problems that may arise to the Facilities Information Systems (FIS) department. Zone 7 personnel will work as the liaison to Facilities Management UNC Charlotte on all system-related areas not addressed in the SOP.

IV. PROCEDURES: ARCHIBUS ZONE 7 WORK REQUEST PROCESS

1. **Logging into Archibus.** Once a Kannapolis Zone 7 Customer/FAM has determined a building maintenance problem or facility need exists, the Customer/FAM or Supervisor begins the process of creating a work request by logging into Archibus.

1.1. Before a Customer/FAM can access Archibus, the Customer/FAM must complete a Customer/FAM Assignment form; then, the Zone 7 Processing Assistant (PA) or Supervisor

must then pre-enter the Customer/FAM's user information in the Edit Employees task located under the Administrative Task heading with the Supervisor role of Archibus Kannapolis.

1.2. Information entered into the Employee Details window includes name, email address, department, phone and building.

1.3. Once the Customer/FAM users' information has been loaded into the Employee table, Archibus access follows the standard processes currently established for Archibus Web Central users.

1.4. The user launches their Web Browser and accesses the UNC Charlotte Facilities Management Kannapolis Home Page at <http://facilities.uncc.edu/Kannapolis>.

1.4.1. For security reasons, the user must enter their Zone 7 assigned username and password. They then select the Kannapolis Zone 7 login button to access Archibus.

1.4.2. Upon login, the Customer/FAM information is verified and validated allowing the user access to Archibus.

2. Creating the Work Request form. After logging in, the Customer/FAM:

2.1. Selects the Building Operations Management Maintenance activity. User authentication will determine whether they are the Customer/FAM role or Supervisor role. The tasks available for the role will display.

2.2. Then, the user selects the Create Work Request Task. The Work Request form will display.

2.3. **NOTE:** Only a Zone 7 Supervisor/PA or a Customer/FAM can enter a Work Request for Zone 7.

2.3.1. The Customer/FAM employee data will automatically display in the form including name, phone, building information and department code.

2.3.2. In addition, only Zone 7 employee information is visible when selecting the "Requested For" field; information from the Employee (EM) table is pre-filtered to off campus employees.

2.3.3. The Kannapolis Banner account (336486) information is automatically assigned based upon Zone 7 Building information for each work request submitted.

3. Entering the Required Data and Submitting the Work Request Form. Customer/FAM completes the Create Work Request by entering the required information into the boxes provided.

3.1. Complete as much information as possible including the problem location and work description to insure adequate information is acquired for the Zone 7 Shop to complete the work request.

3.1.1. Complete the validated (blue text) fields such as the problem type by clicking on the ellipse button located to the right of the field and selecting from the list that displays.

3.2. The Work Request form is also auto populated with the building code, name, department, email, phone and Fund code; these fields are "read only". **NOTE:** The building where the Customer/FAM is located will be default.

3.3. Department (University) from Department (DP) table is pre filtered to the off campus departments

3.4. Problem type, location, description and urgency of work request are all required fields on the work request form.

3.5. After completing the Work Request form, the Customer/FAM submits the work request to the Shop by selecting the “Submit Work Request” button. Work Request goes into “Requested” status.

3.6. Once submitted, the Review page will display. To print the work request

4. Work Request is auto routed to Zone 7 Shop Supervisor.

4.1. All work requests are routed directly to the Zone 7 Shop Supervisor for estimate.

4.2. An email is generated to the Shop Supervisor and PA notifying them of the Work Request awaiting an estimate.

5. Shop Supervisor Estimates the Work Request Costs.

5.1. Once the Work Request reaches the shop, the Zone 7 Shop Supervisor provides an estimate for the Work Request for parts and hours and makes a determination concerning whether the Work Request is a Building Repair or an Improvement.

5.2. Estimates will include labor, if any, parts, external charges and shop stock.

NOTE: Estimates do not include the surcharges; surcharges are applied on the monthly invoice as per the services agreement with the Owners.

5.3. The Shop Supervisor also has the option of rejecting the Work Request at this point instead of applying an estimate. If rejected, an email notification is sent to the Customer/FAM with a reason for the Work Request rejection. The Work Request will go into “Rejected” status.

6. The Zone 7 Shop Supervisor determines and designates the WR as either a Building Repair or a Building Improvement.

6.1. **Building Improvements.** Building improvements are defined as a work request that is above and beyond normal building repair or day-to-day maintenance.

6.1.1. If a WR is determined to be a Building Improvement, the Work Request estimate is routed for approval to the Department’s Customer/FAM that submitted the request for building improvement.

6.1.2. Once submitted to the department’s Customer/FAM, the Work Request goes into “Submitted” status.

6.1.3. An email is generated to the Customer/FAM notifying them that the work request estimate has been completed and is available for approval.

6.1.4. **NOTE:** All Improvement Work Requests will be sent for approval to the Departmental Customer/FAM of the building where the work is to be completed.

6.2. **Building Repairs or Renewals.** If the WR is determined to be a Building Repair or Renewal, the Zone 7 Supervisor examines the estimated costs for the Work Request to determine if the repairs will be greater than, equal to or less than \$1000.

6.2.1. **Building Repairs greater than \$1000.** As per the Services Agreement (Attachment 1: Services, Paragraph 18), if the Building Repair estimate is greater than \$1000, then the estimate must first be routed to the Building Owner’s Customer/FAM for approval.

6.2.1.1. Once submitted to the Building Owner’s Customer/FAM, the Work Request goes into “Submitted” status.

6.2.1.2. **NOTE:** All Building Repair or Renewal Work Request estimates that are greater than \$1000 are sent to the Building Owner’s Customer/FAM for approval.

6.2.1.3. An email is generated to the Building Owner Customer/FAM notifying them that the Work Request estimate is available for approval.

6.2.2. **Building Repairs less than or equal to \$1000.** As stated in Attachment 1 of the Services Agreement (Paragraph 18), if the Building Renewal or Repair estimate is less than or equal to \$1000, then the estimate is automatically entered into “Approved status” and bypasses the Customer/FAM approval process and is ready for the craftsperson assignment process.

7. The Customer/FAM Receives the Estimate: Approves or Rejects Estimate. The Customer/FAM reviews the Work Request estimate and decides whether to approve or reject the Work Request.

7.1. If the Work Request is approved, it goes into “Approved” status; the approved work request estimate is then sent back to the Zone Shop Supervisor. An email notification is generated to the Shop Supervisor/PA.

7.2. If the Work Request is “Rejected”, the Shop Supervisor/PA will receive an email notification with a reason for the rejection. The rejected work request is sent to History.

8. Craftsperson Assignment. The Shop Supervisor receives the “Approved” Work Request back and issues the work request by logging into Archibus and utilizing the Supervisor role to enter Zone 7 Craftsperson assignments.

8.1. **NOTE:** When UNC Charlotte craftspersons are augmented by the Zone 7 Manager to assist with Zone 7 work request completion, the PA or Supervisor of the Zone where the Craftsperson(s) is pulled will be able to enter that Craftsperson’s time into the Zone 7 Work Request.

8.1.1. The Zone 7 Manager coordinates with UNC Charlotte and can view all UNC Charlotte craftspersons in Archibus for CF assignments.

8.1.1.1. The ability for the UNC Charlotte Zone Processing Assistant (PA) to view a Zone 7 Work Request for time entry will only be enabled when the Zone 7 Manager has selected the Archibus Web Central “Assign CF” task and requests that personnel be augmented from UNC Charlotte to assist with a Zone 7 Work Request.

8.1.2. **PLEASE NOTE:** The UNC Charlotte PA of the Zone where the craftsperson is normally assigned will only be able to view and apply time to a Zone 7 Work Request when their craftsperson has been augmented for Zone 7 work assignment.

9. Time and Materials are added to the Work Request. Zone 7 Supervisor or PA applies Craftsperson (CF) time, orders SDI parts (stock and non-stock), shop stock and any estimated external charges using existing screens.

9.1. **NOTE:** Shop Stock will only be used based upon Area A Supervisor authorization.

10. Work Request Issued. The work request is issued and sent out to be completed by the craftsperson(s). Construction or repairs begin on the work request. The Work Request is now in the “Issued /In Progress” status.

11. Work Request is Completed. At this point the work request is not closed. The work has been completed; however, not all costs have been applied to the work request.

12. Updates are performed to the work request. Once the work request is completed, updates of actual time, estimated material charges and stock used are added by the Zone 7 PA or Supervisor.

13. Complete and Finalize Work Request. Once the work has entered “ Completed” status, the Supervisor then logs in under the Supervisor role to:

13.1. Validate the work completed and that the time and material costs are applied correctly.

13.2. Mark the work request “Ready for Bill”.

13.3. Completed and ready-to-bill work requests are placed in queue to be invoiced.

14. Facilities Business Office (FBO) reviews the Work Request.

14.1. FBO will notify Zone 7 Supervisor/PA when they are preparing to lock the bill and run the invoice.

14.2. FBO will post and apply External Charge actuals through existing processes.

14.3. FBO will then lock the bill (“lock bill function”) and perform a review on all work orders that have been completed and that are ready for billing.

14.4. Once the review is completed, the FBO will begin the invoicing process.

14.5. All Kannapolis work requests are excluded from the UNC Charlotte campus FUPLOAD.

14.6. **NOTE:** Each month the FBO will generate an invoice separately and outside of Archibus for the 34 percent Predetermined Overhead Rate (POHR) in accordance with the services agreement established between UNC Charlotte Facilities Management and the NCRC Owners.

15. Work Request Invoice generated by the FBO.

15.1. The FBO generates a monthly Archibus invoice, one for each department (University) customer. The Invoice will include the Work Request actual material costs, any applied Craftsperson overtime and UNC Charlotte personnel labor used in addition to the external charges and the surcharge percentages that are applied by the FBO.

15.2. The FBO will select the “Generate Invoices” button in Archibus.

15.3. As work requests are invoiced, the Invoice number and Date will be assigned to mark that the WR has been invoiced.

15.4. Once the invoice is ready to view, Archibus generates an email notification informing the Zone 7 PA, Supervisor and Customer/FAM that the invoice has been posted.

15.5. PA will have an option to create a PDF file for the invoice or allow the Customer/FAM to view the invoice via Archibus Web Central.

15.6. The Bill Summary Report will provide all Work Requests completed and the overall costs.

15.7. An invoice (PDF file format) of the external charges will be posted when feasible for NCRC Owners by the FBO.

16. Work Request closed. Work Request is now in “Closed” status. The invoiced Work Request data is sent to Archibus Historical reports.

16.1. Invoiced work requests will be auto archived using existing processes.

16.2. **NOTE:** Work Request invoices found to have error overcharges or undercharges will require a new work request to be generated referencing the original work request in the Work Description details along with a reference to cost differences.

V. RATES

1. **Labor.** Labor rates charged by UNC Charlotte for standard labor services are \$0/ hour for Zone 7 personnel. As stated in the *Facilities Management Services Agreement between The University of North Carolina at Charlotte and the University of North Carolina at Chapel Hill and North Carolina State University*, all labor including base salaries and fringe benefits is paid upfront for the Zone 7 personnel by UNC Chapel Hill.

1.1. As stated in Paragraph 5 of the Attachment 1: Services of the service agreement, no charges are applied to labor unless UNC Charlotte main campus personnel are used to “augment Zone 7 personnel”; in these instances, standard labor service rates plus 20 percent will be charged “to cover all overhead”.

1.1.1. Also, when additional personnel are recruited for Zone 7, the work request will be billed standard UNC Charlotte labor rates and any overtime assessed plus the 20 percent surcharge and the time charged will be based upon “portal to portal” hours

1.1.2. The estimation of hours to complete the work request and the UNC Charlotte craftspersons used to augment Zone 7 must be preapproved by the Financial Account Manager (Customer/FAM) or Owners’ representative assigned to the NCRC Building Owner where the Work Request originated.

1.1.3. The UNC Charlotte Facilities Business Office (FBO) will manage and control labor surcharges in Archibus Building Operations Management using the FBO role Kannapolis Surcharge Management view.

2. **Overtime.** Overtime charges apply when overtime and/or any supplemental personnel are needed to accomplish a given task at Zone 7.

2.1. Zone 7 overtime labor is charged at the normal overtime labor rates plus a 20 percent surcharge.

2.2. As stated in paragraph 5 of Attachment 1: Services of the services agreement, any services above the standard level agreed upon will be preapproved by the representative (Customer/FAM) and all additional charges will be documented on the work request.

2.3. The UNC Charlotte Facilities Business Office (FBO) will manage and control overtime labor surcharges in Archibus Building Operations Management, FBO role Kannapolis Surcharge Management view.

VI. MATERIAL COSTS

1. As stated in Attachment 1: Services of the *Facilities Management Service Agreement between The University of North Carolina at Charlotte and the University of North Carolina at Chapel Hill and North Carolina State University*, materials used in the completion of Work Requests are “billed at cost plus 10 percent surcharge”.

1.1. **Parts.** Parts will be billed at cost plus assessed the material surcharge of 10 percent across the board; this surcharge applies to all parts including shop stock and non-stock materials ordered Strategic Distribution Inc (SDI) parts.

1.1.1. Any Purchase Orders for SDI materials or parts billed will be included in the monthly invoice for the specified Zone 7 department by the UNC Charlotte Facilities Business Office (FBO) to “document materials consumed” (Paragraph 6, Attachment 1: Services).

1.2. **Equipment and tools.** Equipment or tools rented or purchased will be viewed as Non stock or Stock charges (SDI) or External Charges. The standard 10 percent surcharge will be

applied by the FBO on all purchased or rented tools, startup and replacement equipment and other supplies for the shop to perform services for Zone 7.

1.2.1. As stated in paragraph 16, Attachment 1: Services of the services agreement, all equipment purchases will be approved prior to purchase and any equipment will be inventoried and tracked via Archibus Web Central

1.3. **NOTE:** UNC Charlotte Facilities Business Office (FBO) will manage and control material surcharges in Archibus Building Operations, FBO Role Kannapolis Surcharge Management view.

2. Non Warehouse External Charges.

2.1. **UNC Charlotte “Archibus-Generated” Charges.** Archibus generated charges are detailed on the work request.

2.2. **External costs outside of Archibus. NOTE:** This type of charge or purchase order is handled directly by the specific Kannapolis Institutions at the NCRC, and they are not entered into Archibus.

2.2.1. Any Purchase Orders created at the owner institutions and all the accompanying documentation and payments are managed by NCRC Building Owners directly; however, the Zone 7 Supervisor is responsible for services oversight and approval of any invoices for payment.

2.3. All external charges will be itemized on the invoice and will be assessed the 10 percent mark up.

2.4. **NOTE:** The UNC Charlotte Facilities Business Office (FBO) will manage and control external charge surcharges in Archibus Building Operations, FBO Role Kannapolis Surcharge Management view.

3. Other Charges.

3.1. **Travel Time.** As indicated in Attachment 1: Services of the services agreement, “transportation expense is charged at cost”. Travel time is tracked in Archibus and charged based upon “portal to portal” hours for UNC Charlotte craftspersons augmented to Zone 7 for work request completion.

3.2. **Predetermined Overhead Rate (POHR).** A 34 percent surcharge is applied to the overall monthly invoice for salaries and fringe benefits charged to the Owners, UNC Chapel Hill and UNC State; this surcharge will be handled on the invoice directly by the FBO outside of Archibus.

3.3. Fuel master.

3.3.1. UNC Charlotte Fuel will only be used by Zone 7 in an emergency. If fuel is used, Motor Fleet Administrator will send an invoice directly to NCRC Kannapolis.

VII. FACILITIES INFORMATION SYSTEMS (FIS) RESPONSIBILITIES

1. **Archibus Web Central and Work Management.** Archibus Web Central Kannapolis will be utilized in daily operations as the “Computerized Maintenance Management System (CMMS)” for reporting and inventory tracking.

1.1. As stated in paragraphs 12 and 15 of Attachment 1: Services of the *Facilities Management Service Agreement between The University of North Carolina at Charlotte and the University of North Carolina at Chapel Hill and North Carolina State University*, all Preventive

Maintenance and Corrective Maintenance including the billing of services and labor pertaining to Kannapolis Zone 7 for work request completion will be tracked and documented.

1.2. The Archibus Web Central system designed for Kannapolis will be utilized to track and document all Zone 7 work request completion and billing of services, materials and labor, if any, that is incurred.

1.3. As indicated in the services agreement, Paragraph 15 of Attachment 1: Services, an SOP is provided as a standard system guideline documenting system operations and work flows for equipment management, routine work requests and preventive maintenance for Zone 7 personnel and the NCRC.

2. Kannapolis Archibus Training. As part of the initial Archibus Kannapolis Zone 7 installation, Facilities Information Systems (FIS) Management will provide training for the Kannapolis departmental Customer/FAMs who have been designated by each Kannapolis department.

2.1. Initial Training will be performed by the FIS office utilizing hands-on practice and Archibus Kannapolis Zone 7 Standard Operating Procedure.

2.2. Continued training will be conducted by Zone 7 Supervisor and Processing Assistant.

3. Problems. Any system problems will first be reported to the Zone 7 PA and Supervisor; they will identify and any convey problems to FIS personnel. FIS will review problems and relay any discoveries to the Zone 7 Supervisor/PA.

4. Archibus Upgrades. Kannapolis Zone 7 will perform communication as the point of contact to Kannapolis Customers and FAMs for outages and upgrades.

5. Additional Training and/or Developments. For additional training and or development changes requested by Kannapolis Campus, FIS will provide a proposal of scope and budget to cover all costs to (Contact position for Kannapolis Campus—Maintenance and Operations Director, Zone A Manager, Zone 7 Supervisor).

6. Space Management. FIS will utilize Archibus Space Management Modules for the sole purpose of maintaining up-to-date inventory of space where Zone 7 will be providing maintenance service. Space information will only include building code, room number, floor number and associated square footage. Zone 7 Supervisor will report to FIS concerning any space floor plan changes.

7. This SOP will be reviewed by the Kannapolis work group on a bi-annual basis.

