



Training Outline ARCHIBUS/FM Web Central For Informal Projects

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# **Process Description**

The present document describe, in general ways, some process and activities developed on ARCHIBUS/FM Web Central, to enter and manage the Informal Project process.

# Key Definitions and Concepts

- Definition A Project is a collection of drawings, graphic files, and database that holds a particular inventory. A project defines a project path – a project must be requested and approved before it can be implemented.
- Concept The ARCHIBUS/FM Project Management activity provides a web-based application for managing projects. This activity is used by a variety of users, including facilities managers, project managers, approving managers, executive managers, and vendors.





# Starting and Logging into ARCHIBUS/FM Web Central

- Launch your Internet Explore
- Enter the web address of the ARCHIBUS/FM Web Central http:\\BLD05.uncc.edu:8080
- Type your User Name and Password on the Login Page.

Welcome to ARC	CHIBUS/FM	Welcome Page language: English (United States) 💽 🖆
Your company's collabo	orative, enterprise environment for total facility and infrastructure management.	
	Select a project: UNCC Prod Project	
	Sign In         Sign in to your personalized list of activities and join the collaboration now.         Enter your user name:         [AFM_SUP]         Enter your password:         [•••         Forget your password? Click here.         [V] Remember my user name on this computer         Sign In	
	Be Our Guest If you don't have an account, use this selection to access your site's guest activi Guest Sign In	ties.

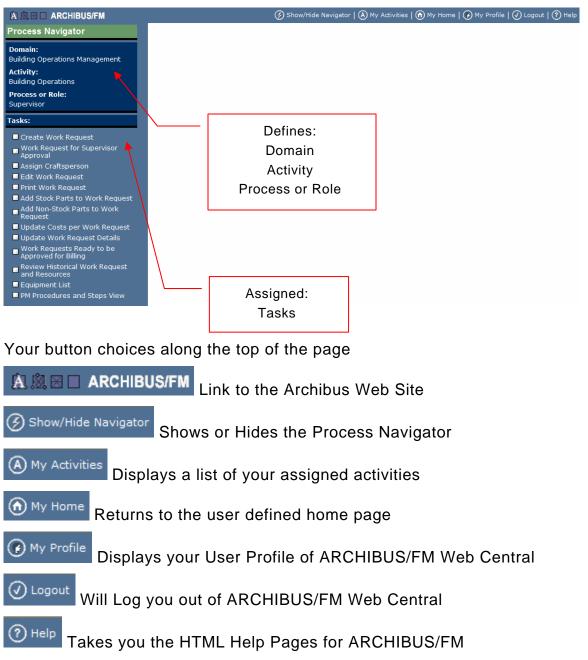
• Select the "Sign In" Button





# **Basic Navigation of ARCHIBUS/FM Web Central**

Once you have logged in you will see the follow screen in you browser.







### The Process Navigator

The Process Navigator is divided into two parts

The upper portion displays the Domain (or Module) you are working, the Activity class of the Domain you are working and the Process or Role you are using (in your case it is the Help Desk).

Process Navigator	
<b>Domain:</b> Project Management	۲
Activity: Project Management	
Process or Role: Project Coordinator	
Tasks:	

The lower portion displays your Tasks you are able to perform.

#### Tasks:

- Assign Kick-Off Meeting Date and Minutes
- Create or Edit Actions
- Monitor Work Requests Status by Action
- Route Project for Approval





## **Customer Tasks**

The selection of Customer Tasks are limited to the following:

#### Tasks:

- Create Project Request
- Edit Project Request
- Review Created Projects
- Review Requested and Withdrawn Projects
- Review Activated Projects
- Approve Project Request

Now we will discuss each of the Tasks one by one.





## **Create Project Request – Screen 1**

To create a Project Request, select "Create Project Request" under tasks in the "Process Navigator" and fill out the information on the form.



#### Below is the Create Project Request View.

A A - ARCHIBUS/FM		🔇 Show/Hide Navigator   🛞 My Activities   🕥 My Home   🕐 My Profile   🕑 Logout   🕥 Help
Process Navigator	Request Project	
Domain: Project Management Activity: Project Management Process or Role: Customer	Project Request Name*: UNCC TEST Project Discipline*: Move Requestor: EM_CUSTOMER Department Contact*: RARRIER, JAMES H Project Summary*: Test for UNCC	2
Tasks:		
Create Project Request     Edt Project Request     Review Created Projects     Review Requested and Withdrawn Projects     Review Activated Projects     Approve Project Request	Go To Next Step Cancel	





Note: The fields listed below are required in order to submit the request: Project Requested Name, Project Discipline, Department Contact and Project Summary.

<u>Fields</u>	<b>Description of Fields</b>
Project Request Name:	Name of the Project the request by the customer.
Project Discipline <u>:</u> 🗔	Type of Project that is being requested.
Requestor:	Name of the person requesting the project
Department Contact: 🗔	Department contact for the project.
Problem Location: 🗔	Location of Problem
Project Summary:	Describe the project requested

\*Red fields are required

Underlined are Auto-Completed Information

You will note that may fields have a 🛄 button beside the field. This button will allow you to select from a list of people, places and options when creating your Work request.

Go To Next Step

Once you select "Go to Next Step", it gives you a screen to add details to the project request.

Cancel

Clear the changes made to the Work Request in that screen.





## **Create Project Request – Screen 2**

To add detail to the Project Request, select "Go to Next Step" button on the initial "Create Project Request" screen.



The Create Project Request View appears similar to the sample screen below.

A 🛱 🖻 🗆 ARCHIBUS/FM				🕑 Show/	/Hide Navigator   🙆 M	ly Activities   🕥 My Home   🕐 My Profile   🖉 Logout   ⑦ Help
Process Navigator	roject Request Name*:	UNCC TEST		Project Request Code*:	0000013	
Domain: Project Management	equestor Phone:	4444-4444		Date Created:	December 1, 2006	
	ept. Contact Phone:			Department Contact:	BARRIER, JAMES H.	
Project Management Si Process or Role:	ite Code:			Building Code:	0003	
Customer D	ivision Code:			Department Code:		
Tasks: A	ccount Code*:	ACCOUNT_1		Program Name:		
- createrrojettrequent	mployees Affected:	0		Area Affected:	0.00	
Review created Projects	ate - Requested Start:	12/1/2006 December 1, 2006		Date - Requested End:	M/D/YYYY	
	ustomer Budget: commended)	20,000.00		Requestor:	EM_CUSTOMER	
Approve Project Request		st for UNCC			^	
P	roject Summary*:				×	
	T	st for UNCC			^	
Pi	roject Description*:				~	
	T	st for UNCC			^	
P	roject Scope*:					
					Y	
P	Te roject Benefit*:	st for UNCC			~	
					×	
	ſs	ave Cancel Withdra	w			
			_			



The fields below can be edited from this view:

Requestor's Phone:	Phone number of the requestor.				
Dept. Contact Phone:	Phone number of the Department Contact.				
Department Contact: 🗔	Department contact for the project				
Date – Requested Start:	Date the requestor would like to start the project				
Date – Requested End:	Date the requestor would like the project to end				
Employees Affected:	Employees that are being effected for by the project				
Area Affected:	Area that is affected by the project. (Square Feet)				
Customer Budget:	A budget number based on what the Customer estimates (This field is highly recommended by Design Services to be filled out)				
Project Summary:	Describe the project requested				
Project Description:	Detailed description of the project.				
Project Scope:	The overall scope of the project.				
Project Benefit:	The description of benefit to the project.				
Save	Saves the changes made to the Project Request				
	d changes the status to "Created".				
Cancel	Clear the changes made to the Project Request in that screen.				
Withdraw	If the Customer does not choose to create the Project, he/she may withdraw the request.				





# **Create Project Request Screen 3**

To review detail to the Project Request, select "Save" button on the detail "Create Project Request" screen.

Tasks: Create Project Request Edit Project Request Review Created Projects Review Requested and Withdrawn Projects Review Activated Projects Approve Project Request

The Create Project Request View appears similar to the sample screen below.

A 魚田 CHIBUS/FM		🕑 Show/Hide Navigator   🔕 My Activities   🕥 My Hame   🕐 My Profile   🖉 Logout   🕐 Help
Process Navigator		
	A Project Information This project Request Name: UNCC TEST Date Created: 12/1/2006 Department Contact: BARRIER, JAMES H. Customer Budget: 20,000.00 Date - Requested Start: 12/1/2006 Employees. Alfocted: 0 Site Code: Est. Review Date: 12/4/2006 Project Description: Test for UNCC Project Scope: Test for UNCC Project Benefit: Test for UNCC	Project Request Code:       0000013         Requestor:       EM_CUSTOMER         Account Code:       ACCOUNT_1         Date - Requested End:       0.00         Building Code:       0003         Project Status:       Created         Department Code:       Otop





# **Edit Project Requests**

To edit Project Request select, "Edit Project Request" on the Tasks portion of the Process Navigator. All of the created and requested projects are listed to the left console.

#### Tasks:

- Create Project Request
- 🗕 Edit Project Request 🛛 🧹
- Review Created Projects
- Review Requested and Withdrawn Projects
- Review Activated Projects
- Approve Project Request

This view works similar to the Create Project Request Screen 2.

▲ 燕 田 ■ ARCHIBUS/FM			¢	🗿 Show/Hide Navigati	or   🛞 My A	Activities   🙆 My Home   🤅	My Profile   🕗 Logout	🕐 Help
Process Navigator	Edit My Projects					O Net	v   🕜 Help   🗢 E-mail	🥥 Print
Domain:	My Created and Reque	sted Projects 2 Requery	Project Request Name*:	UNCC TEST		Project Request Code*:	0000013	
Activity:	Project Request Code	Project Request Name	Requestor Phone:	4444-4444		Date Created:	December 1, 2006	
Project Management Process or Role:	♦0000010 ♦0000011	STADIUM PAINTING KELLY TEST XXXXXXX	Dept. Contact Phone:			Department Contact:	BARRIER, JAMES H.	
Customer	♦0000012 ♦0000013	UNCC TEST	Site Code:			Building Code:	0003	
Tasks:			Division Code:			Department Code:		
Create Project Request			Account Code*:	ACCOUNT_1		Program Name:		
<ul> <li>Edit Project Request</li> <li>Review Created Projects</li> </ul>			Employees Affected:	0		Area Affected:	0.00	
<ul> <li>Review Requested and Withdrawn Projects</li> <li>Review Activated Projects</li> </ul>			Date - Requested Start:	12/1/2006 December 1, 2006		Date - Requested End:	M/D/YYYY	
Approve Project Request			Customer Budget: (Recommended)	20,000.00		Requestor:	EM_CUSTOMER	
			Project Summary*:	Test for UNCC			^	
							~	
				Test for UNCC			(A)	
			Project Description*:					
			and a second second second second second	Test for UNCC			0	
			Project Scope*:				4	
			1	Test for UNCC			^	
			Project Benefit*:					
							<u></u>	
			(	Save Cancel	Withdraw			

The fields below can be edited from this view:

 Requestor's Phone:
 Phone number of the requestor.

Dept. Contact Phone: Phone number of the Department Contact.

Department Contact: Department contact for the project

•	AOS Developments				
WE UNC CHARLOITE	Document for ARCHIBUS/FM Web Central				
	_				
Date – Requested Sta	rt: 🔤 Date the requestor would like to start the project				
Date – Requested End	Date the requestor would like the project to end				
Employees Affected:	Employees that are being effected for by the project				
Area Affected:	Area that is affected by the project. (Square Feet)				
Customer Budget:	A budget number based on what the Customer estimates (This field is highly recommended by Design Services to be filled out)				
Project Summary:	Describe the project requested				
Project Description:	Detailed description of the project.				
Project Scope:	The overall scope of the project.				
Project Benefit:	The description of benefit to the project.				
Save	Saves the changes made to the Project Request and changes the status to "Created".				
Cancel	Clear the changes made to the Project Request in that screen.				
Withdraw	If the Customer does not choose to create the Project, he/she may withdraw the request.				





### **Review Created Projects**

To review created Project Request select, "Review Created Projects" on the Tasks portion of the Process Navigator. All of the created and requested projects are listed to the left console.



Select the Project Request you wish to view and Print.

A A CHIBUS/FM			9	Show/Hide Navigator   🙆 My	Activities   🕥 My Home   🤇	My Profile   🖉 Logout   🕐 Help
Process Navigator	Edit My Projects				<b>O</b> Ne	w 🛛 🕜 Help 🛛 📀 E-mail 🛛 🞯 Print
Domain: Project Management	My Created and Reques	Project Request	A Projects Information This project has been Creat	ted.		₽
Activity: Project Management Process or Role: Customer	Request Code	Name LABORATORY MOVE ABSIS CONSULTING STADIUM PAINTING KELLY TEST	Project Request Name: Date Created: Department Contact: Customer Budget: Date - Requested Start:	12/1/2006 BARRIER, JAMES H. 20,000.00	Project Request Code: Requestor: Account Code: Date - Requested End: Area Affected:	0000013 EM_CUSTOMER ACCOUNT_1 0.00
Tasks: ✓ Create Project Request ✓ Edit Project Request	♦0000012 ♦0000013	X0000X UNCC TEST	Employees Affected: Site Code: Division Code: Est. Review Date:	0	Building Code: Project Status: Department Code:	0003 Created
Review Created Projects     Review Requested and Withdrawn Projects     Review Activated Projects     Review Activated Projects     Approve Project Request			Project Scope: Te	st for UNCC st for UNCC st for UNCC st for UNCC		

You can select Print on your browser. If you wish to create a PDF of the Project Request simply select the PDF Icon .





### **Review Requested and Withdrawn Projects**

To review Project Request select, "Review Requested and Withdrawn Projects" on the Tasks portion of the Process Navigator.

 Tasks:

 Create Project Request

 Edit Project Request

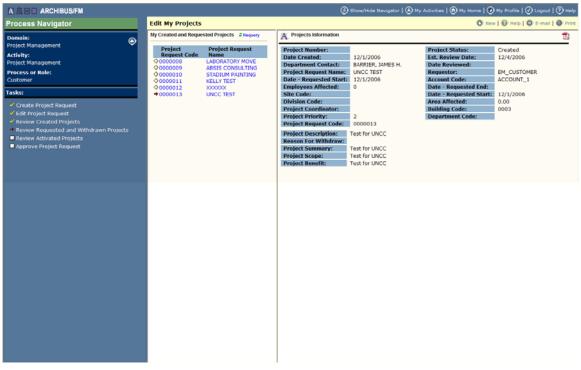
 Review Created Projects

 Review Requested and Withdrawn Projects

 Review Activated Projects

 Approve Project Request

Below is the Review Requested and Withdrawn Projects View.



You can select Print on your browser. If you wish to create a PDF of the Project Request simply select the PDF Icon





### **Review Activated Projects**

To review activated projects select, "Review Activated Projects" on the Tasks portion of the Process Navigator.



Below is the Add Non-stock Part to Work Request View.

A A - ARCHIBUS/FM		🕑 Show/Hide Na	ivigator   🕭 My Activities   🙆 My Home   📀	My Profile   🕗 Logout   🅐 Help
Process Navigator	Review Activated Projects		O New	🕜 Help   🥥 E-mail   🞯 Print
Domain:	Review Activated Projects 2 Requery	A. Projects Information		2
Domain: Project Management Activity: Project Management Process or Role: Customer Taske: * Create Project Request * Edit Project Request * Edit Project Request * Review Requested and Withdrawn Projects * Review Arbated Projects * Review Arbated Projects * Review Arbated Projects	Review Activated Projects 2 litegewy           Project         Project Request           Request         LABORATORY MOVE	Project Number: A00200601 Project Request Name: L400RATOR; Project Request Code: 000008 Dote Activedci: 11/30/2006 Est. Reviewed: 11/30/2006 Dote Reviewed: 11/30/2006 Dote Reviewed: 11/30/2006 Dote Reviewed: 11/30/2006 Dote Reviewed: EA_CCUNT_1 Project Description: Project Summary: Move the labor: Project Summary: Move the labor:	Employees Affected: Area Affected: Site Code: Building Code: Division Code: MES H. Department Code: ER Project Coordinator: Project Tority: Project Status:	





# Approve Project Request

To approve activated projects select, "Approve Project Request" on the Tasks portion of the Process Navigator.

Tasks:
Create Project Request
Edit Project Request
Review Created Projects
Review Requested and Withdrawn Projects
Review Activated Projects
🗖 Approve Project Request 🚽

#### Below is the Approve Project Request View.

A R ARCHIBUS/FM		(§) s	lhow/Hide Navigator   🕭 My A	ctivities   🙆 My Home   🕑 My	Profile   🕗 Logout   🕐 Help
Process Navigator	Approve Project Request				Show Clear
Domain: Project Management Activity: Project Management Process or Role: Office Manager	State: Divisio	tment:	Project: Project Type: Project: Manager: Statuses:	•••	
Tasks:					
Review Created Projects     Set and Request/Withdraw Project Request     Review Requested and Withdrawn Projects					
	Projects Routed for Approval 2 Requery	Project Information	Approve Reject		
Review Activated Projects Approve Project Request	Project Request Project Project Date	Use the buttons above to Ap Approval Level 1*:	Status:	Date Approved:	
	Code         Discipline         Priority         Created           ◆0000002         N/A         2         11/28/2006	Approval Level 2:	Not Reviewed Status: Not Reviewed	Date Approved:	
		Approval Level 3:	Status: Not Reviewed	Date Approved:	
		Comments:			< v
		Project Code:	0000002	Date Created:	2006-11-28
		Project Description:	×		
		Project Summary:	х		
			2	Date Requested:	2006-11-28
			EM_IPADMIN	Requestor Phone:	88888888
		Department Contact:	BAKER, ARZELLA Y.	Contact's Phone:	
		: Division Code:		Building Code: Account Code*:	ACCOUNT_1
		Department Code:		Department Name:	ACCOUNT_1
		Program Name:			
			0.00	Employees Affected:	0
		Project Benefit*:	x	Project Scope*:	x
		Date - Requested Start:	November 28, 2006	Date - Requested End:	
		Days Per Week:	5	Customer Budget:	0.00
	< >				

There are 3 levels of approval. The customer has the second level of approval after the Design Supervisor.

Approve Select this button to approve the project.

Select this button to reject the project.

Reject





### Office Manager/Design Supervisor Tasks

The selection of Office Manager/Design Supervisor Tasks are limited to the following:

Tasks:

- Review Created Projects
- Edit and Request/Withdraw Project Request
- Review Requested and Withdrawn Projects
- Change Project Priority
- Review Activated Projects
- Approve Project Request

Now we will discuss each of the Tasks one by one.





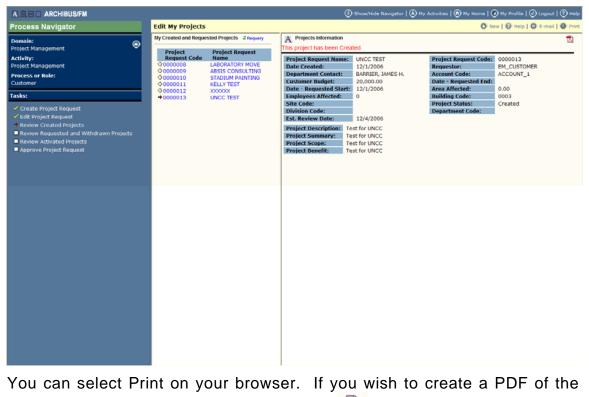
### **Review Created Projects**

To review created Project Request select, "Review Created Projects" on the Tasks portion of the Process Navigator. All of the created and requested projects are listed to the left console.

#### Tasks:

- Review Created Projects
- Edit and Request/Withdraw Project Request
- Review Requested and Withdrawn Projects
- Change Project Priority
- Review Activated Projects
- Approve Project Request

Select the Project Request you wish to view and Print.



Project Request simply select the PDF Icon





# Edit and Request/Withdraw Project Request

To edit the Project Request, select "Edit and Request/Withdraw Project Request" on the Tasks portion of the Process Navigator.

#### Tasks:

- Review Created Projects
- Edit and Request/Withdraw Project Request
- Review Requested and Withdrawn Projects
- Change Project Priority
- Review Activated Projects
- Approve Project Request

Below is the Edit and Request/Withdraw Project Request View

The fields below can be edited from this view:

Project Name:Assigns the project name given by Design<br/>Services.Project Number:Assigns the project number given by Design<br/>Services

Department Contact Phone: Department contact for the project

UNC (HARIOTTE	AOS Developments IP Document for ARCHIBUS/FM Web Central		
Building Code:	Building the project will happen in.		
Design Budget:	Design Services overall budget estimate		
Project Coordinator:	Assigns the project manager to the project		
Priority:	Assigns project priority based the lowest default project priority. Default value is 2. You can select 2-10.		
Save	Saves the changes made to the Project Request and the status does not change.		
Cancel	Clear the changes made to the Project Request in that screen.		
Withdraw	If the Office Manager does not choose to create the Project, he/she may withdraw the request. This will bring up a dialog box and will ask for a reason for withdraw and will record the reason with the project request. This will change the status to "Withdrawn"		
Request	If the Office Manager wants to accept the Project, he/she may request the request. This changes the status to "Requested."		





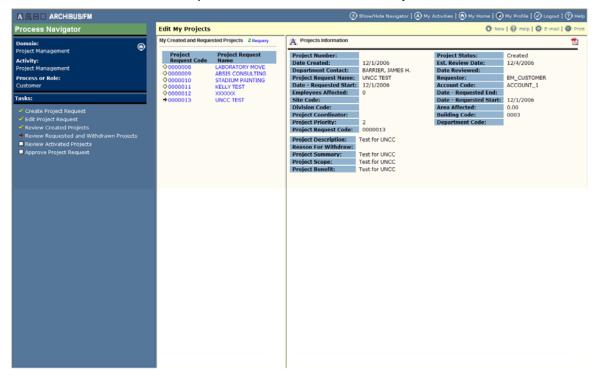
### **Review Requested and Withdrawn Projects**

To review Project Request select, "Review Requested and Withdrawn Projects" on the Tasks portion of the Process Navigator.



Approve Project Request

Below is the Review Requested and Withdrawn Projects View.



You can select Print on your browser. If you wish to create a PDF of the Project Request simply select the PDF Icon.



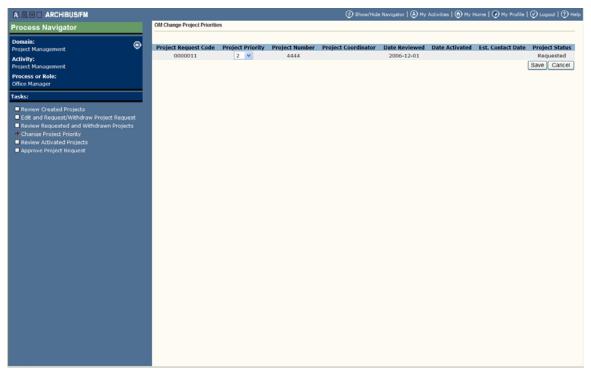


# Change Project Priority

To change priorities for the projects, select "Change Project Priorities" on the Tasks portion of the Process Navigator.

Tasks:	
Review Created Projects	
Edit and Request/Withdraw Project Request	
Review Requested and Withdrawn Projects	
🗆 Change Project Priority 🚽	
Review Activated Projects	
Approve Project Request	

Below is the Change Project Priorities view.



This view allows the Office Manager to update project priorities. If the project is changed to a priority1 the field "Date Activated" will be populated.

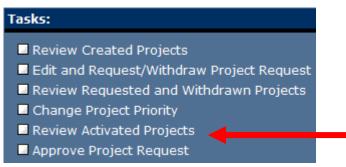
NCCHARIOTTE	AOS Developments IP Document for ARCHIBUS/FM Web Central	AOS
Save	Saves the changes made t and the status does not char	
Cancel	Clear the changes made to that screen.	the Project Priority in



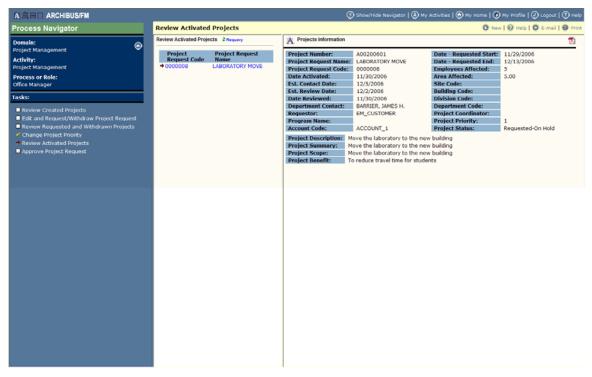


### **Review Activated Projects**

To view activated projects, select "Review Activated Projects" on the Tasks portion of the Process Navigator.



Below is the Review Acitvated Projects view.



You can select Print on your browser. If you wish to create a PDF of the Project Request simply select the PDF Icon.





# **Approve Project Request**

To approve activated projects select, "Approve Project Request" on the Tasks portion of the Process Navigator.

#### Tasks:

- Review Created Projects
- Edit and Request/Withdraw Project Request
- Review Requested and Withdrawn Projects
- Change Project Priority
- Review Activated Projects
- Approve Project Request

#### Below is the Approve Project Request View.

A 🛝 🗉 🗖 ARCHIBUS/FM		@ s	Show/Hide Navigator   🕭 My A	uctivities   🙆 My Home   🕑 My	Profile   🕗 Logout   🕐 Help
Process Navigator	Approve Project Request				Show Clear
Domain: Project Management Activity: Process or Role: Office Manager	State: Divisio City: Depar	tment:	Project: Project Type: Project: Manager: Statuses:	  	
Tasks:					
Review Created Projects     Git and Request/Withdraw Project Request     Review Requested and Withdrawn Projects     Gramma Comparison (Comparison (Compariso					
Change Project Priority     Review Activated Projects	Projects Routed for Approval 2 Requery	Project Information	Approve Reject		
Approve Project Request	Project	Use the buttons above to Ap Approval Level 1*:	Status:	Date Approved:	
	Request Project Project Date Code Discipline Priority Created				
	+0000002 N/A 2 11/28/2006	Approval Level 2:	Status:	Date Approved:	
		EM_IPADMIN Approval Level 3:	Not Reviewed Status:	Date Approved:	
		JONES, JR., PHILIP M.	Not Reviewed	outer approved.	
		Comments:			< >
			,		
		Project Code:	000002	Date Created:	2006-11-28
		Project Description:	×		
		Project Summary:	x		
		Project Priority:	2	Date Requested:	2006-11-28
		Requestor:	EM_IPADMIN	Requestor Phone:	88888888
		Department Contact:	BAKER, ARZELLA Y.	Contact's Phone:	
		:		Building Code:	
		Division Code:		Account Code*:	ACCOUNT_1
		Department Code:		Department Name:	
		Program Name:			
		Area Affected:	0.00	Employees Affected:	0
		Project Benefit*:	X Neuromber 20, 2006	Project Scope*:	x
		Date - Requested Start: Days Per Week:	November 28, 2006	Date - Requested End: Customer Budget:	0.00
		Days Per Week:		Customer budget:	0.00
	<				

There are 3 levels of approval. The Office Manager / Design Supervisor have the first level of approval before the Design Supervisor.

Approve

Select this button to approve the project.

Reject

Select this button to reject the project.





### **Project Coordinator Tasks**

The selection of Project Coordinator Tasks are limited to the following:

#### Tasks:

- Assign Kick-Off Meeting Date and Minutes
- Create or Edit Actions
- Monitor Work Requests Status by Action
- Route Project for Approval

Now we will discuss each of the Tasks one by one.





# Assign Kick-Off Meeting Date and Minutes

To assign Kick-Off Meeting minutes and date select, "Assign Kick-Off Meeting Date and Minutes" on the Tasks portion of the Process Navigator. All of the created and requested projects are listed to the left console.

#### Tasks:

- Assign Kick-Off Meeting Date and Minutes
- Create or Edit Actions
- Monitor Work Requests Status by Action
- Route Project for Approval

Below is the Assign Kick-Off Meeting Date and Minutes View.

A 息回 ARCHIBUS/FM	🕜 Show/Hide Navigator   🔕 My Activities   🕥 My Home   🕐 My Profile   🖉 Logout   🕐 Help
Process Navigator	Edit My Projects 3 Alter   3 New   3 Help   3 E-mail   3 Print
Domain: Project Management Activity:	My Created and Requested Project         2 Request           Project         Project Information: 000001           Project         Project Number:         Project Name:           X         Kick - Off - Date:
Project Management	Request Code Name Project Hamber: Project Hamber: A Rick Off Date: MM00/YYYY
Process or Role: Project Coordinator	O000001         X         Date Activated:         Est Contact Date:           0000002         X         Est Review Date:         Date Reviewed:         Project Document:         Browse_
Tasks:	0000004 TEST     0000005 NEW AUDITORIUM Project Description:
Assign Kick-Off Meeting Date and Minutes     Create or Edit Actions     Monitor Work Requests Status by Action     Route Project for Approval	0000006     XXXX     Image: Constraint of the con
	Project Scope: X Project Scope: X Project Benefict: Project Coordinator: 2 Project Status: Requested-Routed Estimated Save Cancel

The fields below can be edited from this view:

Kick-Off Meeting Date: 🗔	Enter in the date that the initial kick-off
	meeting took place.

Project Document:

Attach the meeting minute document file to the project request

WCCHARIOTTE	AOS Developments IP Document for ARCHIBUS/FM Web Central
Estimate	Once the meeting information is filled out than the Project Coordinator can select the Estimate button. This changes the status to Requested- Estimated.
Save	Saves the changes made to the view and the status does not change status.
Cancel	Clear the changes made to the view in that screen.





### **Create or Edit Actions**

To create and edit actions from your estimate select, "Create or Edit Actions" on the Tasks portion of the Process Navigator.

#### Tasks:

- Assign Kick-Off Meeting Date and Minutes
- Create or Edit Actions
- Monitor Work Requests Status by Action
- Route Project for Approval

#### Below is the Create or Edit Actions View.

A R B ARCHIBUS/FM		🚱 Show/Hide Navigator   🕭 My Ac	tivities   🙆 My Home   🕜 My Profile   🖉 Logout   🤭 Help
Process Navigator	Create or Edit Actions		🕲 Alter   🔘 New   🕖 Help   🛇 E-mail   🔗 Print
Domain: Project Management Activity: Project Management Process or Role:	Project Project Request Code Project Request Name No Itama.	Actions: 25 Project ID: Action Item ID: Shop / Zone Code:	25 F8000
Project Coordinator		Est-Labor Hours:	0
Tasks:		Est-Labor Cost:	15.00
<ul> <li>Assign Kick-Off Meeting Date and Minutes</li> <li>Create or Edit Actions</li> </ul>		Est-Cost of Materials:	
Monitor Work Requests Status by Action		Est-Cost of Contract:	20.00
Route Project for Approval	Action 2Requery	Est. Total for Action:	Update Total
		Save Add Action	Cancel
	Action Item ID Project Request Code Status 25 N/A		
	26 N/A     27 N/A		

Once you have your estimates from the shops and you have created your estimate workbook then you can create an action per shop with your estimates.

The fields below can be edited from this view:

Est. Labor Hours: The estimated number of hours the Shop/Zone will work on the project.

Est. Labor Cost: The estimated cost of labor for the project.

WCCHARLOTTE	AOS Developments IP Document for ARCHIBUS/FM Web Central	AOS
Est. Cost of Materials Est. Cost of Contract Est. Total for Action	The estimated cost of materi The estimated cost of contra The field is automatical Update Total button.	ict.
Save Add Action Cancel	Saves the changes made to This button adds a blank f add a new action. Clear the changes made screen.	orm so that you can





## Monitor Work Request Status by Action

To review Actions by Work Request select, "Review Work Request Status by Action" on the Tasks portion of the Process Navigator

#### Tasks:

- Assign Kick-Off Meeting Date and Minutes
- Create or Edit Actions
- Monitor Work Requests Status by Action
- Route Project for Approval

Below is the Monitor Work Request by Action View.

Process Navigator	View	View Work Request by Action					3 Alter   O New   9 Help   O E-mail   6		
Domain: Project Management Activity: Project Management		Action Items @Requery					Work Requests: 2006000013		
		Project Request Name	Project Name	Project Request Code	Project Number	Action Item ID	Work Request Code Problem Type	2006000013 EL-FIREALARM	
rocess or Role:		NEW	TEST	0000005	2122	21	Work Request Status	R	
roject Coordinator		NEW	TEST	0000005	2122	24	Requested by	EM_IPADMIN	
asks:		AUDITORIUM	TEST	0000000		25	Requestor's Phone #	88888888	
Assign Kick-Off Meeting Date and Minutes						26	Building Code		
Create or Edit Actions	ŏ					27	Floor Code		
Monitor Work Requests Status by Action		×		0000001		28	Room Code		
Route Project for Approval		x		0000002		29	Problem Location	and the second	
- Route Project for Approval		x		0000002		30	Date Work Requested	2006-11-29	
		XXXXX	с	0000007	с	41	Date to Perform		
		ABSIS CONSULTING	CONSULTING	0000009	2000600001	42	Division Code Department Code		
		X		0000002		61	Account Code	ACCOUNT 2	
		X		0000002		62	Department Code	ACCOUNT_2	
	i i	x		0000001		63	Equipment Code		
		×		0000001		64	Work Description		
		х		0000002		65			
		×		0000003		66			
		х		0000002		67			
		х		0000002		68			
		х		0000002		69			
		XXXXX	x	0000006	x	70			
		XXXXX	x	0000006	х	71			
		X000X	х	0000006	х	72			
		XXXXX	×	0000006	x	73			
		XXXXX	X	0000006	x	74			
		x		0000001		75			
		STADIUM		0000010		76			
		STADIUM		0000010		77			
		STADIUM PAINTING STADIUM		0000010		78			
		PAINTING		0000010		79			
		TEST	XXXX	0000004	XXXX	80			
		x		0000001		81			
		х		0000001		82			





# **Route Projects for Approval**

To approve activated projects select, "Approve Project Request" on the Tasks portion of the Process Navigator.

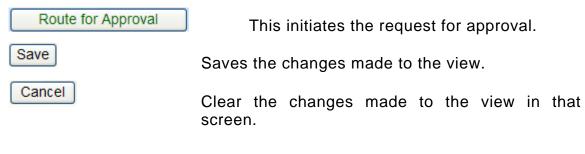


- Monitor Work Requests Status by Action
- Route Project for Approval

### Below is the Approve Project Request View.

Breese Neulaster	Route Projec	t for Approx							
Process Navigator	C Location:	a for Approva		- Orna	nization:		- Project:		
Domain:	State:						Project Type:		
Project Management	City:		— <u> </u>		tment:	— <u> </u>	Project:		
Activity:	Site:				am Type:		Manager:		
Project Management	Building:						Statuses:	¥	
Process or Role:									
Project Coordinator									
Tasks:									
Assign Kick-Off Meeting Date and Minutes	Requested Pro	jects 2 Requer	у		Project Information	Save	Cancel	Route for Approval	
Create or Edit Actions	Burlant				Approval Level 1*:	FAKE, V	ILLIAM M. (MAC;		
Monitor Work Requests Status by Action Route Project for Approval	Project Request	Project	Project	Date	Approval Level 2:	EM_IPA	DMIN		
a Route Project for Approval	Code + 0000007	Discipline	ipline Priority	y Created 29/11/200	Approval Level 3:	JONES,	JR., PHILIP M.		
	00000001		2	28/11/200			_		
					Project Code:	00000	17	Date Created:	2006-11-29
					Project Description:	×			
					Project Summary:	s			
					Project Priority:	1		Date Requested:	2006-11-29
					Requestor:	EM_IPA	OMIN	Requestor Phone:	88888888
					Department Contact:	ARNOLD	, FORREST LEE	Contact's Phone:	
					Site Code:			Building Code:	
					Division Code:			Account Code*:	ACCOUNT_:
					Department Code:			Department Name:	
					Program Name:				
					Area Affected:	0.00		Employees Affected:	
					Project Benefit*:	x			×
					Date - Requested Start:		er 29, 2006	Date - Requested End:	
					Days Per Week:	5		Customer Budget:	0.00

The Project Coordinator will initiate the approval process to the three levels.







## AVC Tasks

The selections of Project Coordinator Tasks are limited to the following:

Tasks:

Approve Project Request

Now we will discuss each of the Tasks one by one.





## **Approve Project Request**

To approve activated projects select, "Approve Project Request" on the Tasks portion of the Process Navigator.

Tasks:	
🗖 Approve Project Request ◄	

Below is the Approve Project Request View.

A 🔍 🖻 🔲 ARCHIBUS/FM			(Ø 1	Show/Hide Navigator   🕭 My	Activities   🙆 My Home   🕑 M	ty Profile   🕐 Logout	
rocess Navigator	Approve Project Request					Show	
	C Location:		lization:	Project:			
Pomain:	State:	Divisio		Project Type:	<u> </u>		
activity:	City:		tment:	Project:			
roject Management	Building:		am Type:	Manager:			
rocess or Role:		Progra	am:	Statuses:			
ffice Manager							
asks:							
Review Created Projects							
Edit and Request/Withdraw Project Request							
Review Requested and Withdrawn Projects							
Change Project Priority	Projects Routed for Approval 2 Requery		Project Information	Approve Reject			
Review Activated Projects Approve Project Request	Project		Use the buttons above to A Approval Level 1*:	Use the buttons above to Approve or Reject this project.			
Approve Project Request	Request Project Project D	Date	FAKE, WILLIAM M. (MAC)	Status: Not Reviewed	Date Approved:		
		Created 1/28/2006	Approval Level 2:	Status:	Date Approved:		
		-, ,	EM_IPADMIN	Not Reviewed			
			Approval Level 3:	Status:	Date Approved:		
			JONES, JR., PHILIP M.	Not Reviewed			
			Comments:			<u></u>	
						×	
			Project Code:	0000002	Date Created:	2006-11-28	
			Project Description:	x	Date created.	2000-11-20	
			Project Summary:	Ŷ			
			Project Priority:	2	Date Requested:	2006-11-28	
			Requestor:	EM_IPADMIN	Requestor Phone:	88888888	
			Department Contact:	BAKER, ARZELLA Y.	Contact's Phone:		
			:	protectly received in	Building Code:		
			Division Code:		Account Code*:	ACCOUNT_1	
			Department Code:		Department Name:		
			Program Name:				
						0	
			Area Affected:	0.00	Employees Affected:		
			Area Affected: Project Benefit*:	0.00 x	Employees Affected: Project Scope*:	x	
			Area Affected: Project Benefit*: Date - Requested Start:	0.00 x November 28, 2006	Employees Affected: Project Scope*: Date - Requested End:	×	

There are 3 levels of approval. The AVC has final of approval after the Customer.

Approve Select this button to approve the project.

Reject Select this button to reject the project.





### **Manipulating Views** Alter Alter will let you define a search Save As Once you have defined your search you can save the search parameters by using the "Save As" button. This Button only appears after you have a search criteria defined New New will let you define a new Search Criteria Help Help will send you to the Help Pages 🖾 E-mail E-mail will let you send the result via E-mail Print

Will print your result to the printer of your choice

Alter View - Console       Alter View - Dialog: View         Image: All Resources by Work Request Hi       Image: All Resources by Work Request History         Image: All Resources by Work Request History       Hotlist:         Image: All Resources by Work Request History       Hotlist:         Image: All Resources by Work Request History       Image: All Resources by Work Request History         Image: All Resources by Work Request History       Image: All Resources by Work Request History         Image: All Resources by Work Request History       Image: All Resources by Work Request History         Image: All Resources above to select the view or one of its table-group. Then use the option buttons that appear to the groups. Then use the option of the view or of the Table-group tutton to close this dialog and the History work Request History         Image: The muse the option button to close this dialog and the prover view.       Ork Cancel         Image: The muse the option button to close this dialog and the prover view.       Image: The form will refresh to show your changes in the console.         Image: The muse the option button to close this dialog and the prover view.       Image: The muse the option button to close this dialog and the prover view.         Image: Work Request the form will refresh to close the dialog.       Image: The prover view.         Image: The muse the option button to close the dialog.       Image: The prover view.         Image: The muse the option button to close this dialog and the prover view. <t< th=""><th>Alter View</th><th></th><th>🖉 Apply   🞗 Cancel   🖓 Help</th></t<>	Alter View		🖉 Apply   🞗 Cancel   🖓 Help
<ul> <li>All Resources by Work Requires a service of the servi</li></ul>	Alter View - Console	Alter View - Dialog: View	
<ul> <li>Set Options</li> <li>Set View's Title:         <ul> <li>All Resources by Work Request History</li> <li>Show PDF Button</li> </ul> </li> <li>Press OK to file your changes. The form will refresh to show your changes in the console.</li> <li>OK Cancel</li> <li>OK Cancel</li> </ul>	All Resources by Work Reque	Hotlist: Access:	
<ul> <li>Set Options</li> <li>Set View's Title:         <ul> <li>All Resources by Work Request History</li> <li>Show PDF Button</li> </ul> </li> <li>Press OK to file your changes. The form will refresh to show your changes in the console.</li> <li>OK Cancel</li> <li>OK Cancel</li> </ul>		Options Add Table-Group Frameset	
<ul> <li>Use the console above to select the view or one of its table-groups. Then use the option buttons that appear to the right to change characteristics of the view or table-group.</li> <li>If there are no table-groups, use the Apaly button to close this dialog and refresh your view.</li> <li>If you want to exit without saving your changes, press the Cancel</li> </ul>		Set View's Title:	
<ul> <li>Use the console above to select the view or one of its table-groups. Then use the option buttons that appear to the right to change characteristics of the view or table-group.</li> <li>If there are no table-group.</li> <li>If there are no table-group button to add one.</li> <li>When finished, press the Apply button to cose this dialog and refresh your view.</li> <li>If you want to exit without saving your changes, press the Cancel</li> </ul>		,	
the view or one of its table- groups. Then use the option buttons that appear to the right to change characteristics of the view or table-group. If there are no table-groups, use the Add Table-Group button to add one. When finished, press the Apply button to close this dialog and refresh your view. If you want to exit without saving your changes, press the Cancel			
	<ul> <li>the view or one of its table- groups. Then use the option buttons that appear to the right to change characteristics of the view or table-group.</li> <li>If there are no table-groups, use the Add Table-Group button to add one.</li> <li>When finished, press the Apply button to close this dialog and refresh your view.</li> <li>If you want to exit without saving your changes, press the Cancel button to close this dialog.</li> </ul>		

**Options** Will take to you the Options View (See Next Page)



Add Table-Group Will let you add tables to you search

Frameset Will set the way the browser will display the frames in the view

Alter View	🖉 Apply   🔇 Cancel   🕜 Help
Alter View - Console	Alter View - Dialog: Table Group
All Resources by Work Request Hi All Resources by Work Reque	Type: Report Frame:
	Visible Fields Filter Sort Statistics Options Standard Add Table-Group Remove Table-Group
	Set Options
<ul> <li>Use the console above to select the view or one of its table- groups. Then use the option buttons that appear to the right to change characteristics of the view or table-group.</li> <li>If there are no table-groups, use the Add Table-Group button to add one.</li> <li>When finished, press the Apply button to close this dialog and refresh your view.</li> <li>If you want to exit without saving your changes, press the Cancel button to close this dialog.</li> </ul>	Title: All Resources by Work Request History Type: Report Format: Number of Columns: Column Column 2 Show Grid? Printable? Show Default Actions? Press OK to file your changes. The form will refresh to show your changes in the console. OK Cancel

Visible Fields Lets you change the Visible Fields on the View

- Filter Will let you the filter data so you can see only the Requests that you wish
- Sort Will let you sort the data the way you wish
- Statistics Will let you set the statistics like total, average, mean ... to your view
- Options Will let you establish a title and it you would like a show PDF Button on the view

Standard Will so and let you edit the standard that applies in the view

Add Table-Group Will let you add a table to your search

Remove Table-Group Will let you remove a table from your search





Save As Once you have defined your search you can save the search parameters by using the "Save As" button. This Button only appears after you have a search criteria defined