

Project Request Tutorial

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ARCHIBUS Web Central provides University faculty and staff access to the Facilities Management (FM) process that assures all **Work Requests** and **Project Requests** receive the quickest possible attention and follow through. The process uses automated electronic systems for tracking each type of request.

Tutorials are provided to help our University customers understand the various processes related to work and project requests, and to help move the appropriate request type forward as quickly as possible. ARCHIBUS Web Central enables our customers to track the progress of each request. A Glossary of important terms used in each tutorial is attached to the page where the term is used. The Glossary is provided to clarify the meaning of a term used in the tutorials where that term may carry multiple meanings in a dictionary or reference manual.

The tutorials are not useful to anyone attempting to understanding how **ARCHIBUS Web Central** works. Advanced training is required for significant users needing to interact with the web based system beyond a simple non-reimbursable work request. There is a **HELP** link within ARCHIBUS Web Central to refresh a trained individual's understanding of the system.

It is not necessary for our customers to read or understand all of the Work and Project Request Tutorials from start to finish, but there may be parts of either tutorial that a customer wants to understand better. This better understanding may allow a customer to help expedite a request through the system. It is rare that any two requests will be identical from start to finish; there are many variables in the maintenance and construction process. No assumptions should be made about any individual request.

The process is web based allowing Facilities Management (FM) to serve all of our customers more efficiently, while providing a level of information tracking for each request, and reducing the need for hard copy approvals and paper trails.

There are two distinct types of requests associated with **ARCHIBUS Web Central**:

1. **Work Request**
2. **Project Request**

Knowing which type of request is best suited for a customer's need will expedite the entire process. Knowing which type of request to use depends on only a few important requirements contained in the request.

The **Sign In** screen provides two short definitions that describe in general terms the two types of requests. These definitions are intended to help direct each customer to the most efficient process for their specific need. Typically, the more informed a customer is with each request type, the more likely the correct request type will be used resulting in less time to achieve intended results. If a customer unintentionally chooses the wrong request type, it must be reentered into ARCHIBUS Web Central using the correct request type.

The following information is provided to clarify the **Project Request Process**:

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Glossary

ARCHIBUS Web Central:

ARCHIBUS Web Central has several uses for our customers and Facilities Management (FM). Entering and sending **Work Requests** and **Project Requests** to Facilities Management are two significant uses. ARCHIBUS Web Central is now the only means afforded to our customers for entering standard work and project requests. Requests related to emergencies are not to be sent using ARCHIBUS Web Central. In general, all faculty and staff have access to ARCHIBUS Web Central to varying degrees depending on the level of authorization given to our campus customers.

1. Work Request:

There are two types of Work Requests:

- a. Requests for basic maintenance of the facility to keep it operational and safe.
- b. Billable work that is under \$2,500.00 and generally involves only one trade.

Examples include: after hours housekeeping, shelving construction, hanging items on walls, simple painting, chair and desk repairs, assistance with activities on weekends and evenings.

2. Project Request:

This is for major work involving a larger scope than that of a Work Request. Projects often involve more than one trade and sometimes outside contractors and suppliers.

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PROJECT REQUEST PROCESS

I. PROJECT REQUEST DEFINED - INFORMAL PROJECTS

Projects (**Informal Projects**) generally involve a larger scope of work than Work Requests. Projects often involve more than one Shop or trade and many times involve outside contractors and suppliers.

All **Informal Projects** must follow set process requirements that have been established by the State of North Carolina and augmented by the University.

The current list of Informal Projects received by Facilities Management (FM) is larger than Design Services can accomplish in one fiscal year. The University, through the Vice-Chancellors, currently prioritizes all Informal Projects with the intent to accomplish the greatest number with the greatest need using the **Project Priority Process**. The process includes a **Project Priority List** containing all active Informal Projects received by FM. The List is within **ARCHIBUS Web Central** for review and printing. The Priority List includes a **Project Status Block** column that provides general descriptions on the progress of all projects. The Glossary on Page 6 of 6 contains the definitions for each progress description.

All Projects receive a **Priority** of **0** upon their inception by the customer and move through a prioritization process that includes both web based automation and human intervention. More detail is provided later in the tutorial.

Customers can help expedite the Project Request Process related to their own projects if they know the **Budget** or **Project Dollar Maximum** for a project.

All Informal Projects include an **Administrative Fee** starting with a **Project Initiation Fee (PIF)**. To fully comprehend when and how the fee is calculated, an understanding of the full **Design and Construction Process** is required; additional information on the Design and Construction Process is provided later in the tutorial.

The customer's account will be charged the larger of a **3% Administrative Fee** for each Informal Project assessed on the total final **Project Construction Cost** or a **\$300 Project Initiation Fee (PIF)**.

- A. The **\$300 Project Initiation Fee (PIF)** is encumbered at **Project Inception** and is the minimum Administrative Fee for any project. The Administrative Fee is limited to but not less than the (PIF) if the Project is cancelled by the customer prior to the start of the Design Phase.
- B. If the Project is cancelled after the start of the Design Phase, but prior to the start of the Construction Phase, the 3% Administrative Fee shall be assessed on the **Project Construction Estimate** provided by Design Services.

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Project Priority Process:

There are six **Project Priority** levels: **0, 5, 4, 3, 2** and **1**.

Priority 0: Customer has issued a Project Request to Design Services: **Project Inception**.

Priority 5: **Scope and Budget Manager** has completed and issued the Scope and Budget to the customer for review and approval.

Priority 4: Customer has approved the Scope and Budget documents.

Priority 3: Priority not assigned (future use).

Priority 2: Complete project construction before the start of fall classes.

Priority 1: Complete project construction before the end of the current fiscal year.

The **Project Priority** level does not establish the start of the **Design Phase**.

Budget: **Project Dollar Maximum**

- a. The amount of money that is assigned to, allocated to or available for a particular purpose (a budget is generally established by the customer or owner).

Estimate: **Project Construction Estimate**

- a. A preliminary calculation of the cost to perform a specific amount of work (an estimate is generally developed by a knowledgeable party not performing the work).

Cost: **Project Construction Cost**

- a. The total sum of money spent to perform a previously specified amount of work (the cost is generally known only after all work has been performed).

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II. DESIGN AND CONSTRUCTION PROCESS

The design and construction process has a structure to help the customer define, understand, and achieve expected results. The structure is also in place to help control costs and schedule. There are several areas within the structure where an uninformed customer may experience difficulties. This process tutorial is to help our customers understand the key areas of the structure that impact them the most, to help them understand how and when they may best achieve their expected project results and how they may best control costs and schedule.

Projects require design time including internal code review and analysis followed by final plan review and code approval time at the Department of Insurance (DOI) in Raleigh, NC. Design Services is responsible to the University for a code approved design.

The design phase can be performed in-house by using the staff of Design Services directly or by using an outside design consultant. If the design phase is performed by using an outside consultant, the cost of the consultant is paid for by the customer. The customer may need outside design consulting services for several reasons:

- Customer requires a level of design, consultation and service that Design Services does not provide.
- Design Services is not able to address the project on a schedule required by the customer. A customer's schedule constraint is not always resolved by outside design consultants. A staff member of Design Services must always be a part of the design process to meet University and State of North Carolina mandates.

The design and construction process has a minimum of seven key steps that must be followed in the established order to achieve the desired results. Jumping ahead generally causes cost and schedule increases. Integral to these steps is the **Project Priority Process**. The process includes a **Project Priority List** containing all active Informal Projects received by FM. The **List** is within **ARCHIBUS Web Central** for review and printing. The **List** includes two priority columns: (1) **Campus Priority**, and (2) **Process Status** (see the attached Glossary).

There are six **Project Priority** levels: **0**, **5**, **4**, **3**, **2** and **1**.

- Priority 0:** Customer has issued a Project Request to Design Services: **Project Inception**.
- Priority 5:** **Scope and Budget Manager** has completed and issued the Scope and Budget to the customer for review and approval.
- Priority 4:** Customer has approved the Scope and Budget documents.
- Priority 3:** Priority not assigned (future use).
- Priority 2:** Complete project construction before start of fall classes.
- Priority 1:** Complete project construction before end of the current fiscal year.

The **Project Priority** does not establish the start of the **Design Phase**.

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Glossary

1. Campus Priority:

The **Campus Priority** provides the priority level established by the Vice Chancellors during the priority review meetings held early in each fiscal year related to the projects listed for review at the time of the meetings.

The **Campus Priority** column will be **blank** if **no priority** was given to proceed with design to allow construction completion before the end of the current fiscal year or before the start of classes in the coming fall semester.

The **Campus Priority** column will contain a **1** or **2** if **priority** was given to proceed with the design to allow construction completion before the end of the current fiscal year or before the start of classes in the coming fall semester.

2. Process Status:

The **Process Status** provides the entire step by step change of priority levels that an Informal Project experiences within ARCHIBUS Web Central.

The **Process Status** column will start with **0** and move through **5** and **4** up to **1** or **2** allowing the customer to review the priority level that their individual project has actually achieved within the design process at the time of their review of the **Project List**.

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II. DESIGN AND CONSTRUCTION PROCESS

CONTINUED

A. Project Inception:

Customer defines a specific project need. The Project is automatically assigned a **Control Code** (letter and number combination) to simplify project communication. The **Control Code** will follow the project from start to finish. A **Project Priority of 0** is immediately established.

The customer provides the following:

- a. Written description of the intended final project result including known equipment specifications.
- b. Area or rooms effected by the change.
- c. When project can start, must start or by when it must be completed.
- d. Special conditions such as occupants, furnishings, move requirements.
- e. Budget constrains, available funding, special funding conditions.
- f. A single point of contact to Design Services.

Project inception is the full responsibility of the customer. However, once the Scope and Budget Manager is engaged, the Manager may be able to assist the customer with scope definition on complex projects. A **\$300 Project Initiation Fee (PIF)** is encumbered at **Project Inception**.

B. Scope and Budget Phase:

Customer and an assigned **Scope and Budget Manager** interact to either:

1. Establish a scope tied to a specific **budget** provided by the customer, or
2. Develop a **budget** by the Scope and Budget Manager after confirming the customer's needs (scope).

Method 1. More efficient.

Method 2. Customer is not limited by funding or does not know how much funding is available.

Upon sending the Scope and Budget to the customer for review, the **Project Priority** changes to **5** and a formal **Project Number** is assigned to the project. Upon customer approval of the Scope and Budget the **Project Priority** changes to **4**.

The Scope and Budget Phase is intended to expedite the process into the more formal Design Phase; it is not intended to be a substitute for the Design Phase nor a method to query whether a project can be re-scoped to meet available funds.

C. Design Phase:

This phase is the responsibility of both the designer and the customer in close communication:

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Control Code:

The Control Code is typically a two letter and three number combination that will follow the project request from start to finish. It is automatically assigned at Project Inception and can be used to track all active projects on the Project Priority List. The Control Code references and organizes all Project Requests and is maintained even after a Project Number is assigned.

Project Number:

The Project Number is assigned by Design Services after the Scope & Budget documents have been developed for review by the customer. The Project Number is used to track all Project costs and funding accounts.

Budget: Project Dollar Maximum

- a. The amount of money that is assigned to, allocated to or available for a particular purpose (a budget is generally established by the customer or owner).

Project Priority Process:

There are six **Project Priority** levels: **0, 5, 4, 3, 2** and **1**.

Priority 0: Customer has issued a Project Request to Design Services: **Project Inception**.

Priority 5: **Scope and Budget Manager** has completed and issued the Scope and Budget to the customer for review and approval.

Priority 4: Customer has approved the Scope and Budget documents.

Priority 3: Priority not assigned (future use).

Priority 2: Complete project construction before the start of fall classes.

Priority 1: Complete project construction before the end of the current fiscal year.

The **Project Priority** level does not establish the start of the **Design Phase**.

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II. DESIGN AND CONSTRUCTION PROCESS

CONTINUED

C. Design Phase: continued

Customer and Designer interact to establish an acceptable design at an acceptable **Project Construction Estimate**. Customer must provide approval to move into the **Procurement and Bidding Phase** and ultimately into the **Construction Phase**. Approval occurs at approximately 80% of the completed design (design plans and project construction estimate are complete, but details of design and specifications are not yet complete).

1. Designer Responsibilities:

- a. Pose thoughtful questions to the customer that require responses related to the expected final results of the project.
- b. Generate design alternatives (concepts) for customer review.
- c. Gain agreement to move forward with the final concept. Once a final concept is adopted, the Project Coordinator establishes an estimated design completion date (see ARCHIBUS Web Central).
- d. Develop the concept to a level allowing a **Project Construction Estimate** to be generated for review and approval.
- e. Upon approval of the estimate tied to the final concept, complete the construction documents including specifications.
- f. Issue documents to the Department of Insurance for review.
- g. Move the project into the procurement or bidding phase.
- h. Move the project into the construction phase and establish an estimated construction completion date (see ARCHIBUS Web Central).
- i. Monitor the project during construction and update the customer on construction progress and project costs (see ARCHIBUS Web Central).
- j. Provide amendments in a timely manner for customer review and approval.
- k. Assure completion and closeout of the project.
- l. Assure final billing and payment.

2. Customer Responsibilities:

- a. Provide a single point of contact for all discussions and approvals.
- b. Provide a **Budget** or allow a budget tied to a scope of work to be established.
- c. Make timely decisions in your interest to complete the project on a reasonable schedule.
- d. Understand that established design and construction processes are in place for the best interest of the University.
- e. The total final **Project Construction Cost** for the work may be less or more than the **Project Construction Estimate** or **Bid**.
- f. The **Project Construction Cost** is borne by the customer.

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Procurement and Bidding Phase:

Facilities Management (FM) Shops proceed to "buy out" materials for the project or outside contractors provide bids based on approved contract documents.

Construction Phase:

Project construction starts after (FM) Shops have moved forward with their material procurement process, or after approval of the bidding process and contract award to an outside contractor.

Budget: Project Dollar Maximum

- a. The amount of money that is assigned to, allocated to or available for a particular purpose (a budget is generally established by the customer or owner).

Estimate: Project Construction Estimate

- a. A preliminary calculation of the cost to perform a specific amount of work (an estimate is generally developed by a knowledgeable party not performing the work).

Bid:

- a. A proposal for compensation to perform a specific amount of work (the bid is generally developed by the party performing the work).

Cost: Project Construction Cost

- a. The total sum of money spent to perform a previously specified amount of work (the cost is generally known only after all work has been performed).

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II. DESIGN AND CONSTRUCTION PROCESS

CONTINUED

C. Design Phase: continued

3. Cost Control - Definitions:

Budget: Project Dollar Maximum

- a. The amount of money that is assigned to, allocated to or available for a particular purpose (a budget is generally established by the customer or owner).

Estimate: Project Construction Estimate

- a. A preliminary calculation of the cost to perform a specific amount of work (an estimate is generally developed by a knowledgeable party not performing the work).
- b. An approximation of the probable construction cost.
- c. A tentative statement of probable construction cost.
- d. The anticipated cost of materials, labor, equipment or any combination of these for a proposed construction project.
- e. The anticipated approximate cost of construction.

Bid:

- a. A proposal for compensation to perform a specific amount of work (the bid is generally developed by the party performing the work).
- b. A proposed price for a contract to perform a specified amount of work or provide a specific service.
- c. A statement including an offered price for what it will entail to provide something that has been clearly defined.

Cost: Project Construction Cost

- a. The total sum of money spent to perform a previously specified amount of work (the cost is generally known only after all work has been performed).
- b. The total resulting expenditure to achieve the final desired objective.

D. Department of Insurance Review: Design Services issues documents to DOI for review and approval. All projects must gain final approval from the Department of Insurance.

E. Procurement and Bidding Phase: Facilities Management (FM) Shops proceed to "buy out" materials for the project or outside contractors provide bids based on approved contract documents.

F. Construction Phase: Project construction starts after (FM) Shops have moved forward with their material procurement process, or after approval of the bidding process and contract award to an outside contractor.

G. Close Out Phase: Review and approval of completed project by customer and Design Services. Final review and approval by Design Services of all invoices for payment.

END OF PROJECT REQUEST TUTORIAL

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Project Status Block: Definitions

All formal requests, submittals, reviews and approvals occur within ARCHIBUS Web Central.

1. Requested:

Customer's Project Account Manager has initiated a Project Request. Customer's Financial Account Manager has assigned, approved and submitted Index Fund Account and Banner Account Codes. A Control Code is assigned, and the Project Request shows on the Priority List.

2. Scope & Budget Requested:

The Office Manager for Design Services has assigned a Scope and Budget Manager for the Project.

3. Scope & Budget Review:

The Scope and Budget Manager has submitted to the customer for their review and approval the recommended budget tied to a defined scope of work for the project.

4. Approved Scope & Budget:

The customer has approved the scope and budget documents allowing the project to move into the comprehensive design process.

5. In Design:

A Project Coordinator has been assigned and the more comprehensive design process has started.

6. Design and Estimate Submitted:

The Project Coordinator has submitted the Project Construction Estimate and design documents for review and approval by the customer. The design is approximately 80% complete.

7. Approved Design and Estimate Submitted:

The customer has approved the Project Construction Estimate and design documents.

8. Approved by AVC - FM:

DOI Review:

The Design is complete and has been approved by the AVC - FM, or the project has been sent to DOI for approval.

9. In Construction:

Scheduling:

Bidding:

The Project has started construction, or is being scheduled for construction, or is going to bid through Materials Management.

10. Punch List:

Project construction is nearly complete; minor corrective work is on going; seeking final invoicing from suppliers and contractors.

11. Project Completed:

Ready for Billing:

12. Billing Complete:

Project Closed: