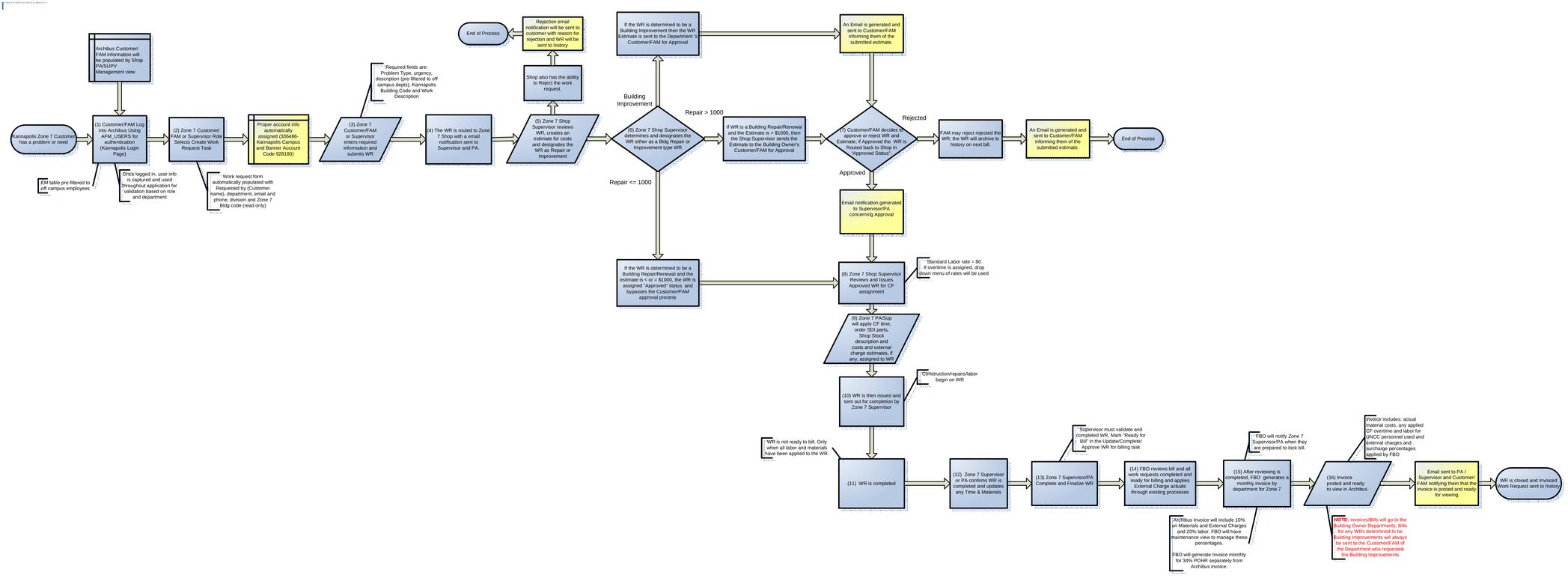
Kannapolis Zone 7 Customer has a problem or need
Archibus Customer/ FAM information will be populated by Shop PA/SUPV Management view
(1) Customer/FAM Log into Archibus Using AFM_USERS for authentication (Kannapolis Login Page)
EM table pre-filtered to off campus employees
Once logged in, user info is captured and used throughout application for validation based on role and department
(2) Zone 7 Customer/ FAM or Supervisor Role Selects Create Work Request Task
Work request form automatically populated with Requested by (Customer name), department, email and phone, division and Zone 7 Bldg code (read only)
Proper account info automatically assigned (336485- Kannapolis Campus and Banner Account Code 928180)
(3) Zone 7 Customer/FAM or Supervisor enters required information and submits WR
Required fields are: Problem Type, urgency, description (pre-filtered to off campus depts), Kannapolis Building Code and Work Description
(4) The WR is routed to Zone 7 Shop with a email notification sent to Supervisor and PA.
(5) Zone 7 Shop Supervisor reviews WR, creates an estimate for costs and designates the WR as Repair or Improvement.
Shop also has the ability to Reject the work request.
Rejection email notification will be sent to customer with reason for rejection and WR will be sent to history
End of Process
(6) Zone 7 Shop Supervisor determines and designates the WR either as a Bldg Repair or Improvement type WR
Building Improvement
If the WR is determined to be a Building Improvement then the WR Estimate is sent to the Department's Customer/FAM for Approval
An Email is generated and sent to Customer/FAM informing them of the submitted estimate.
Repair > 1000
If WR is a Building Repair/Renewal and the Estimate is > $1000, then the Shop Supervisor sends the Estimate to the Building Owner's Customer/FAM for Approval
(7) Customer/FAM decides to approve or reject WR and Estimate; if Approved the WR is Routed back to Shop in "Approved Status"
Rejected
FAM may reject rejected the WR; the WR will archive to history on next bill.
An Email is generated and sent to Customer/FAM informing them of the submitted estimate.
End of Process
Approved
Email notification generated to Supervisor/PA concerning Approval
Repair <= 1000
If the WR is determined to be a Building Repair/Renewal and the estimate is < or = $1000, the WR is assigned "Approved" status and bypasses the Customer/FAM approval process
(8) Zone 7 Shop Supervisor Reviews and Issues Approved WR for CF assignment
Standard Labor rate = $0 If overtime is assigned, drop down menu of rates will be used
(9) Zone 7 PA/Sup will apply CF time, order SDI parts, Shop Stock description and costs and external charge estimates, if any, assigned to WR
(10) WR is then issued and sent out for completion by Zone 7 Supervisor
Construction/repairs/labor begin on WR
"WR is not ready to bill. Only when all labor and materials have been applied to the WR
(11) WR is completed
(12) Zone 7 Supervisor or PA confirms WR is completed and updates any Time & Materials
(13) Zone 7 Supervisor/PA Complete and Finalize WR
Supervisor must validate and completed WR, Mark "Ready for Bill" in the Update/Complete/ Approve WR for billing task
(14) FBO reviews bill and all work requests completed and ready for billing and applies External Charge actuals through existing processes
(15) After reviewing is completed, FBO generates a monthly invoice by department for Zone 7
FBO will notify Zone 7 Supervisor/PA when they are prepared to lock bill.
Archibus Invoice will include 10% on Materials and External Charges and 20% labor. FBO will have maintenance view to manage these percentages.
FBO will generate Invoice monthly for 34% POHR separately from Archibus invoice.
(16) Invoice posted and ready to view in Archibus
Invoice includes: actual material costs, any applied CF overtime and labor for UNCC personnel used and external charges and surcharge percentages applied by FBO
NOTE: invoices/Bills will go to the Building Owner Departments; Bills for any WRs determined to be Building Improvements will always be sent to the Customer/FAM of the Department who requested the Building Improvements
Email sent to PA / Supervisor and Customer/ FAM notifying them that the invoice is posted and ready for viewing
WR is closed and Invoiced/ Work Request sent to history