



AOS Developments
IP
Document for ARCHIBUS/FM Web
Central



Training Outline ARCHIBUS/FM Web Central For Informal Projects

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Prepared By: AOS-USA, Inc.





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 Explorer
- 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 ARCHIBUS/FM Welcome Page language: English (United States) ▼

Your company's collaborative, 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.](#)

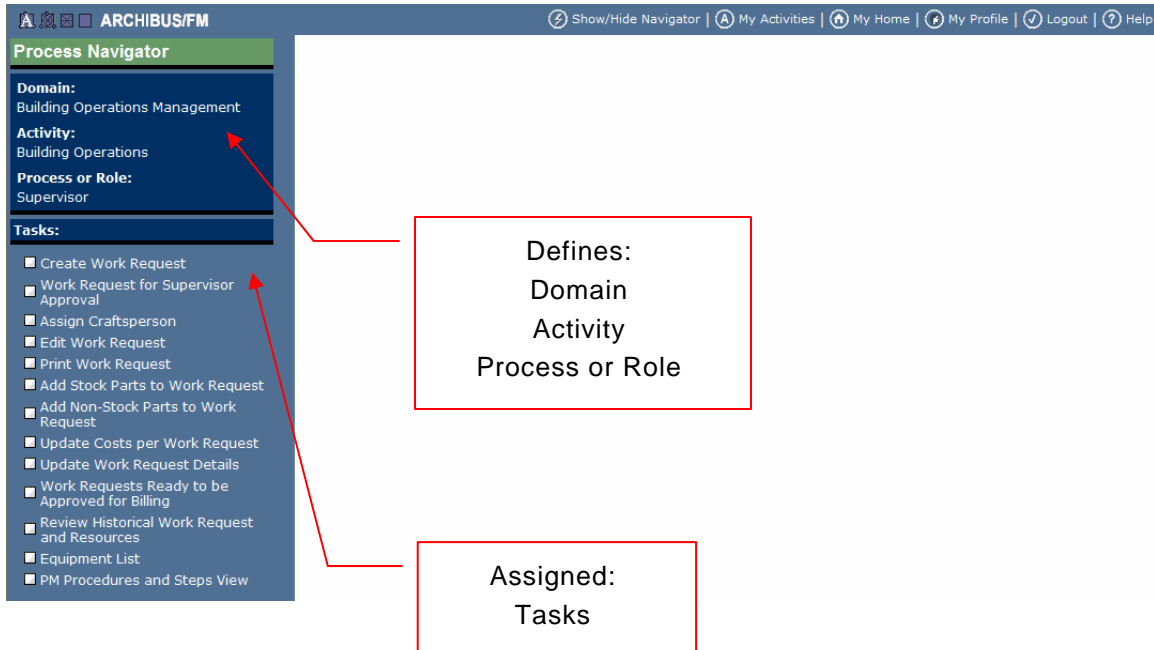
Remember my user name on this computer

 **Be Our Guest**
If you don't have an account, use this selection to access your site's guest activities.

- Select the “Sign In” Button

Basic Navigation of ARCHIBUS/FM Web Central


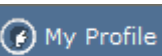
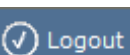
Once you have logged in you will see the follow screen in you browser.



The screenshot shows the ARCHIBUS/FM interface. The Process Navigator sidebar on the left is annotated with two red boxes:

- Defines:** Domain
Activity
Process or Role (points to the Domain, Activity, and Process or Role sections)
- Assigned:** Tasks (points to the Tasks list)

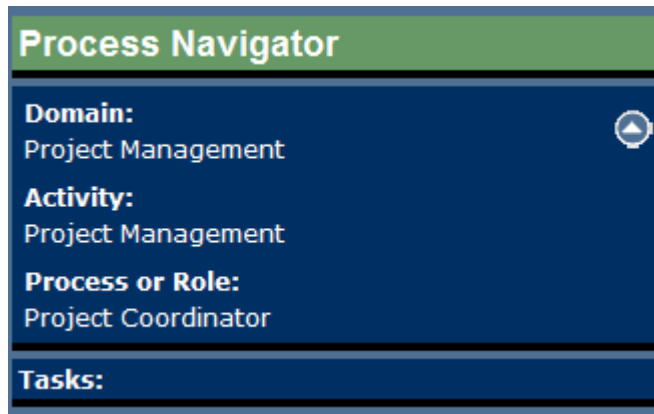
Your button choices along the top of the page

-  **ARCHIBUS/FM** Link to the Archibus Web Site
-  Shows or Hides the Process Navigator
-  Displays a list of your assigned activities
-  Returns to the user defined home page
-  Displays your User Profile of ARCHIBUS/FM Web Central
-  Will Log you out of ARCHIBUS/FM Web Central
-  Takes you the HTML Help Pages for ARCHIBUS/FM

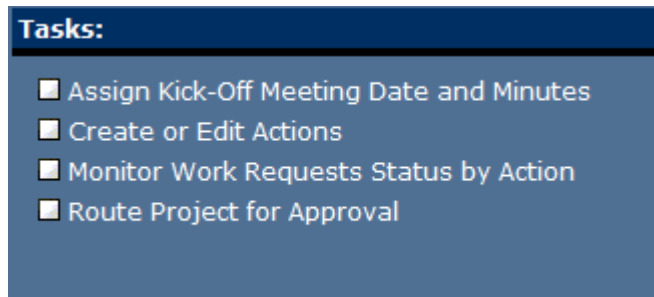
The Process Navigator

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).



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



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.

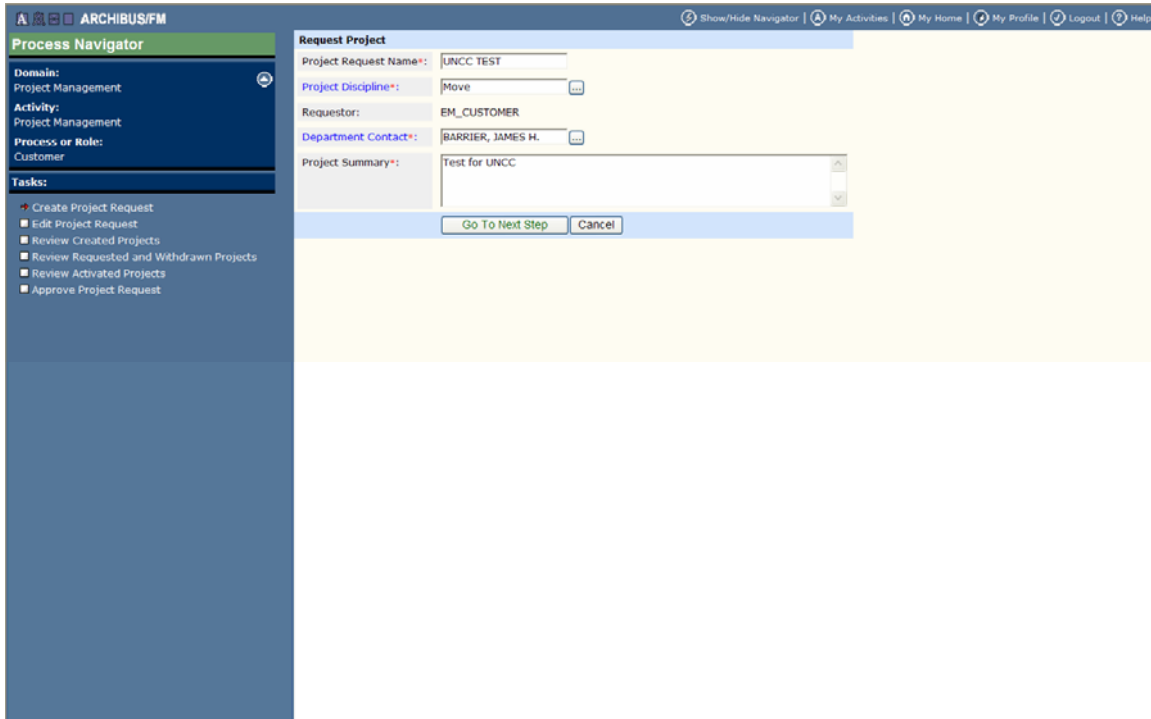
Create Project Request – Screen 1

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

Tasks:

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

Below is the Create Project Request View.



ARCHIBUS/FM

Show/Hide Navigator | My Activities | My Home | My Profile | Logout | Help

Process Navigator

Domain: Project Management

Activity: Project Management

Process or Role: Customer

Tasks:

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

Request Project

Project Request Name*: UNCC TEST

Project Discipline*: Move




Requestor: EM_CUSTOMER

Department Contact*: BARRIER, JAMES H.

Project Summary*: Test for UNCC


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>	<u>Description of Fields</u>
Project Request Name:	Name of the Project the request by the customer.
Project Discipline: 	Type of Project that is being requested.
<u>Requestor:</u>	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

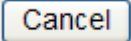
**Red fields are required*

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.



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




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

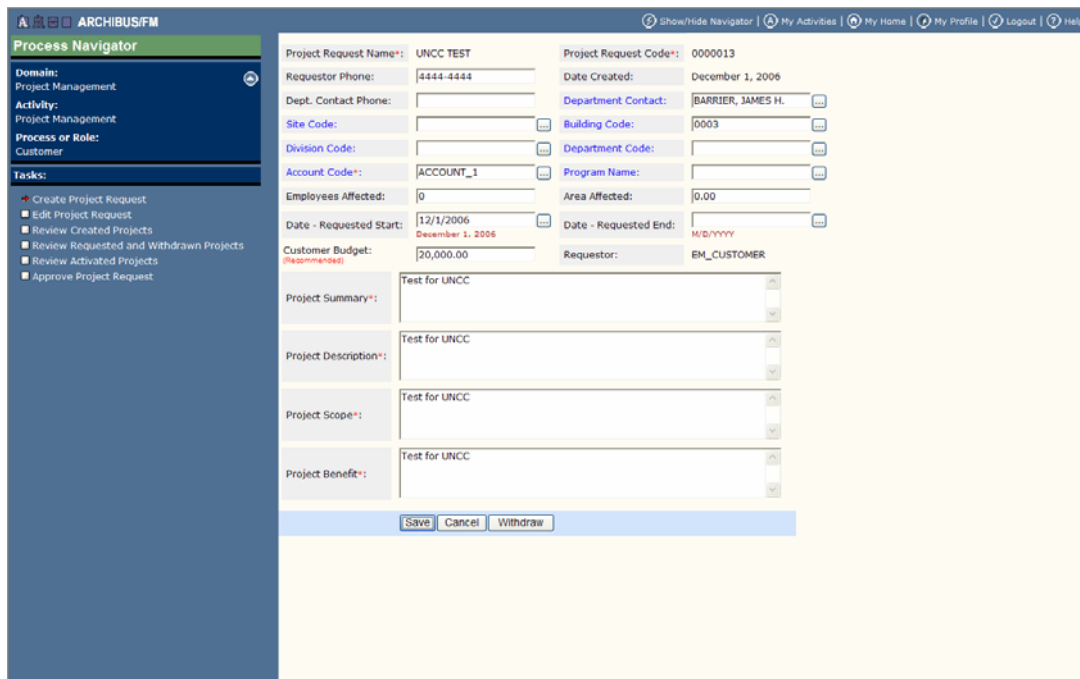
Create Project Request – Screen 2

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

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.



ARCHIBUS/FM | Show/Hide Navigator | My Activities | My Home | My Profile | Logout | Help

Process Navigator

Domain: Project Management

Activity: Project Management

Process or Role: Customer

Tasks:

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

Project Request Name*: UNCC TEST **Project Request Code*:** 0000013

Requestor Phone: 4444-4444 **Date Created:** December 1, 2006

Dept. Contact Phone: **Department Contact:** BARRIER, JAMES H.

Site Code: **Building Code:** 0003

Division Code: **Department Code:**

Account Code*: ACCOUNT_1 **Program Name:**

Employees Affected: 0 **Area Affected:** 0.00

Date - Requested Start: 12/1/2006 **Date - Requested End:** M/D/YYYY

Customer Budget: 20,000.00 **Requestor:** EM_CUSTOMER

Project Summary*: Test for UNCC




Project Description*: Test for UNCC


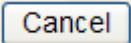
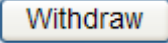
Project Scope*: Test for UNCC

Project Benefit*: Test for UNCC

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
- 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.

-  Saves the changes made to the Project Request and changes the status to “Created”.
-  Clear the changes made to the Project Request in that screen.
-  If the Customer does not choose to create the Project, he/she may withdraw the request.

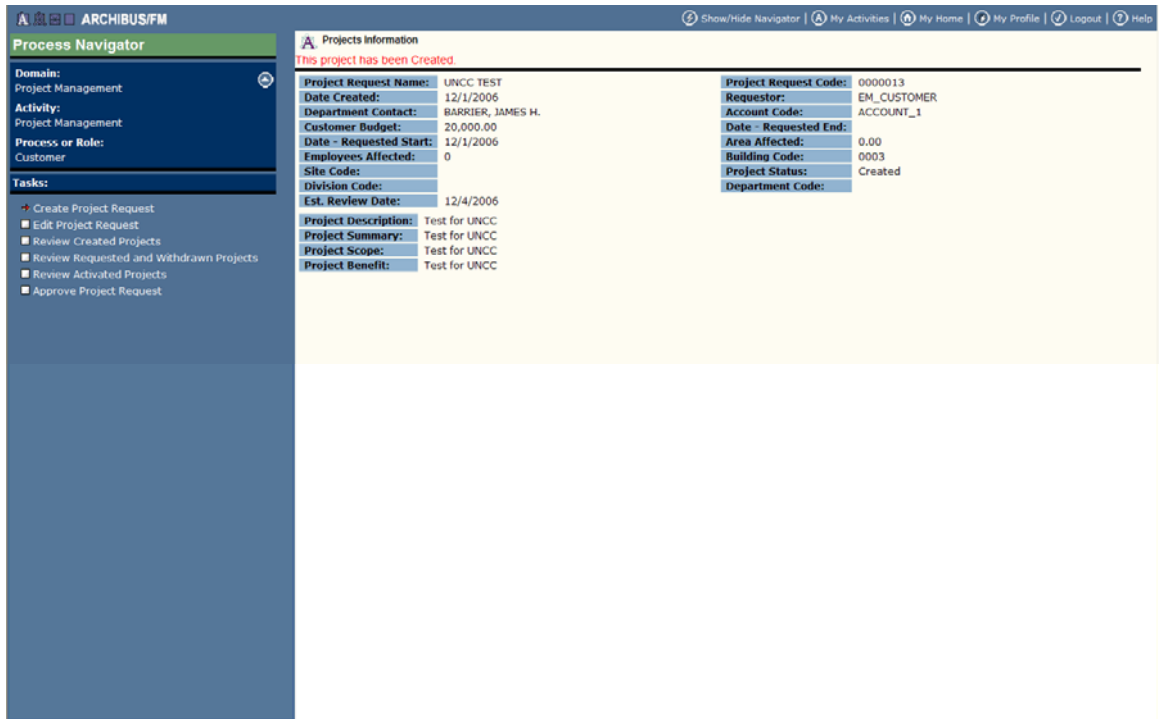
Create Project Request Screen 3

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.



ARCHIBUS/FM | Show/Hide Navigator | My Activities | My Home | My Profile | Logout | Help

Process Navigator

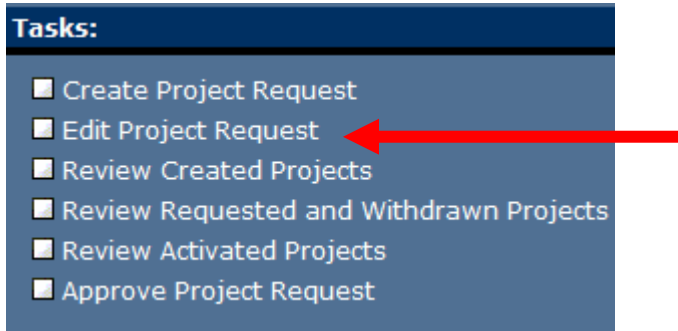
- Domain: Project Management
- Activity: Project Management
- Process or Role: Customer
- Tasks:**
 - Create Project Request
 - Edit Project Request
 - Review Created Projects
 - Review Requested and Withdrawn Projects
 - Review Activated Projects
 - Approve Project Request

Projects Information
This project has been Created.

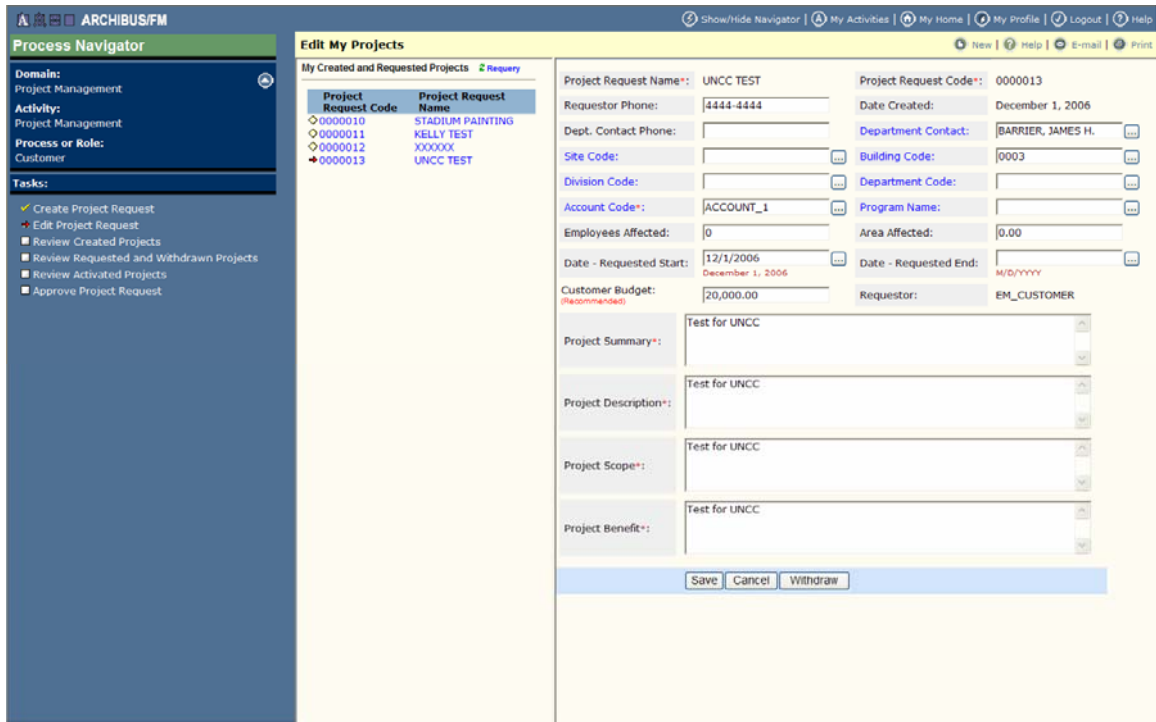
Project Request Name: UNCC TEST	Project Request Code: 0000013
Date Created: 12/1/2006	Requestor: EM_CUSTOMER
Department Contact: BARRIER, JAMES H.	Account Code: ACCOUNT_1
Customer Budget: 20,000.00	Date - Requested End:
Date - Requested Start: 12/1/2006	Area Affected: 0.00
Employees Affected: 0	Building Code: 0003
Site Code:	Project Status: Created
Division Code:	Department Code:
Est. Review Date: 12/4/2006	
Project Description: Test for UNCC	
Project Summary: Test for UNCC	
Project Scope: Test for UNCC	
Project Benefit: Test for UNCC	

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.



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





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)

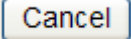
Project Summary: Describe the project requested

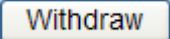
Project Description: Detailed description of the project.

Project Scope: The overall scope of the project.

Project Benefit: The description of benefit to the project.

 Saves the changes made to the Project Request and changes the status to “Created”.


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

 If the Customer does not choose to create the Project, he/she may withdraw the request.

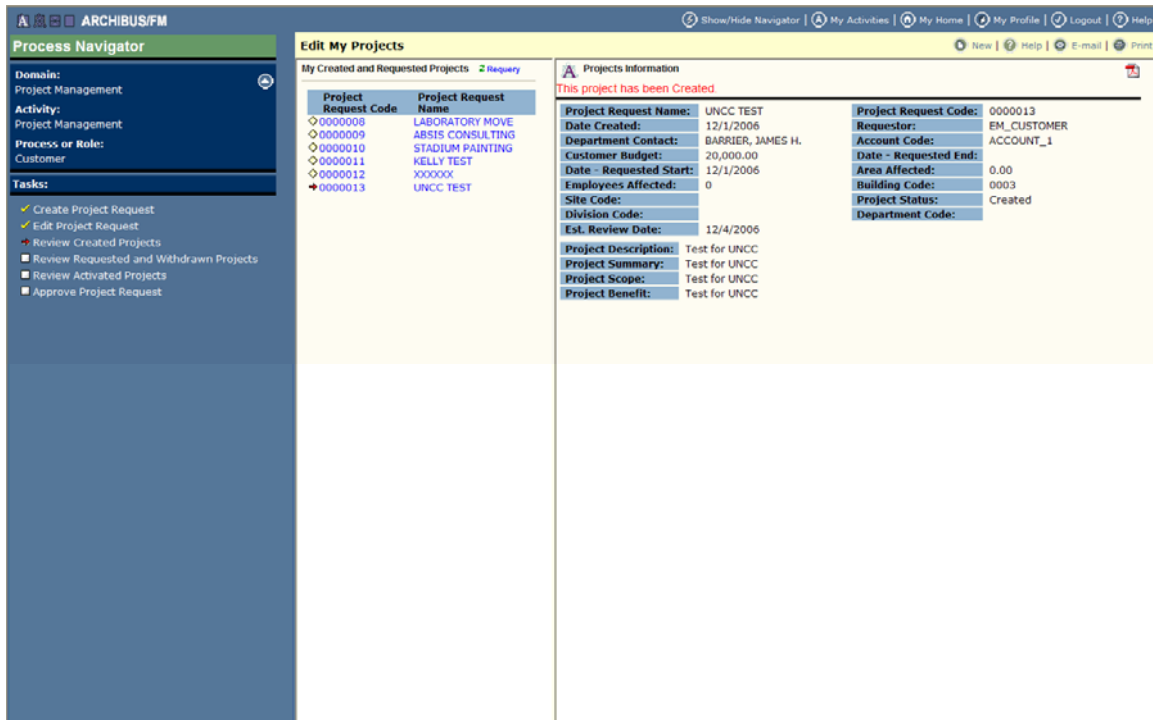
Review Created Projects

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.

Tasks:


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

Select the Project Request you wish to view and Print.



Project Request Code	Project Request Name
0000009	LABORATORY MOVE
0000009	ABSYS CONSULTING
0000010	STADIUM PAINTING
0000011	KELLY TEST
0000012	XXXXXX
0000013	UNCC TEST


Project Request Name:	UNCC TEST	Project Request Code:	0000013
Date Created:	12/1/2006	Requestor:	EM_CUSTOMER
Department Contact:	BARRIER, JAMES H.	Account Code:	ACCOUNT_1
Customer Budget:	20,000.00	Date - Requested End:	
Date - Requested Start:	12/1/2006	Area Affected:	0.00
Employees Affected:	0	Building Code:	0003
Site Code:		Project Status:	Created
Division Code:		Department Code:	
Est. Review Date:	12/4/2006		
Project Description:	Test for UNCC		
Project Summary:	Test for UNCC		
Project Scope:	Test for UNCC		
Project Benefit:	Test 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  .

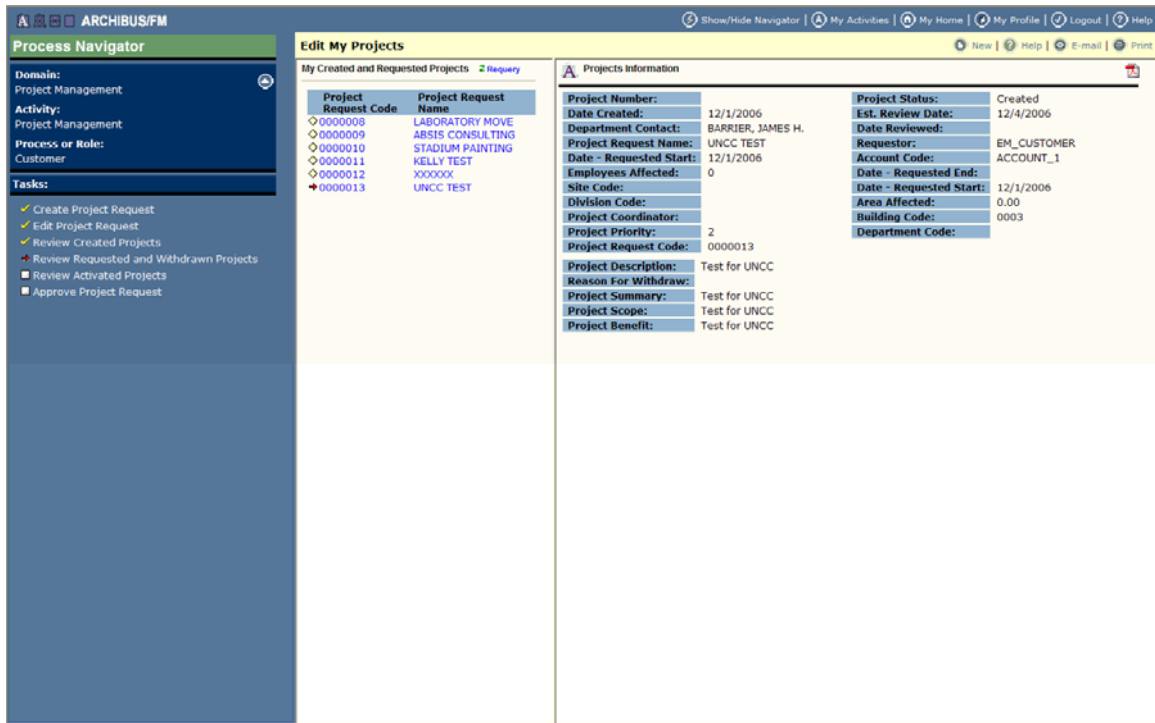
Review Requested and Withdrawn Projects

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.



Process Navigator

Domain: Project Management

Activity: Project Management

Process or Role: Customer

Tasks:


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

Edit My Projects

Project Request Code	Project Request Name
0000008	LABORATORY MOVE
0000009	ABISIS CONSULTING
0000010	STADIUM PAINTING
0000011	KELLY TEST
0000012	XXXXXX
0000013	UNCC TEST

Projects Information


Project Number:	12/1/2006	Project Status:	Created
Date Created:	12/1/2006	Est. Review Date:	12/4/2006
Department Contact:	BARRIER, JAMES H.	Date Reviewed:	
Project Request Name:	UNCC TEST	Requestor:	EM_CUSTOMER
Date - Requested Start:	12/1/2006	Account Code:	ACCOUNT_1
Employees Affected:	0	Date - Requested End:	
Site Code:		Date - Requested Start:	12/1/2006
Division Code:		Area Affected:	0.00
Project Coordinator:		Building Code:	0003
Project Priority:	2	Department Code:	
Project Request Code:	0000013		
Project Description:	Test for UNCC		
Reason for Withdraw:			
Project Summary:	Test for UNCC		
Project Scope:	Test for UNCC		
Project Benefit:	Test 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 

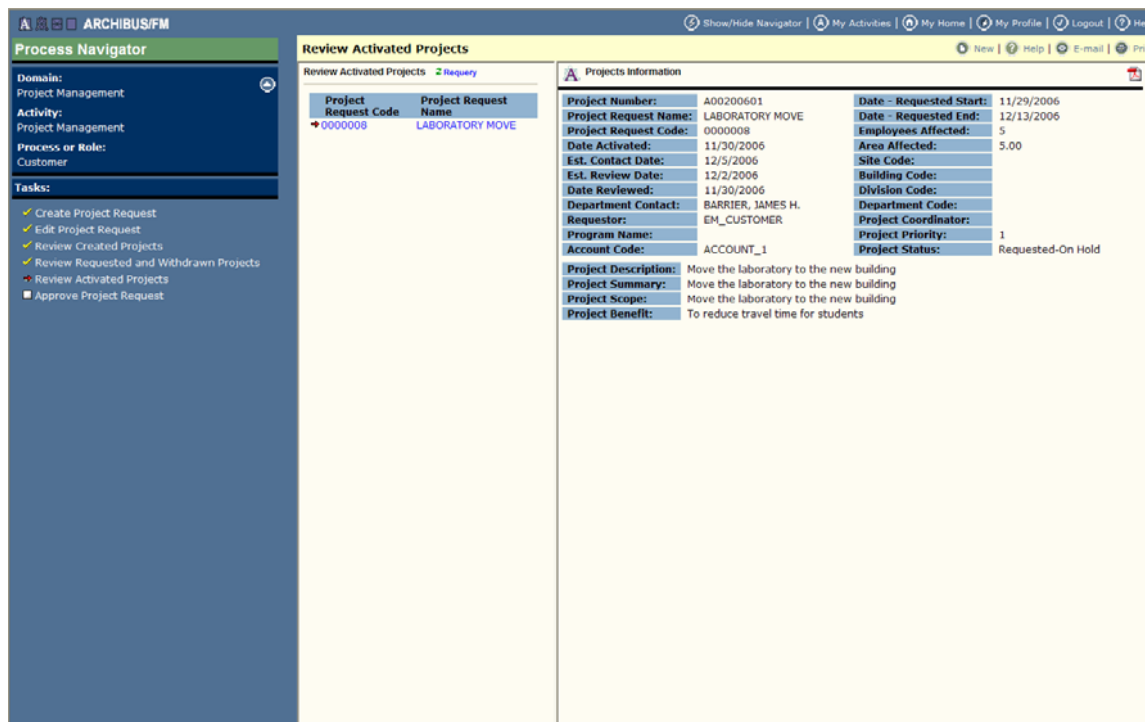
Review Activated Projects

To review activated projects select, “Review Activated 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 Add Non-stock Part to Work Request View.



The screenshot shows the ARCHIBUS/FM interface for reviewing activated projects. On the left is the Process Navigator with a task list where 'Review Activated Projects' is selected. The main area is titled 'Review Activated Projects' and displays a table with one project entry:

Project Request Code	Project Request Name
0000008	LABORATORY MOVE

On the right, the 'Projects Information' section provides details for the selected project:

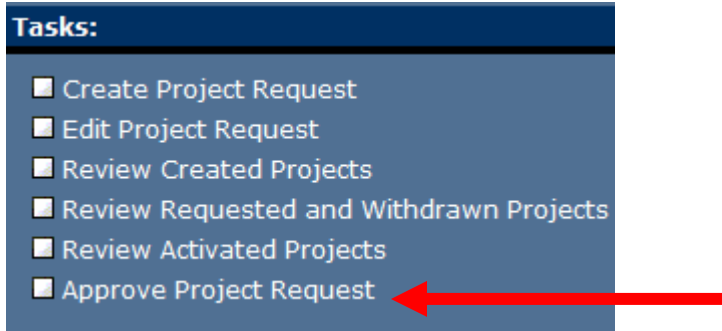
- Project Number:** A00200601
- Project Request Name:** LABORATORY MOVE
- Project Request Code:** 0000008
- Date Activated:** 11/30/2006
- Est. Contact Date:** 12/5/2006
- Est. Review Date:** 12/2/2006
- Date Reviewed:** 11/30/2006
- Requestor:** EM_CUSTOMER
- Program Name:** ACCOUNT_1
- Account Code:** ACCOUNT_1
- Date - Requested Start:** 11/29/2006
- Date - Requested End:** 12/13/2006
- Employees Affected:** 5
- Area Affected:** 5.00
- Building Code:**
- Division Code:**
- Department Code:**
- Project Coordinator:**
- Project Priority:** 1
- Project Status:** Requested-On Hold

Additional project details include:

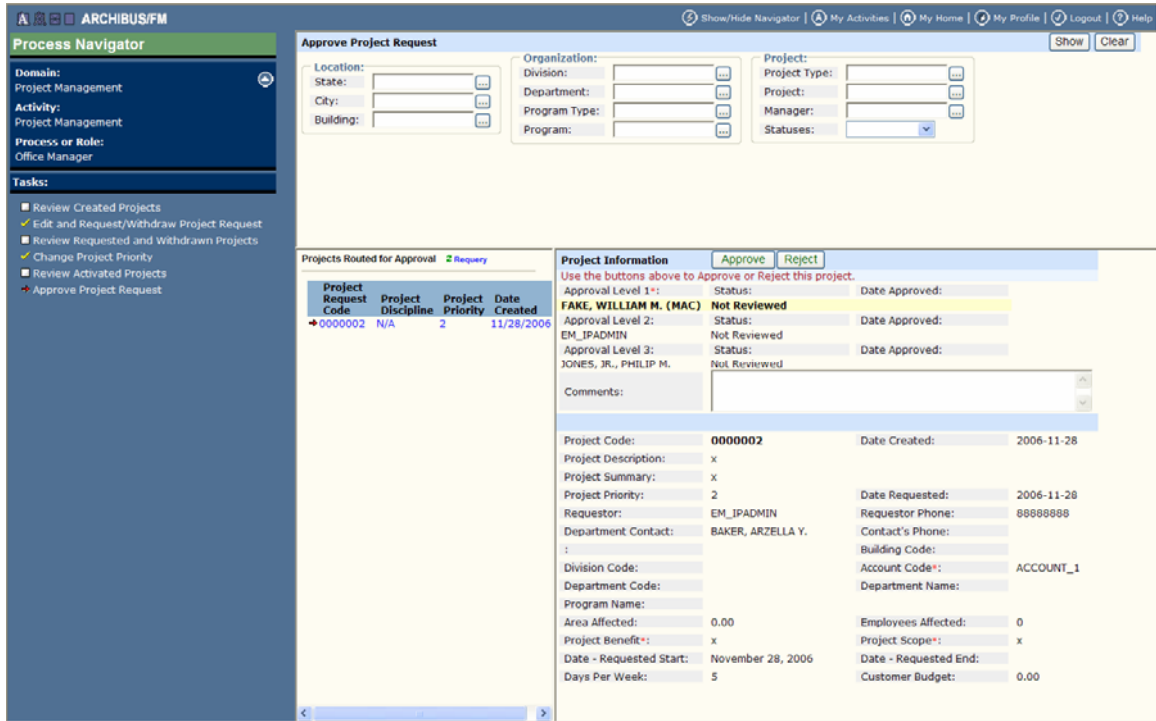
- Project Description:** Move the laboratory to the new building
- Project Summary:** Move the laboratory to the new building
- Project Scope:** Move the laboratory to the new building
- Project Benefit:** To reduce travel time for students

Approve Project Request

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



Below is the Approve Project Request View.



Projects Routed for Approval

Project Request Code	Project Discipline	Project Priority	Date Created
0000002	N/A	2	11/28/2006

Project Information

Use the buttons above to Approve or Reject this project.


Approval Level	Status	Date Approved
FAKE, WILLIAM M. (MAC)	Not Reviewed	
EM_IPADMIN	Not Reviewed	
JONES, JR., PHILIP M.	Not Reviewed	

Project Details:

- Project Code: 0000002
- Date Created: 2006-11-28
- Project Description: x
- 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:
- Account Code: ACCOUNT_1
- Department Name:
- Area Affected: 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.

 Select this button to approve the project.

 Select this button to reject the project.

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.

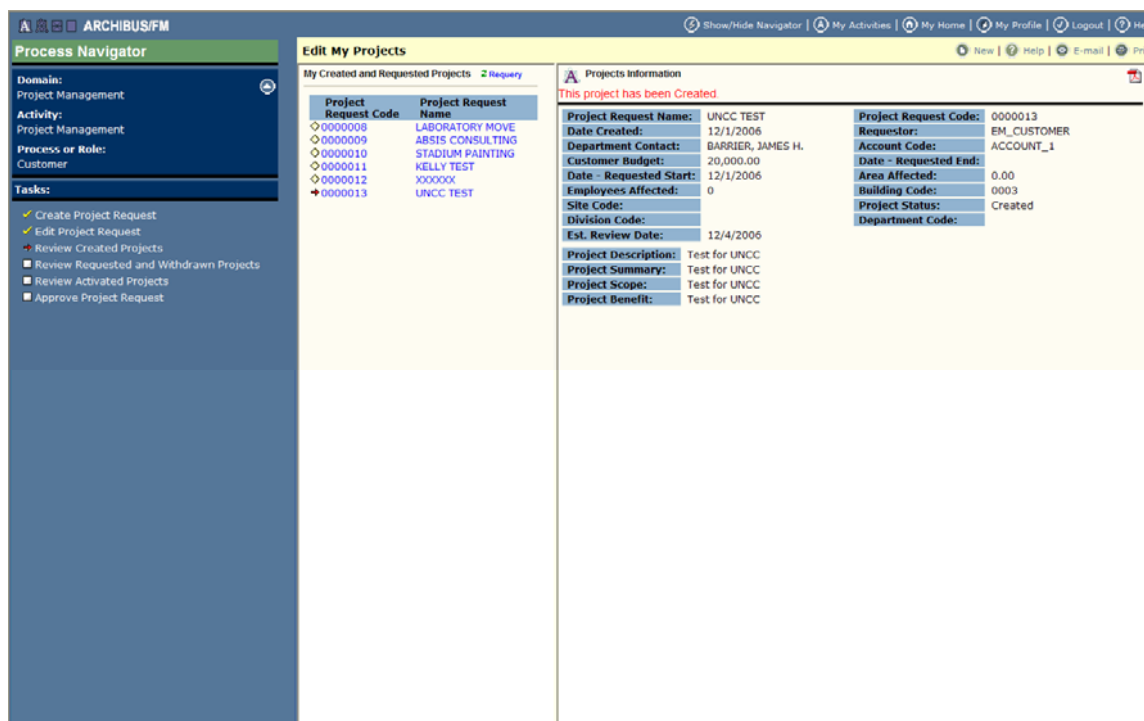
Review Created Projects

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.



Process Navigator

Domain: Project Management

Activity: Project Management

Process or Role: Customer

Tasks:

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


My Created and Requested Projects

Project Request Code	Project Request Name
0000009	LABORATORY MOVE
0000009	ABISIS CONSULTING
0000010	STADIUM PAINTING
0000011	KELLY TEST
0000012	XXXXXX
0000013	UNCC TEST

Projects Information

This project has been Created

Project Request Name:	UNCC TEST	Project Request Code:	0000013
Date Created:	12/1/2006	Requestor:	EM_CUSTOMER
Department Contact:	BARRIER, JAMES H.	Account Code:	ACCOUNT_1
Customer Budget:	20,000.00	Date - Requested End:	
Date - Requested Start:	12/1/2006	Area Affected:	0.00
Employees Affected:	0	Building Code:	0003
Site Code:		Project Status:	Created
Division Code:		Department Code:	
Est. Review Date:	12/4/2006		
Project Description:	Test for UNCC		
Project Summary:	Test for UNCC		
Project Scope:	Test for UNCC		
Project Benefit:	Test 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  .

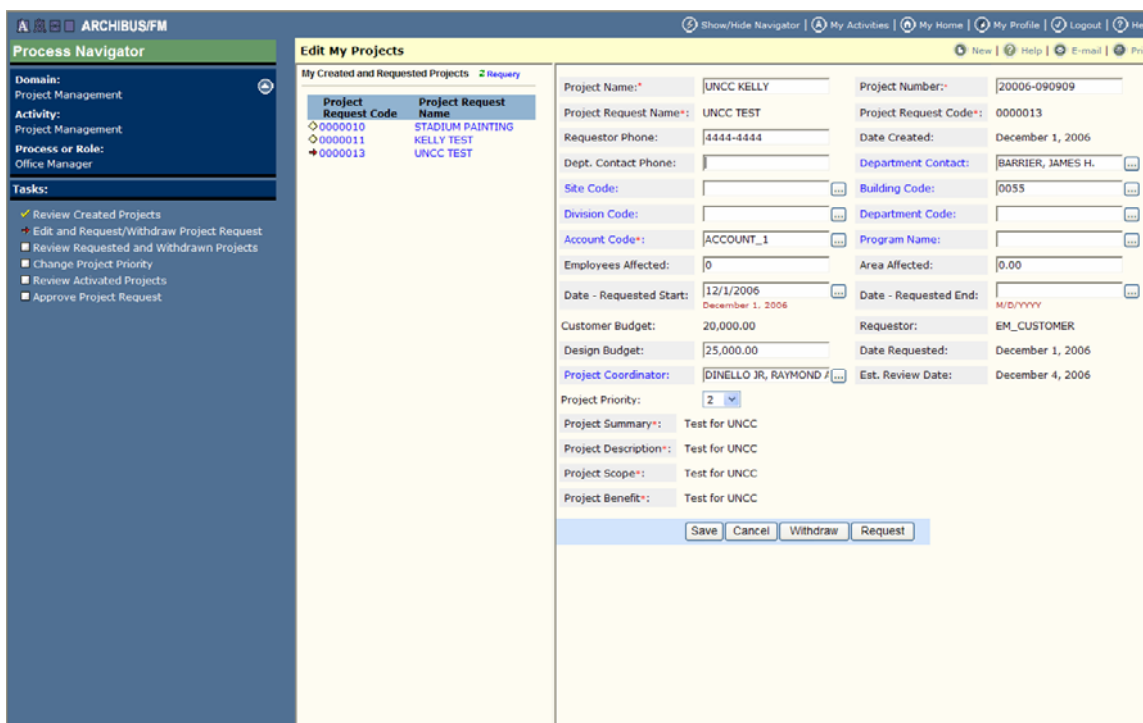
Edit and Request/Withdraw Project Request

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 Services.

Project Number: Assigns the project number given by Design Services

Department Contact Phone:  Department contact for the project

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

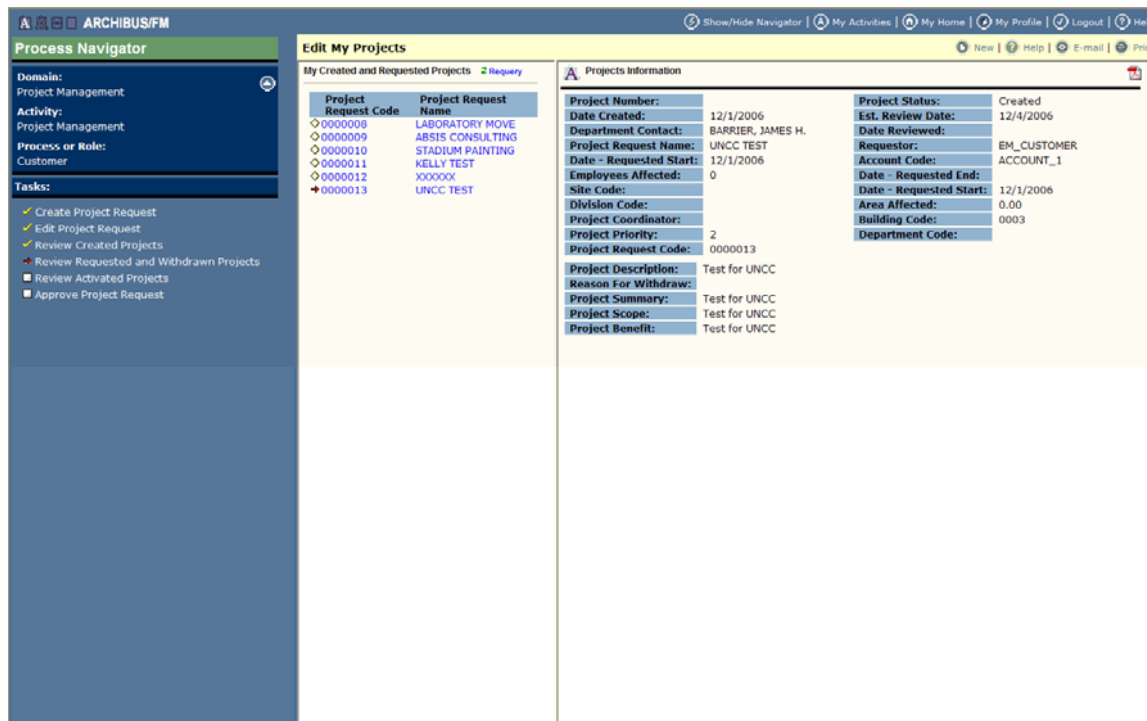
To review Project Request select, "Review Requested and Withdrawn Projects" on the Tasks portion of the Process Navigator.

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 Review Requested and Withdrawn Projects View.




The screenshot displays the ARCHIBUS/FM web application interface. On the left is the Process Navigator with a 'Tasks' section where 'Review Requested and Withdrawn Projects' is selected. The main area is divided into two panes: 'My Created and Requested Projects' and 'Projects Information'.

Project Request Code	Project Request Name
0000008	LABORATORY MOVE
0000009	ABIS CONSULTING
0000010	STADIUM PAINTING
0000011	KELLY TEST
0000012	XXXXXX
0000013	UNCC TEST

The 'Projects Information' pane shows details for the selected project (UNCC TEST):

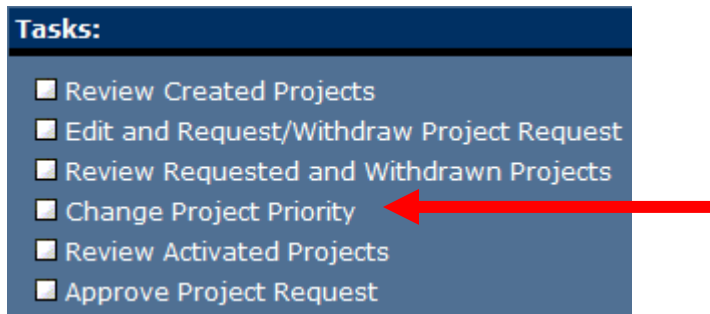
- Project Number: 0000013
- Date Created: 12/1/2006
- Department Contact: BARRIER, JAMES H.
- Project Request Name: UNCC TEST
- Date - Requested Start: 12/1/2006
- Employees Affected: 0
- Site Code: 0
- Division Code: 0
- Project Coordinator: 2
- Project Priority: 0000013
- Project Request Code: 0000013
- Project Description: Test for UNCC
- Reason For Withdraw: Test for UNCC
- Project Summary: Test for UNCC
- Project Scope: Test for UNCC
- Project Benefit: Test for UNCC

Additional fields on the right include Project Status (Created), Est. Review Date (12/4/2006), Date Reviewed (12/4/2006), Requestor (EM_CUSTOMER), Account Code (ACCOUNT_1), Date - Requested End (12/1/2006), Date - Requested Start (12/1/2006), Area Affected (0.00), Building Code (0003), and Department Code.

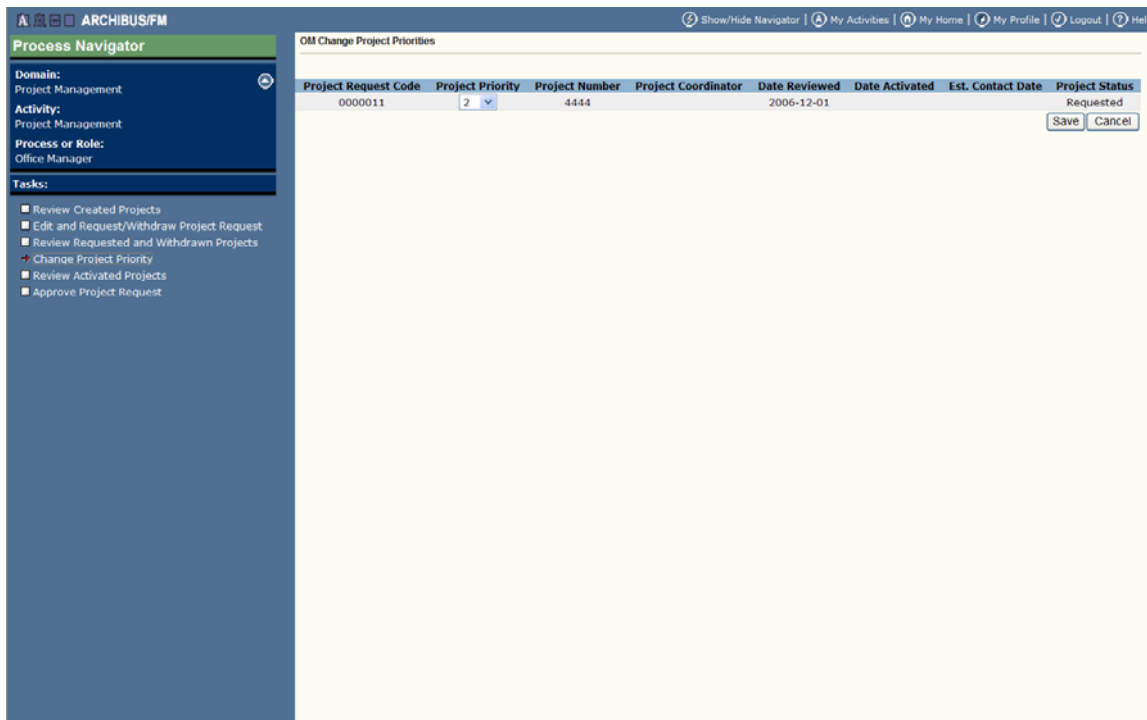
You can select Print on your browser. If you wish to create a PDF of the Project Request simply select the PDF Icon. 

Change Project Priority

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



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.



Save

Saves the changes made to the Project Priority and the status does not change.


Cancel

Clear the changes made to the Project Priority in that screen.

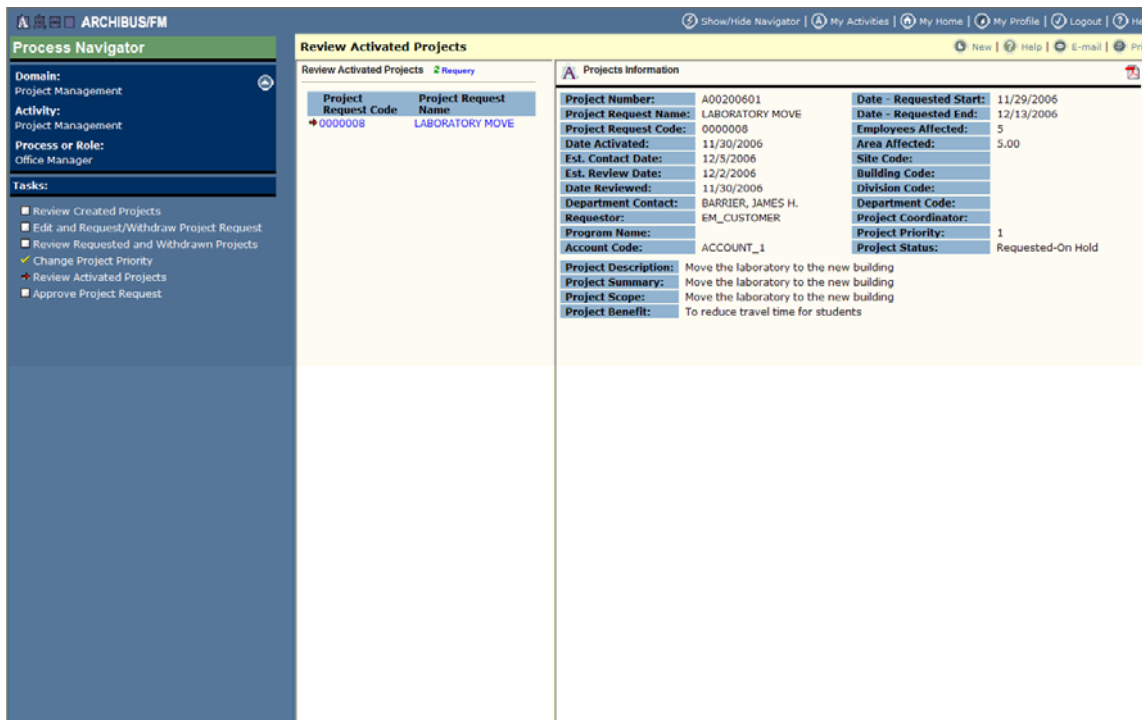
Review Activated Projects

To view activated projects, select “Review Activated Projects” 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 Review Activated Projects view.




Review Activated Projects

Project Request Code	Project Request Name
0000008	LABORATORY MOVE

Projects Information


Project Number:	A00200601	Date - Requested Start:	11/29/2006
Project Request Name:	LABORATORY MOVE	Date - Requested End:	12/13/2006
Project Request Code:	0000008	Employees Affected:	5
Date Activated:	11/30/2006	Area Affected:	5.00
Est. Contact Date:	12/3/2006	Site Code:	
Est. Review Dates:	12/2/2006	Building Code:	
Date Reviewed:	11/30/2006	Division Code:	
Department Contact:	BARRIER, JAMES H.	Department Code:	
Requestor:	EM_CUSTOMER	Project Coordinator:	
Program Name:		Project Priority:	1
Account Code:	ACCOUNT_1	Project Status:	Requested-On Hold
Project Description:	Move the laboratory to the new building		
Project Summary:	Move the laboratory to the new building		
Project Scope:	Move the laboratory to the new building		
Project Benefit:	To reduce travel time for students		

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

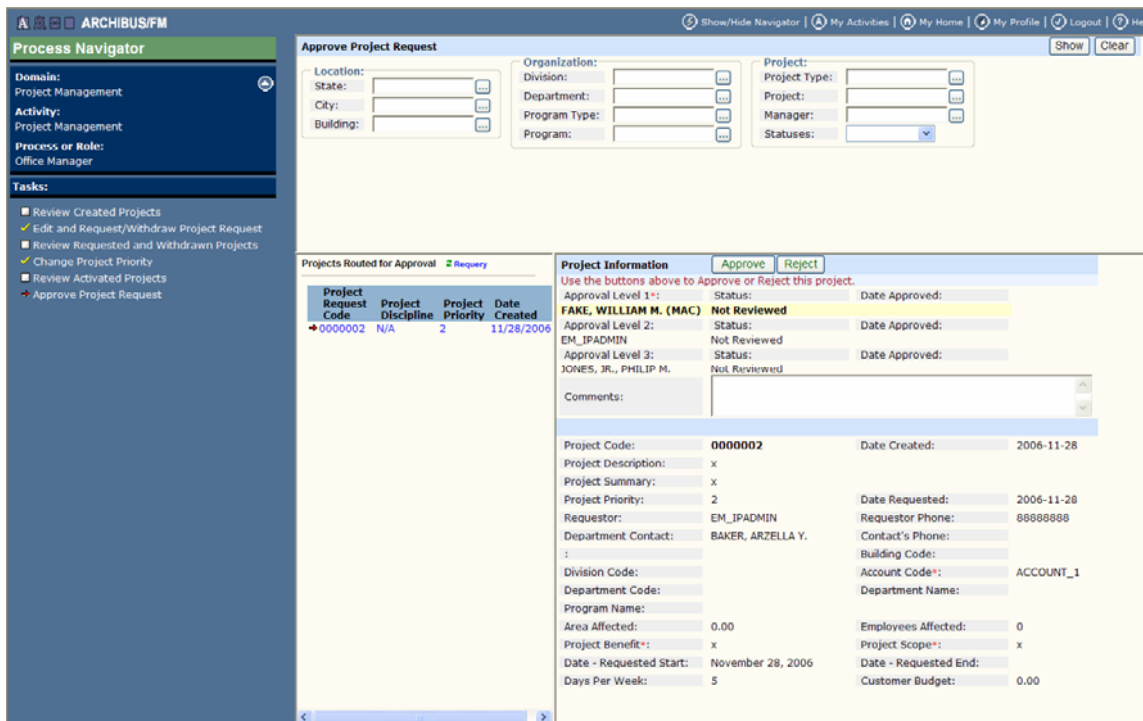
Approve Project Request

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.



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

 Select this button to approve the project.

 Select this button to reject the project.



Project Coordinator Tasks

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

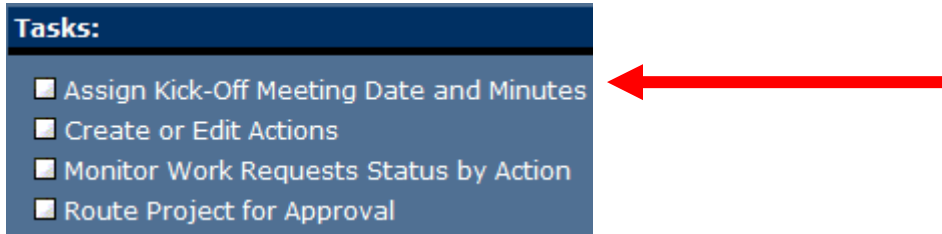
Tasks:

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

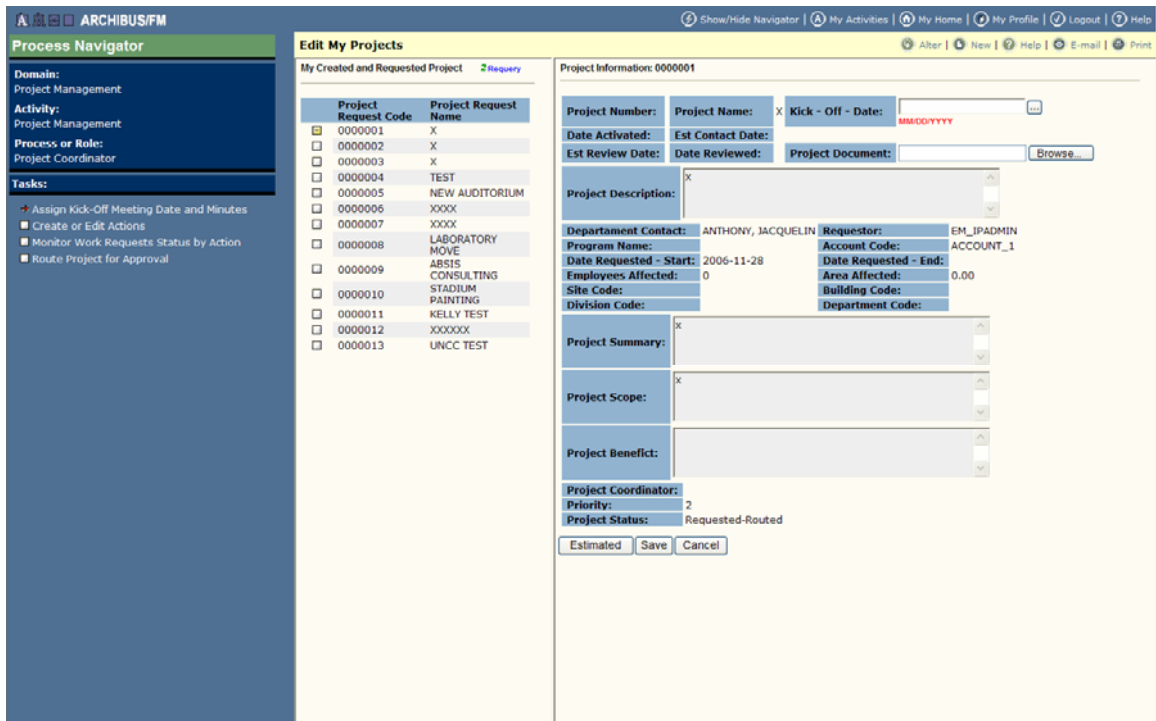
Now we will discuss each of the Tasks one by one.

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.



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



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

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

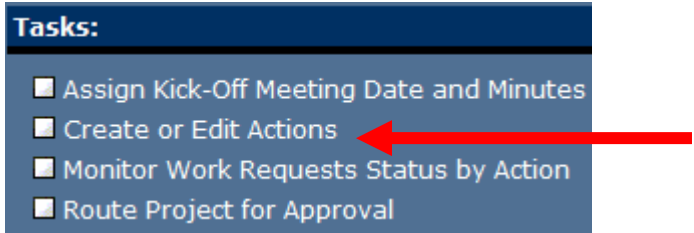
Saves the changes made to the view and the status does not change status.

Cancel

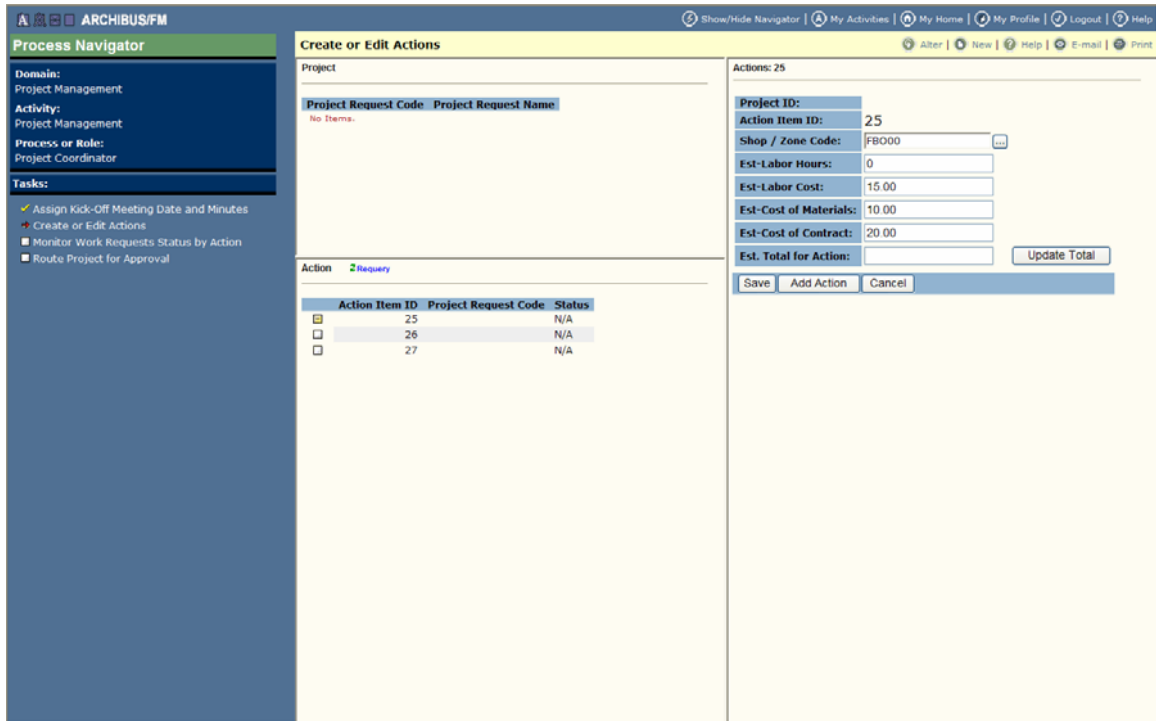
Clear the changes made to the view in that screen.

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.




Below is the Create or Edit Actions View.



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:

- Shop/Zone Code:  The Shop/Zone that will be performing the work.
- 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.

Est. Cost of Materials The estimated cost of materials.
Est. Cost of Contract The estimated cost of contract.
Est. Total for Action The field is automatically updated by the
 button.

Saves the changes made to the view.

This button adds a blank form so that you can add a new action.

Clear the changes made to the view in that screen.

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.

ARCHIBUS/FM
Show/Hide Navigator | My Activities | My Home | My Profile | Logout | Help

Process Navigator
 Domain: Project Management
 Activity: Project Management
 Process or Role: Project Coordinator
Tasks:

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

View Work Request by Action
Alter | New | Help | E-mail | Print

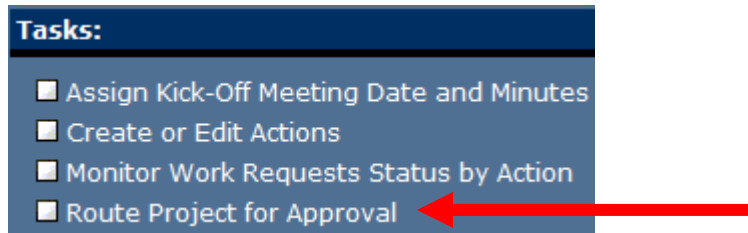
Project Request Name	Project Name	Project Request Code	Project Number	Action Item ID
<input checked="" type="checkbox"/> NEW AUDITORIUM	TEST	0000005	2122	21
<input type="checkbox"/> NEW AUDITORIUM	TEST	0000005	2122	24
<input type="checkbox"/>				25
<input type="checkbox"/>				26
<input type="checkbox"/>				27
<input type="checkbox"/> X		0000001		28
<input type="checkbox"/> X		0000002		29
<input type="checkbox"/> X		0000002		30
<input type="checkbox"/> XXXX	C	0000007	C	41
<input type="checkbox"/> ABSIS CONSULTING	CONSULTING	0000009	2000600001	42
<input type="checkbox"/> X		0000002		61
<input type="checkbox"/> X		0000002		62
<input type="checkbox"/> X		0000001		63
<input type="checkbox"/> X		0000001		64
<input type="checkbox"/> X		0000002		65
<input type="checkbox"/> X		0000003		66
<input type="checkbox"/> X		0000002		67
<input type="checkbox"/> X		0000002		68
<input type="checkbox"/> X		0000002		69
<input type="checkbox"/> XXXX	X	0000006	X	70
<input type="checkbox"/> XXXX	X	0000006	X	71
<input type="checkbox"/> XXXX	X	0000006	X	72
<input type="checkbox"/> XXXX	X	0000006	X	73
<input type="checkbox"/> XXXX	X	0000006	X	74
<input type="checkbox"/> X		0000001		75
<input type="checkbox"/> STADIUM PAINTING		0000010		76
<input type="checkbox"/> STADIUM PAINTING		0000010		77
<input type="checkbox"/> STADIUM PAINTING		0000010		78
<input type="checkbox"/> STADIUM PAINTING		0000010		79
<input type="checkbox"/> TEST	XXX	0000004	XXX	80
<input type="checkbox"/> X		0000001		81
<input type="checkbox"/> X		0000001		82

Work Requests: 2006000013

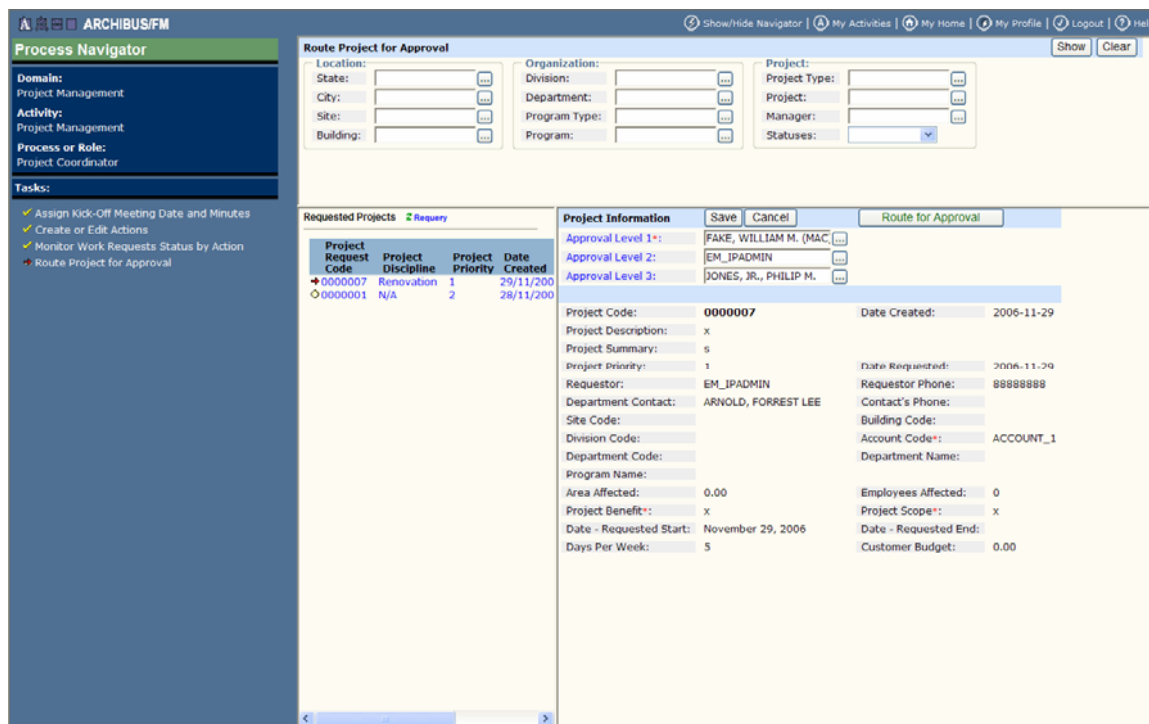
Work Request Code	2006000013
Problem Type	EL-FIREALARM
Work Request Status	R
Requested by	EM_IPADMIN
Requestor's Phone #	88888888
Building Code	
Floor Code	
Room Code	
Problem Location	
Date Work Requested	2006-11-29
Date to Perform	
Division Code	
Department Code	
Account Code	ACCOUNT_2
Equipment Code	
Work Description	

Route Projects for Approval

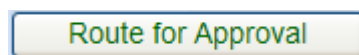
To approve activated projects select, "Approve Project Request" on the Tasks portion of the Process Navigator.



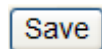
Below is the Approve Project Request View.



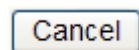
The Project Coordinator will initiate the approval process to the three levels.



This initiates the request for approval.



Saves the changes made to the view.



Clear the changes made to the view in that screen.



AVC Tasks

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

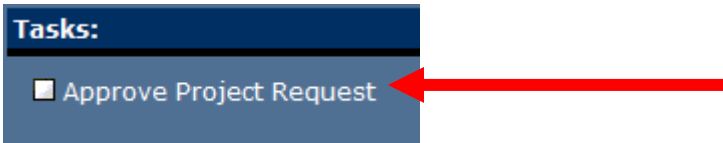
Tasks:

Approve Project Request

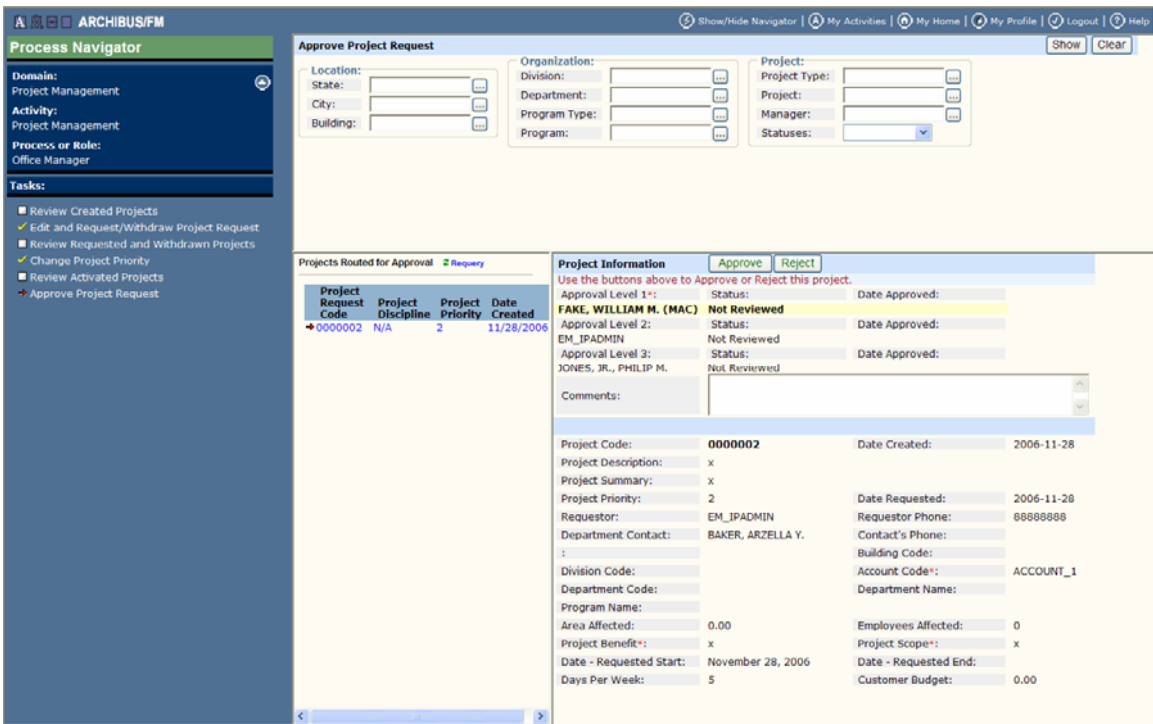
Now we will discuss each of the Tasks one by one.

Approve Project Request

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



Below is the Approve Project Request View.



Projects Routed for Approval

Project Request Code	Project Discipline	Project Priority	Date Created
0000002	N/A	2	11/28/2006

Project Information

Use the buttons above to Approve or Reject this project.

Approval Level 1: **FAKE, WILLIAM M. (MAC)** Status: **Not Reviewed** Date Approved: _____

Approval Level 2: EM_IPADMIN Status: Not Reviewed Date Approved: _____

Approval Level 3: JONES, JR., PHILIP M. Status: Not Reviewed Date Approved: _____

Comments: _____

Project Code: **0000002** Date Created: 2006-11-28

Project Description: x

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: _____

Division Code: _____ Building Code: _____

Department Code: _____ Account Code: ACCOUNT_1

Program Name: _____ Department Name: _____

Area Affected: 0.00 Employees Affected: 0


Project Benefits: 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 AVC has final of approval after the Customer.

 Select this button to approve the project.

 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



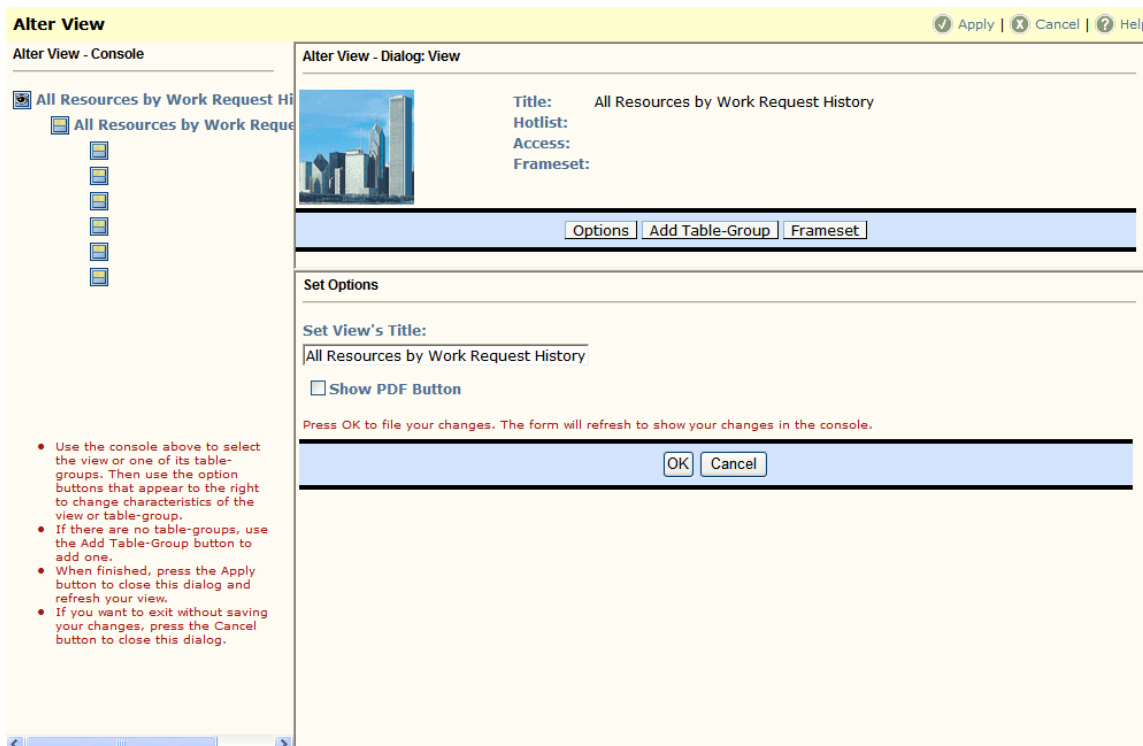
E-mail

E-mail will let you send the result via E-mail



Print

Will print your result to the printer of your choice

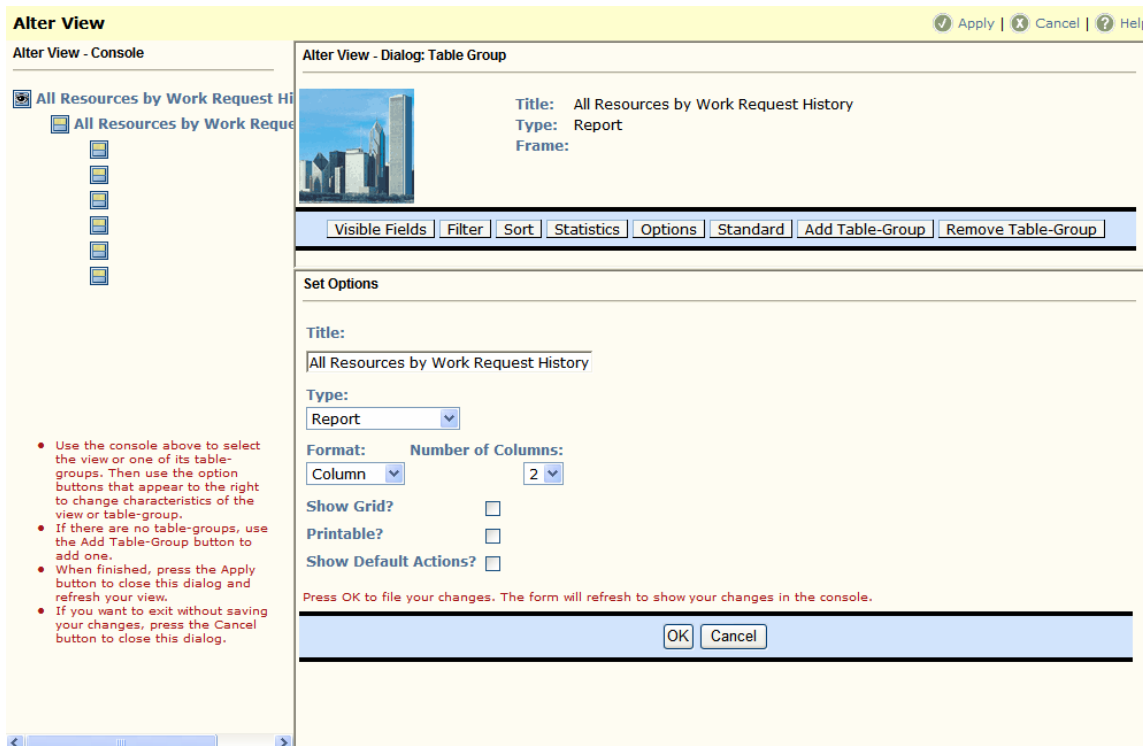


Options

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



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

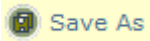
Statistics Will let you set the statistics like total, average, mean ... to your view

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



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
