Training Outline
ARCHIBUS/FM Web Central
For Informal Projects

Prepared For: The University of North Carolina Charlotte

UNC CHARLOTTE

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AOS

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.

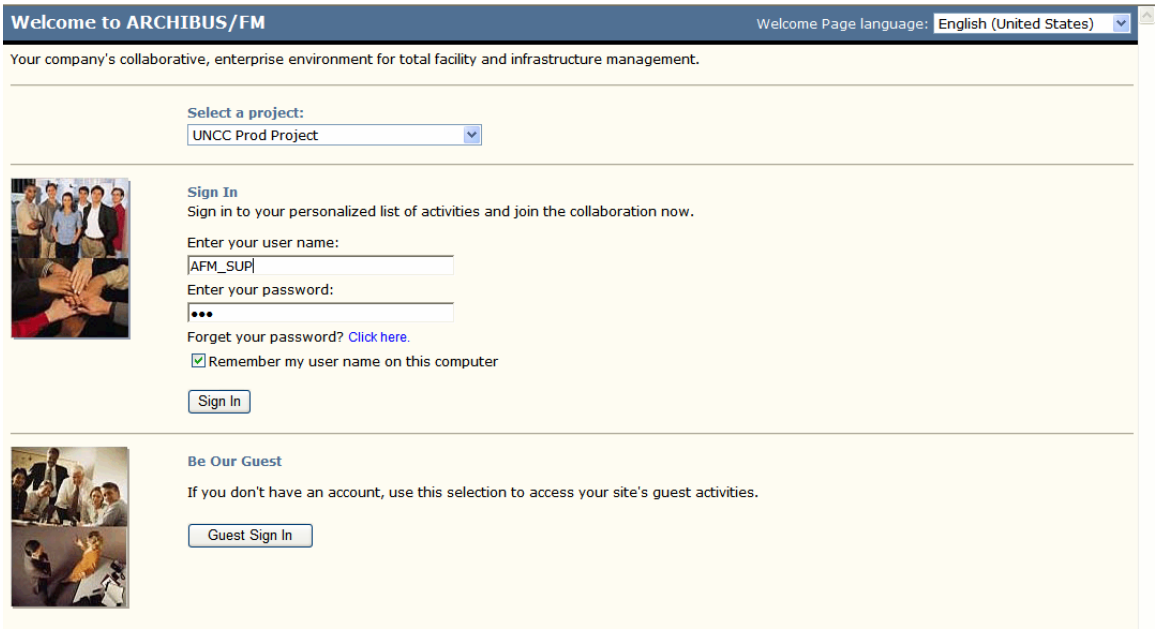
Key Definitions and Concepts

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

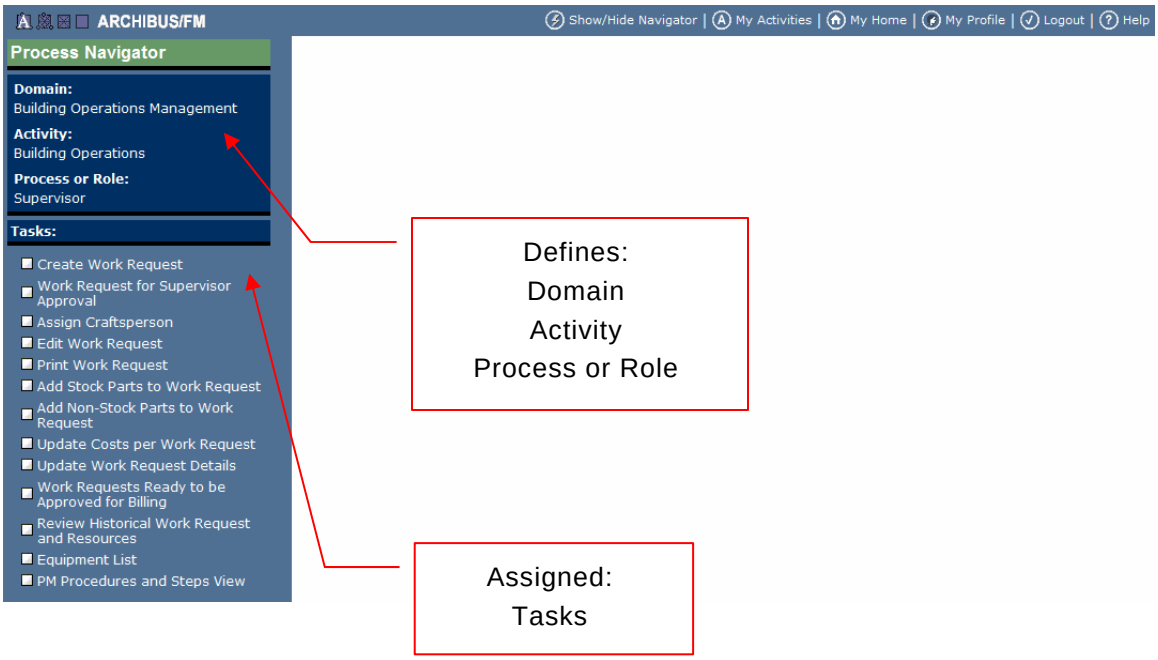
- Launch your Internet Explore
- Enter the web address of the ARCHIBUS/FM Web Central **http:\\BLD05.uncc.edu:8080**
- Type your User Name and Password on the Login Page.



- Select the “Sign In” Button

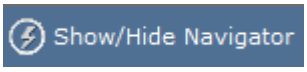
Basic Navigation of ARCHIBUS/FM Web Central

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

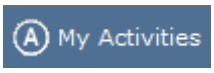


Your button choices along the top of the page

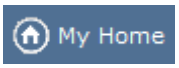
Link to the Archibus Web Site



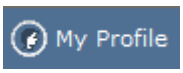
Shows or Hides the Process Navigator



Displays a list of your assigned activities

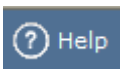


Returns to the user defined home page



Displays your User Profile of ARCHIBUS/FM Web Central

Will Log you out of ARCHIBUS/FM Web Central

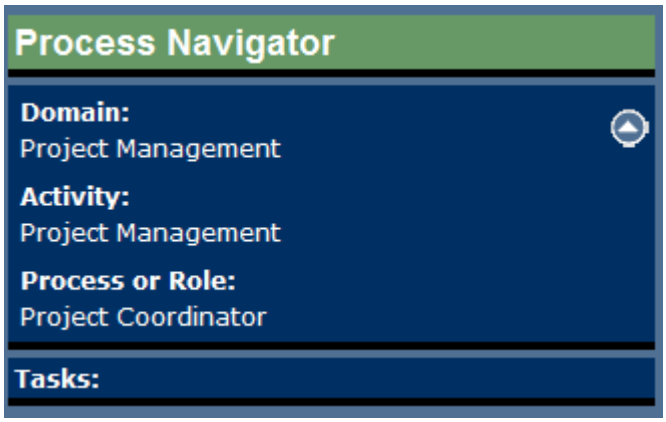


Takes you the HTML Help Pages for ARCHIBUS/FM

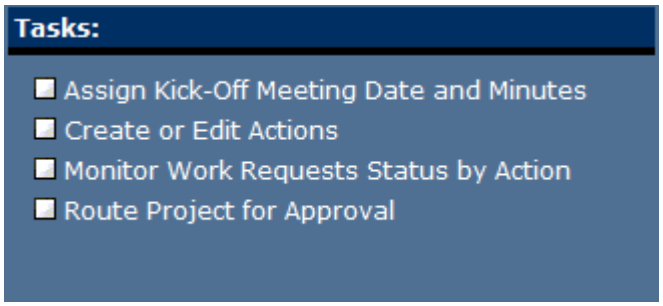
The Process Navigator

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.



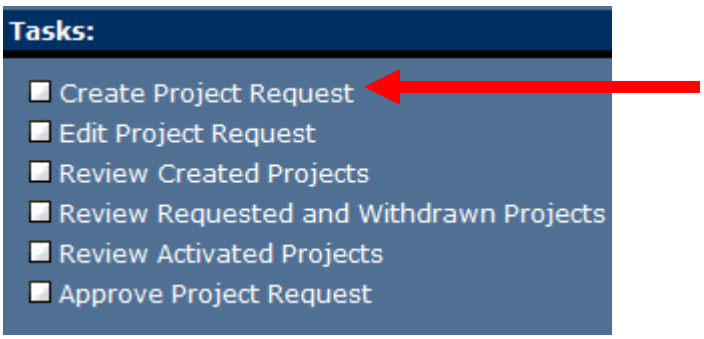
Customer Tasks

The selection of Customer Tasks are limited to the following:

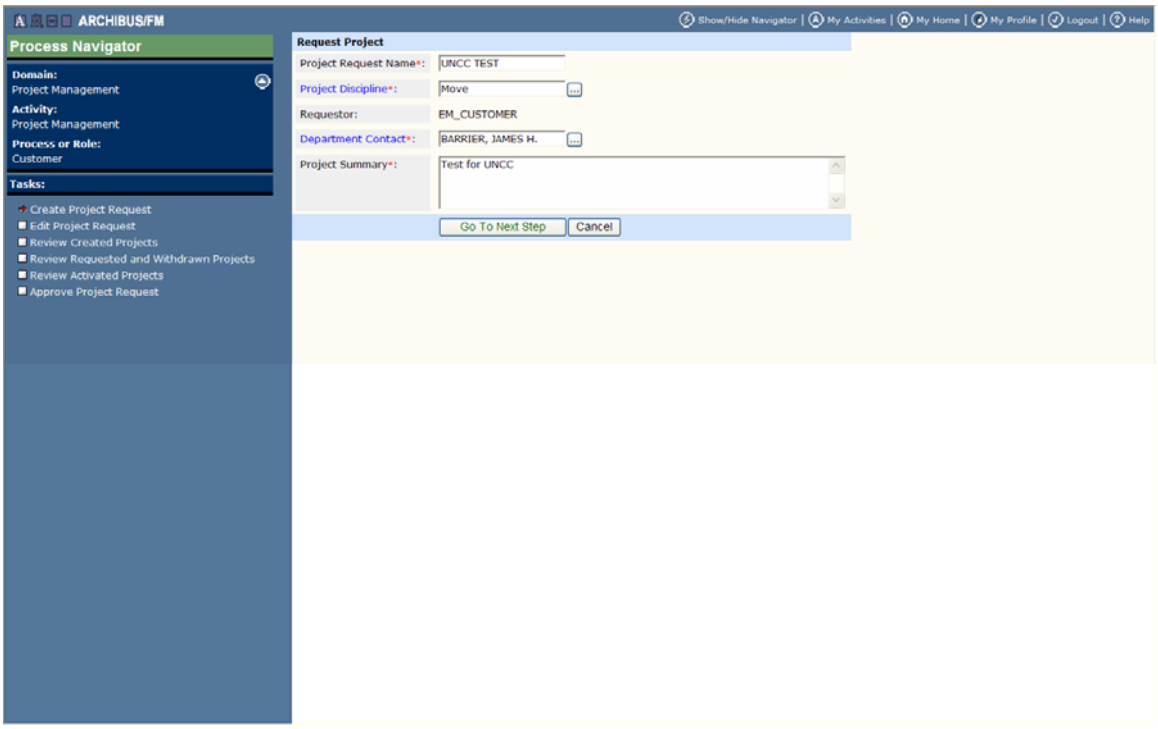
Now we will discuss each of the Tasks one by one.

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.



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

Fields	**Description of Fields**
Project Request Name:	Name of the Project the request by the customer.
Project Discipline:	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

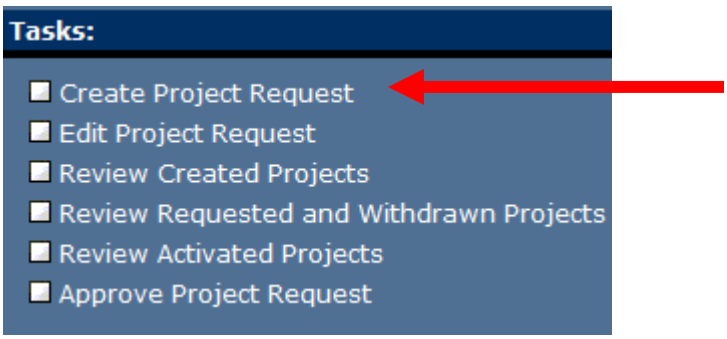
Once you select "Go to Next Step", it gives you a screen to add details to the project request.

Cancel

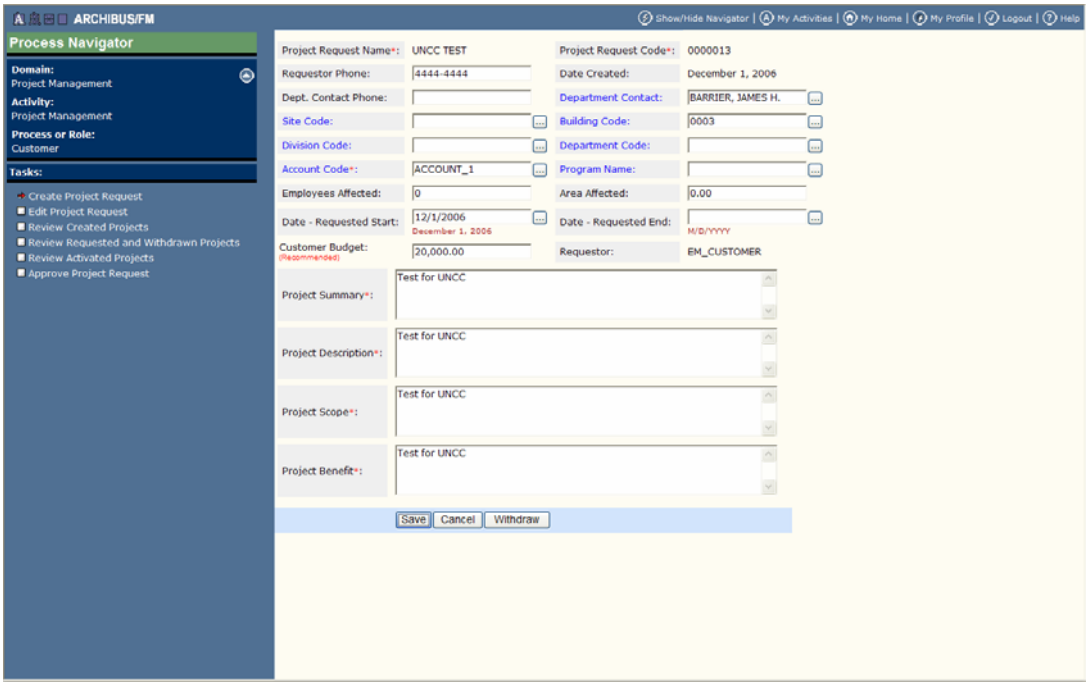
Clear the changes made to the Work Request in that screen.

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.



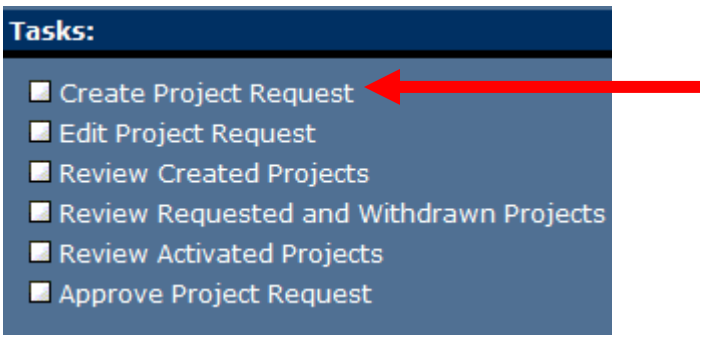
The fields below can be edited from this view:

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.

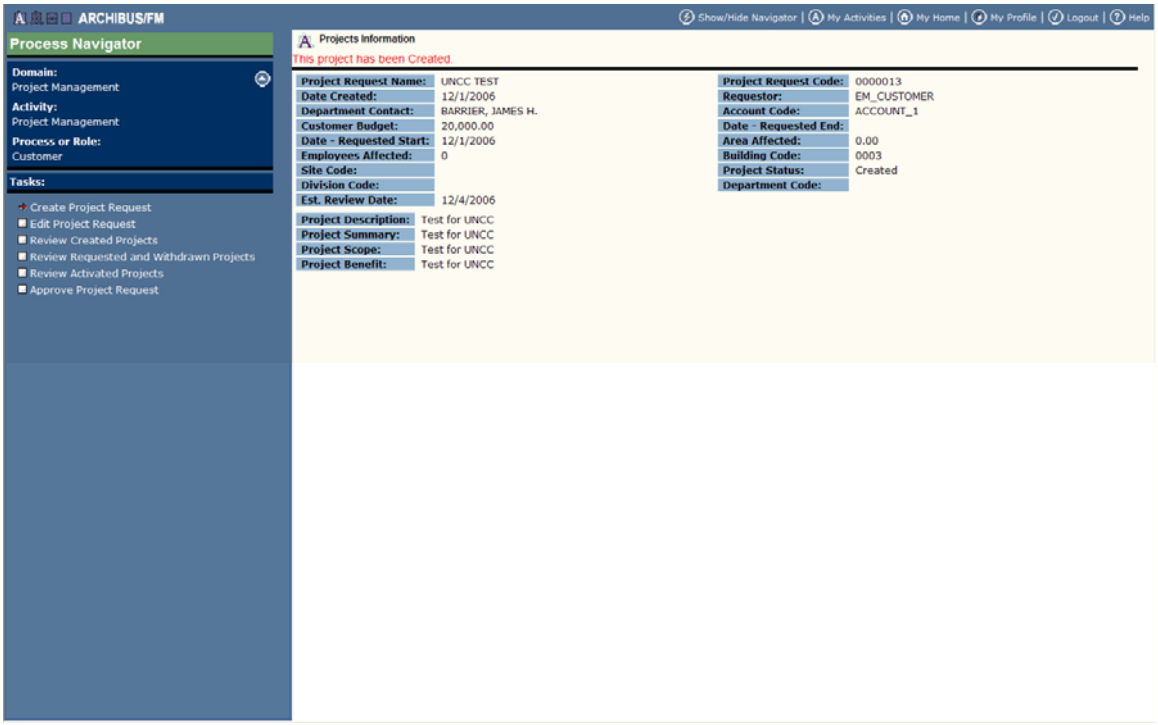
Save	Saves the changes made to the Project Request and changes the status to "Created".
Cancel	Clear the changes made to the Project Request in that screen.
Withdraw	If the Customer does not choose to create the Project, he/she may withdraw the request.

Create Project Request Screen 3

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

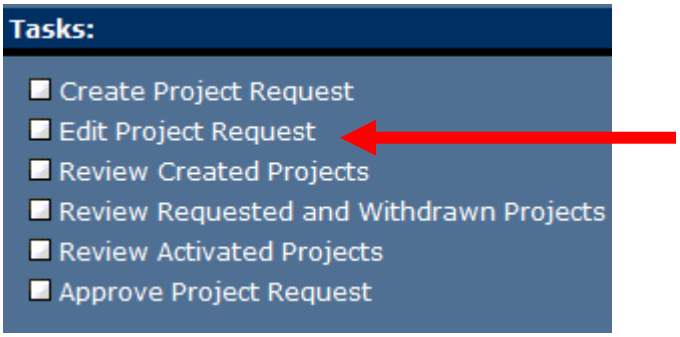


The Create Project Request View appears similar to the sample screen below.

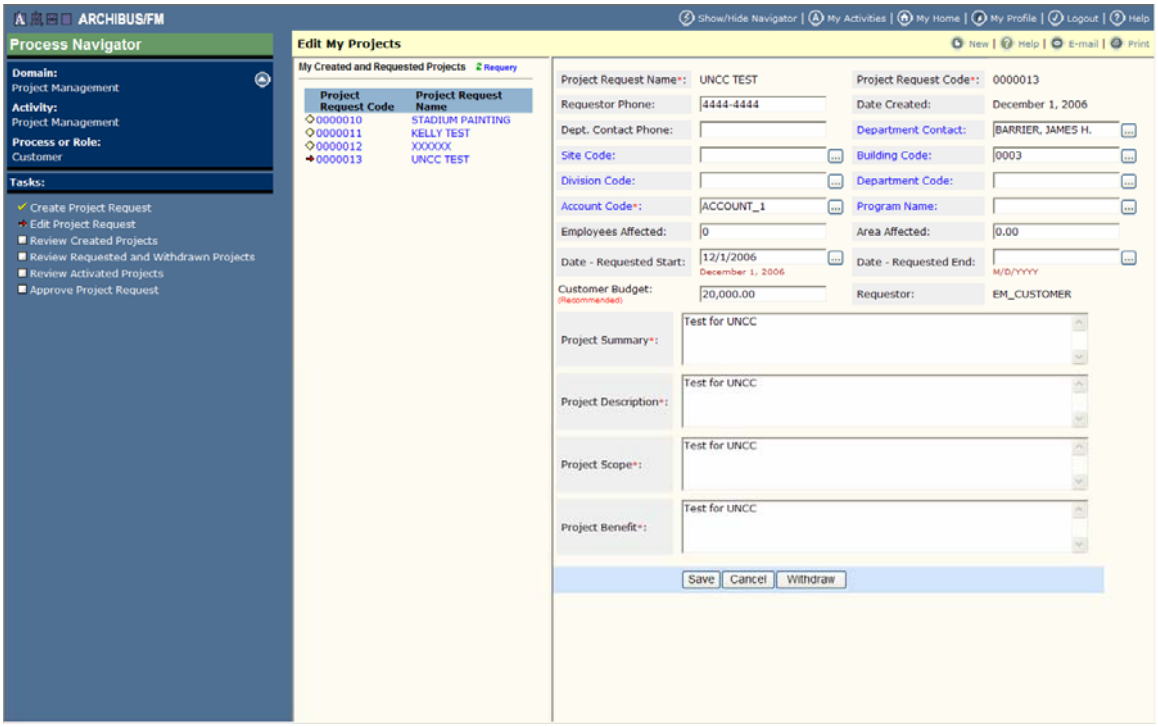


Edit Project Requests

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:

<u>Requestor’s Phone</u>: Phone number of the requestor.

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

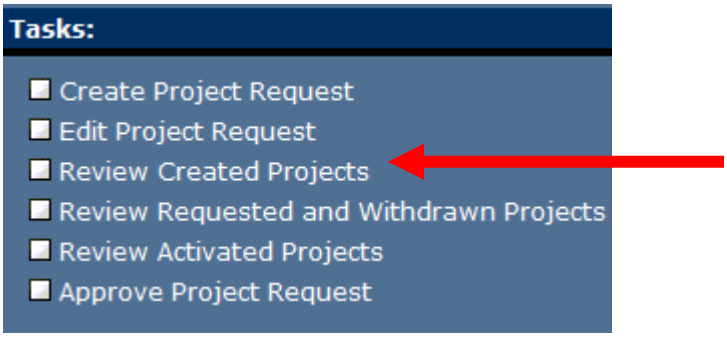
Department Contact: ... Department contact for the project

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.

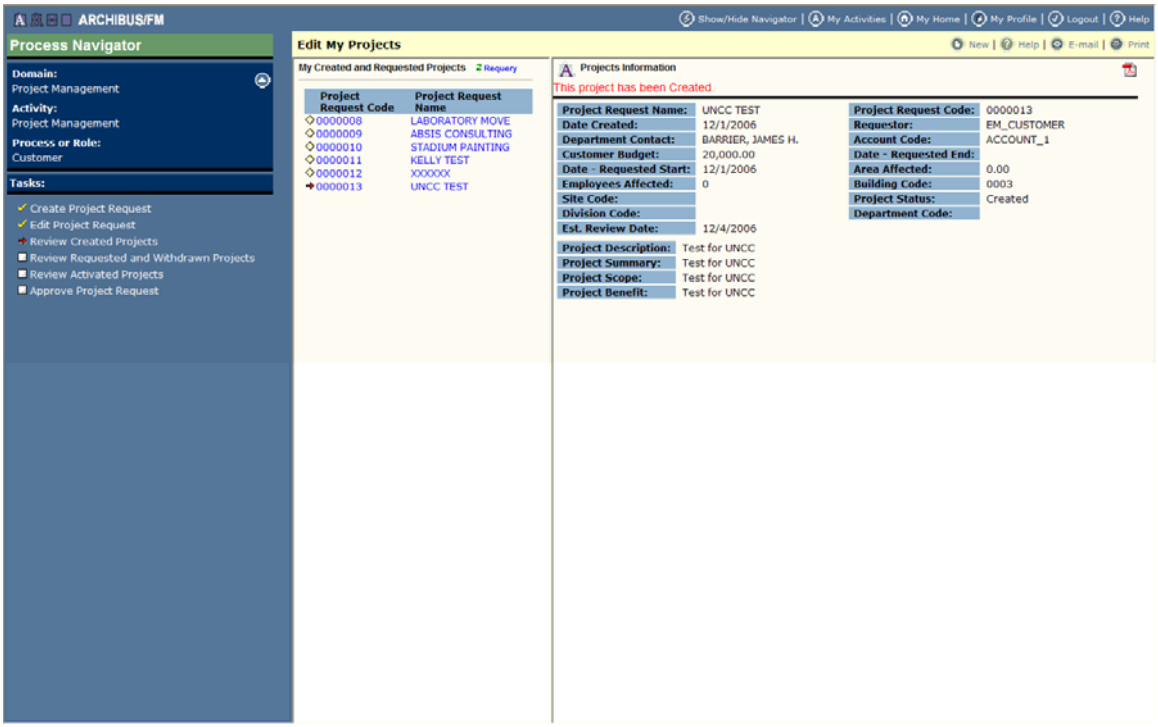
Save	Saves the changes made to the Project Request and changes the status to “Created”.
Cancel	Clear the changes made to the Project Request in that screen.
Withdraw	If the Customer does not choose to create the Project, he/she may withdraw the request.

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.



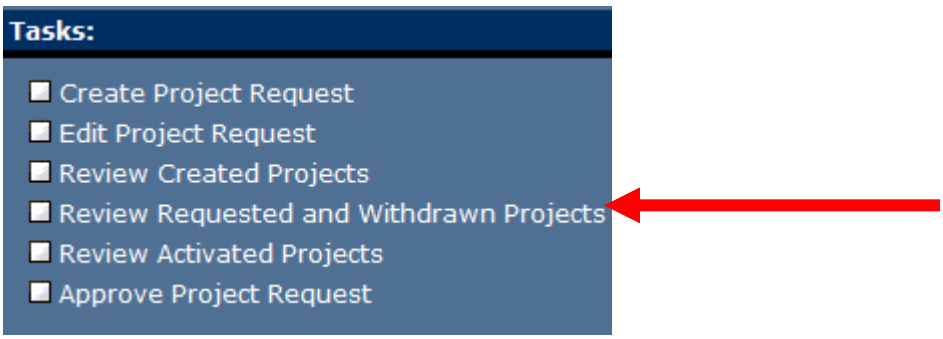
Select the Project Request you wish to view and Print.



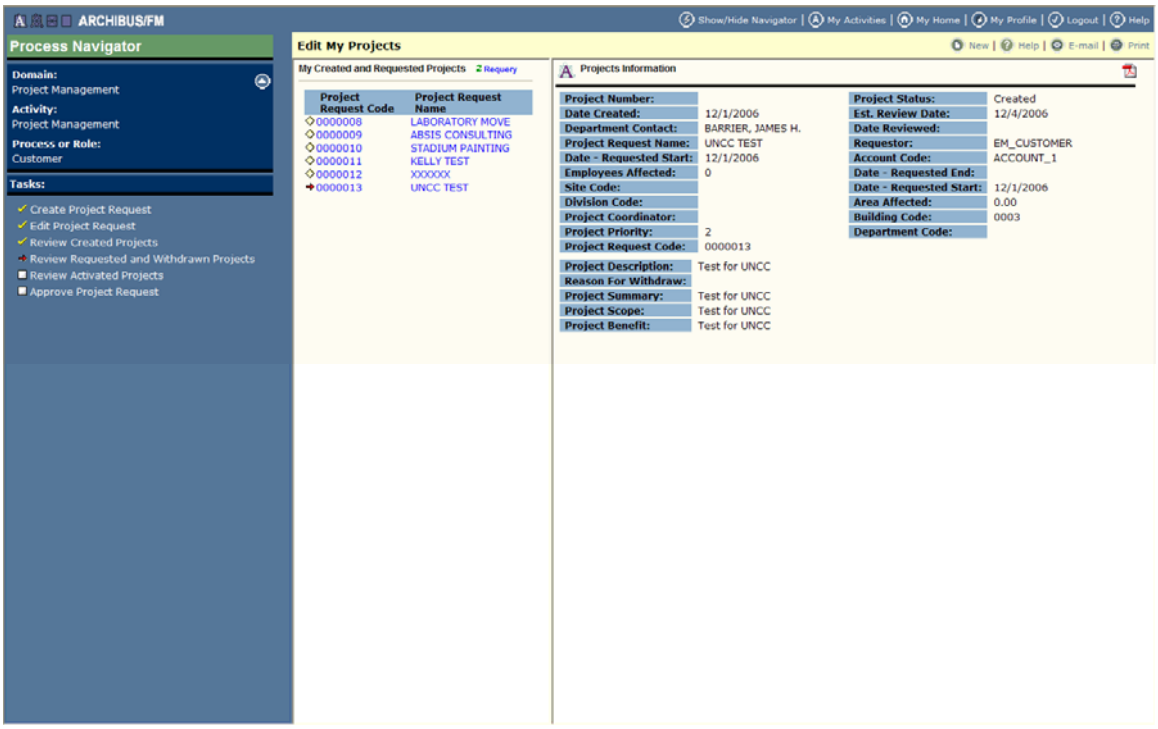
You can select Print on your browser. If you wish to create a PDF of the Project Request simply select the PDF Icon .

Review Requested and Withdrawn Projects

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



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

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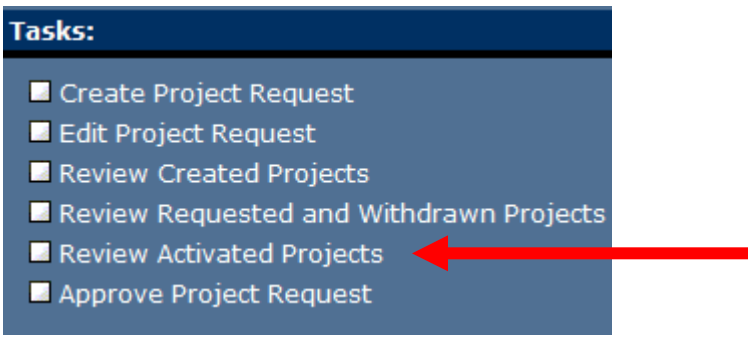
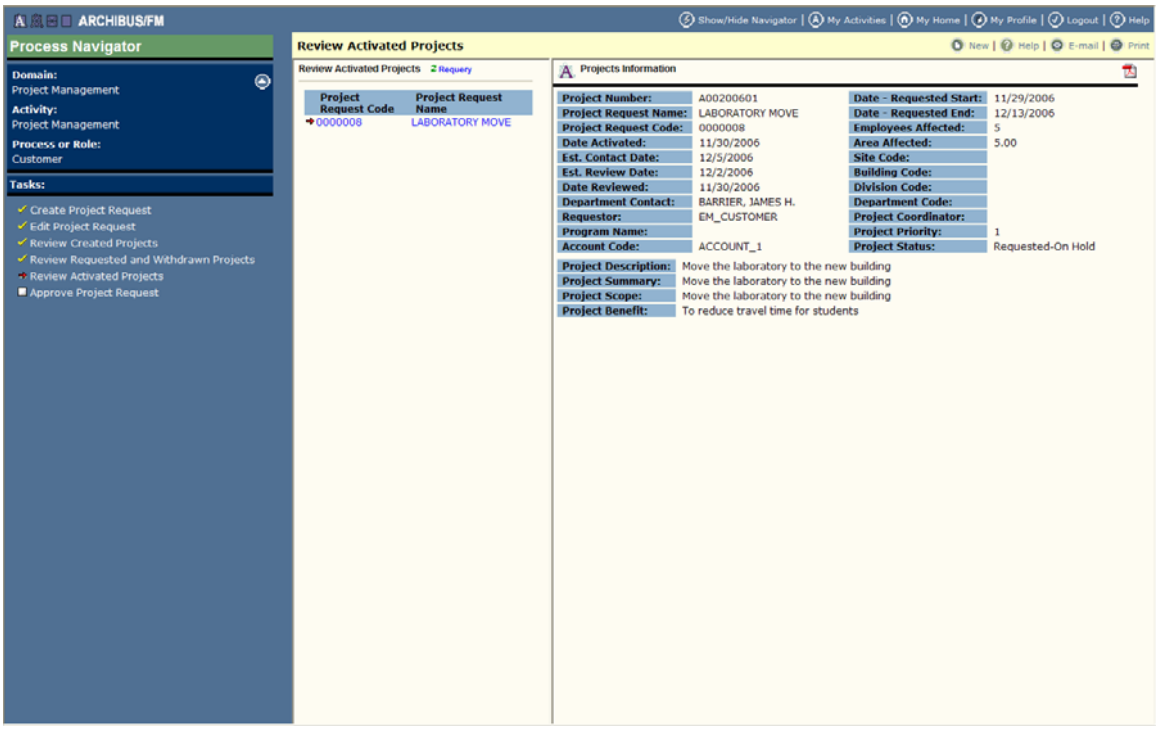
Review Activated Projects

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

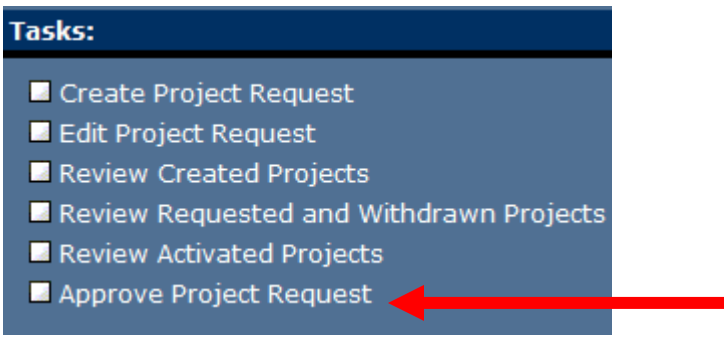


Below is the Add Non-stock Part to Work Request View.

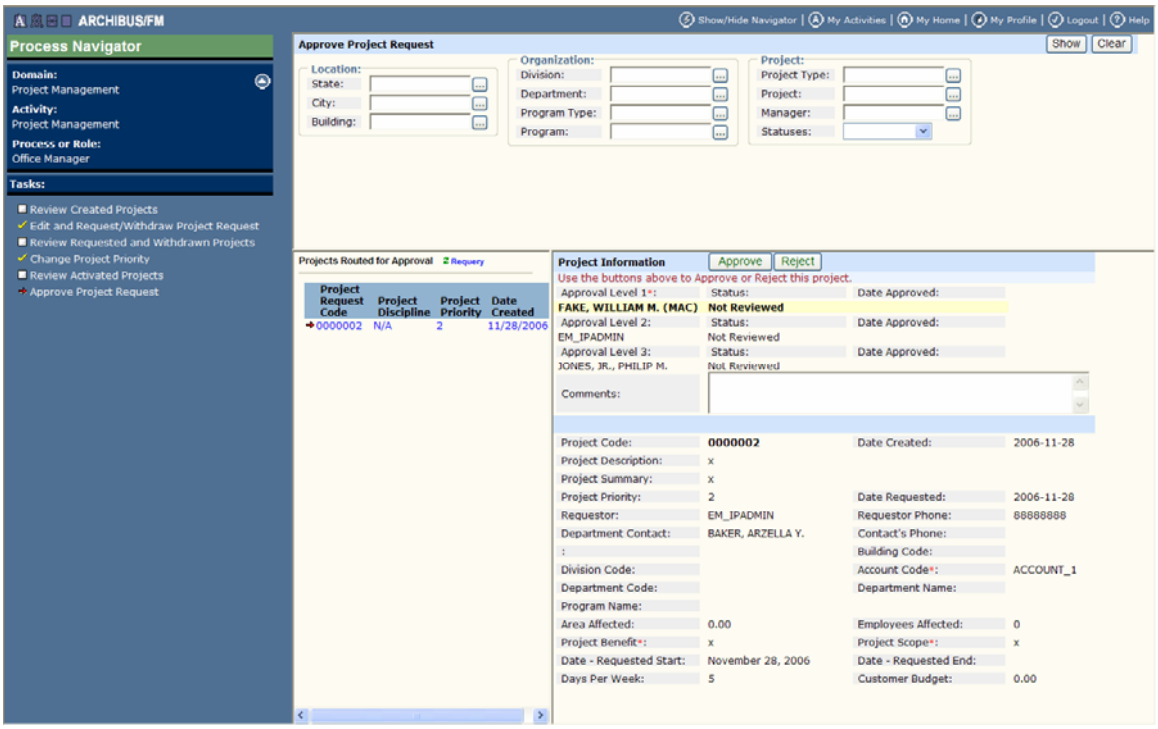


Approve Project Request

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



Below is the Approve Project Request View.



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.

Reject — Select this button to reject the project.

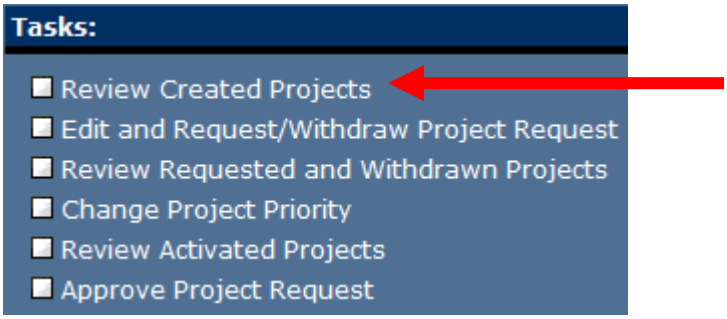
Office Manager/Design Supervisor Tasks

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

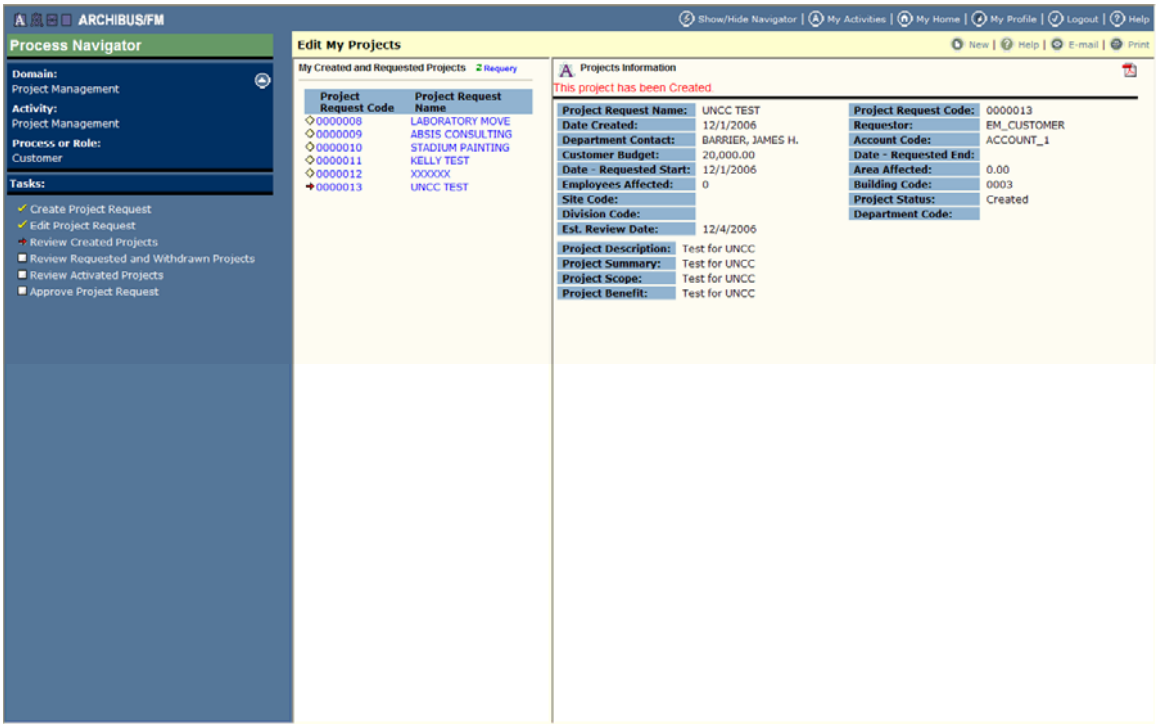
Now we will discuss each of the Tasks one by one.

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.



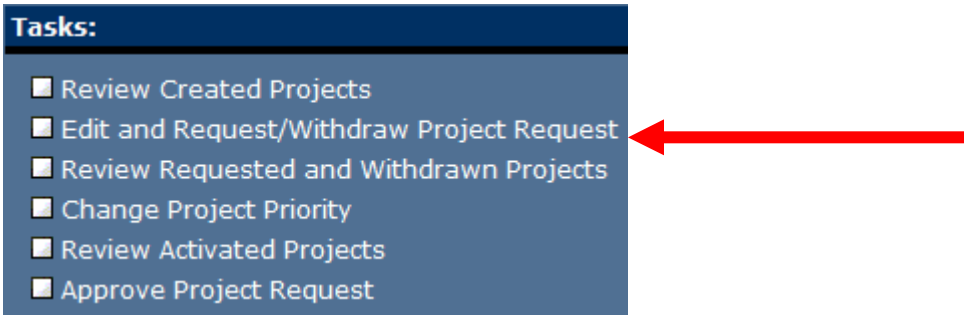
Select the Project Request you wish to view and Print.



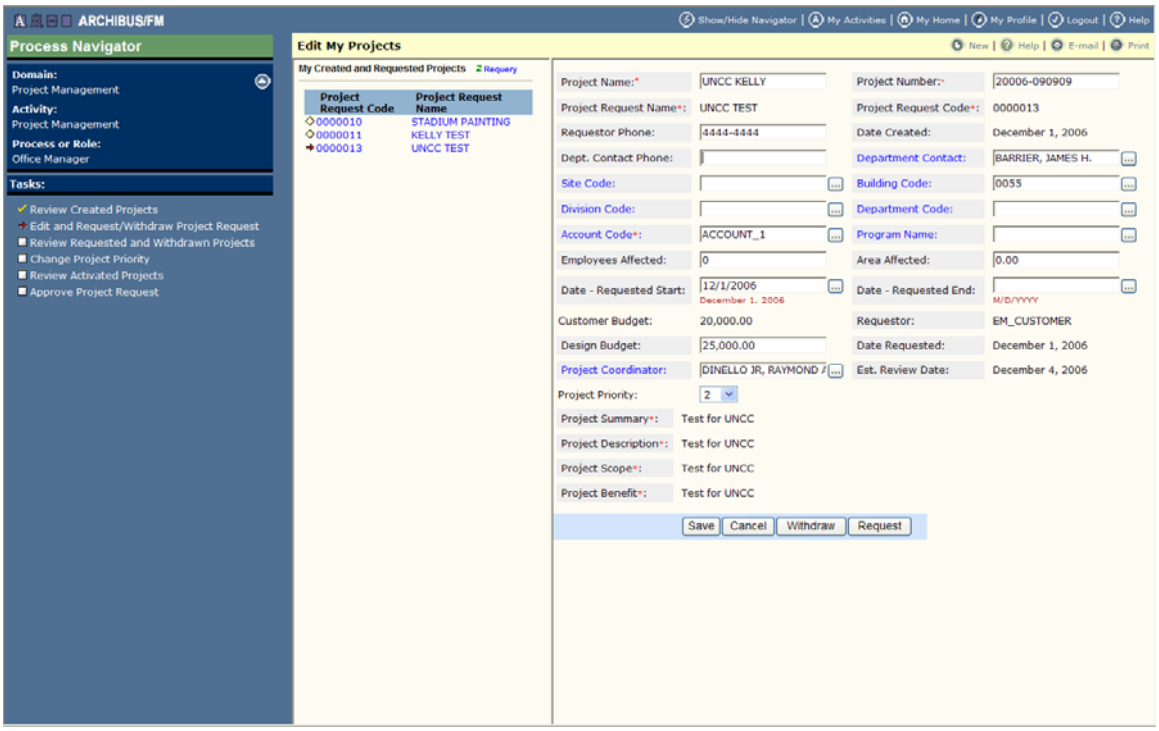
You can select Print on your browser. If you wish to create a PDF of the Project Request simply select the PDF Icon .

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.



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.

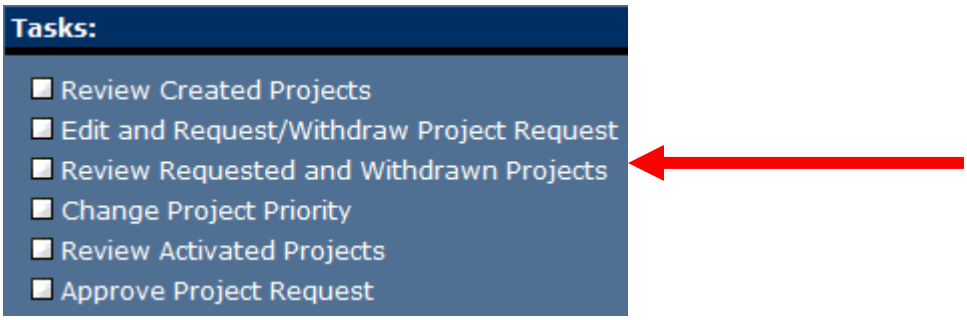
Project Number: Assigns the project number given by Design Services

Department Contact Phone: ... Department contact for the project

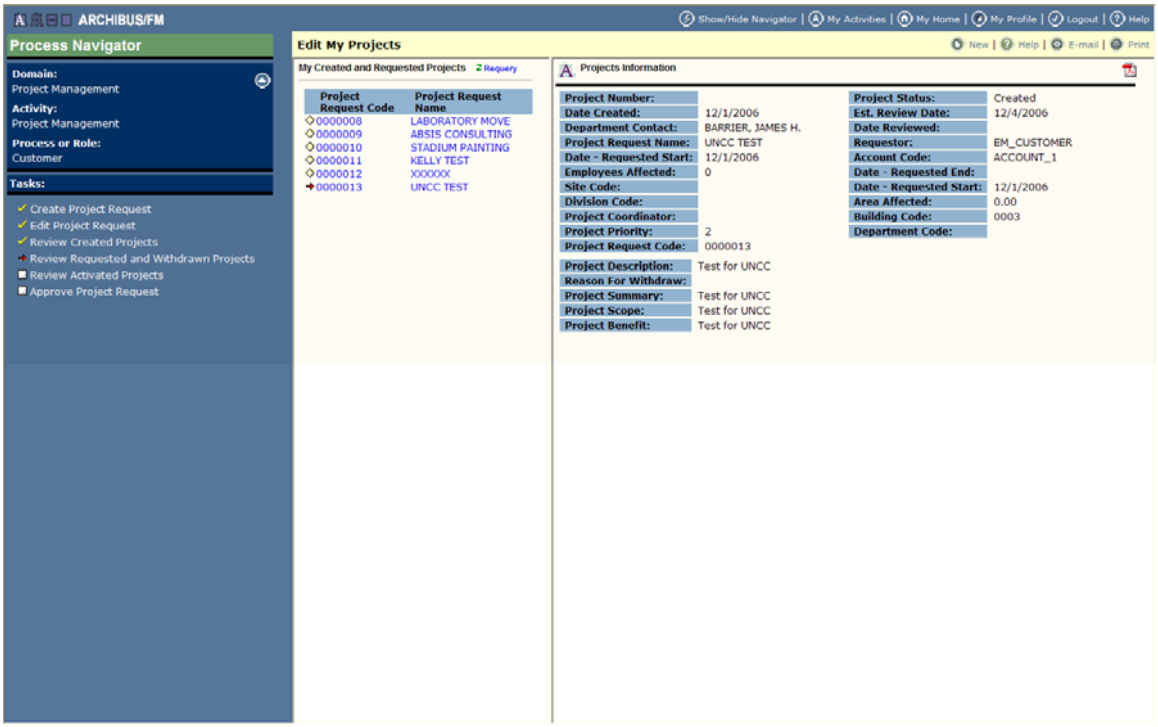
Building Code:	Building the project will happen in.
Design Budget:	Design Services overall budget estimate
Project Coordinator:	Assigns the project manager to the project
Priority:	Assigns project priority based the lowest default project priority. Default value is 2. You can select 2-10.
Save	Saves 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.



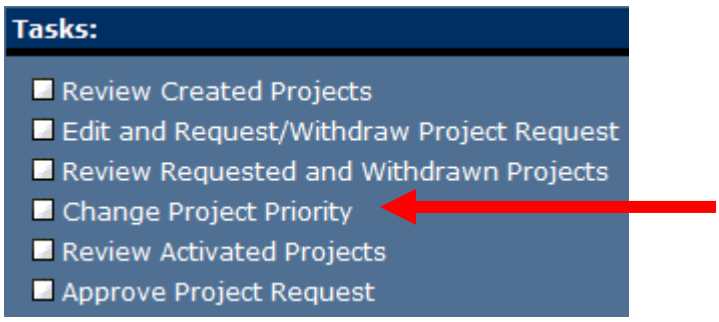
Below is the Review Requested and Withdrawn Projects View.



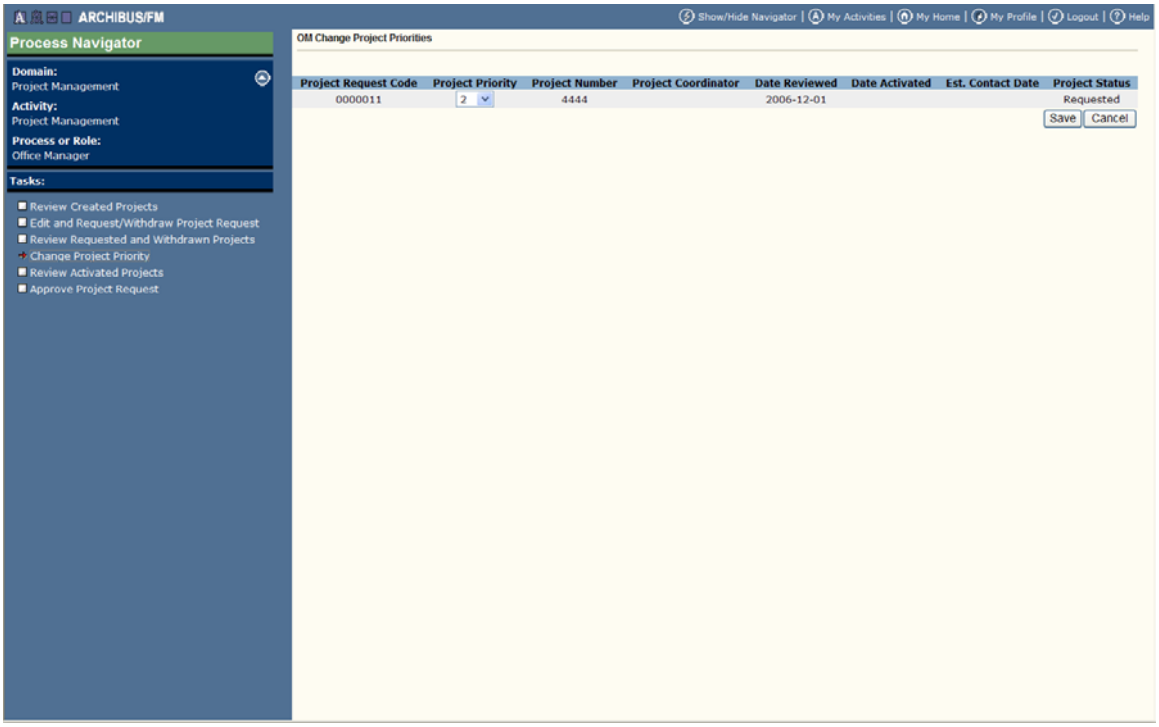
You can select Print on your browser. If you wish to create a PDF of the Project Request simply select the PDF Icon.

Change Project Priority

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



Below is the Change Project Priorities view.

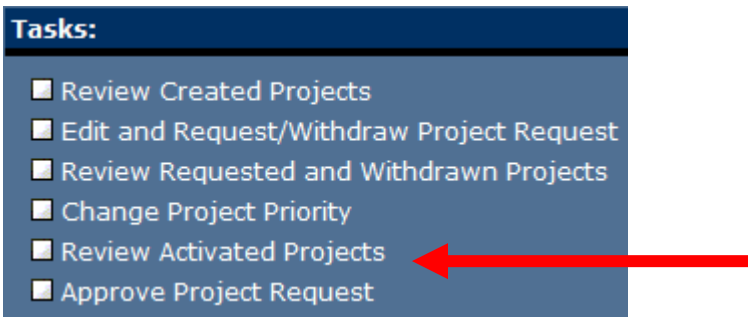


This view allows the Office Manager to update project priorities. If the project is changed to a priority1 the field “Date Activated” will be populated.

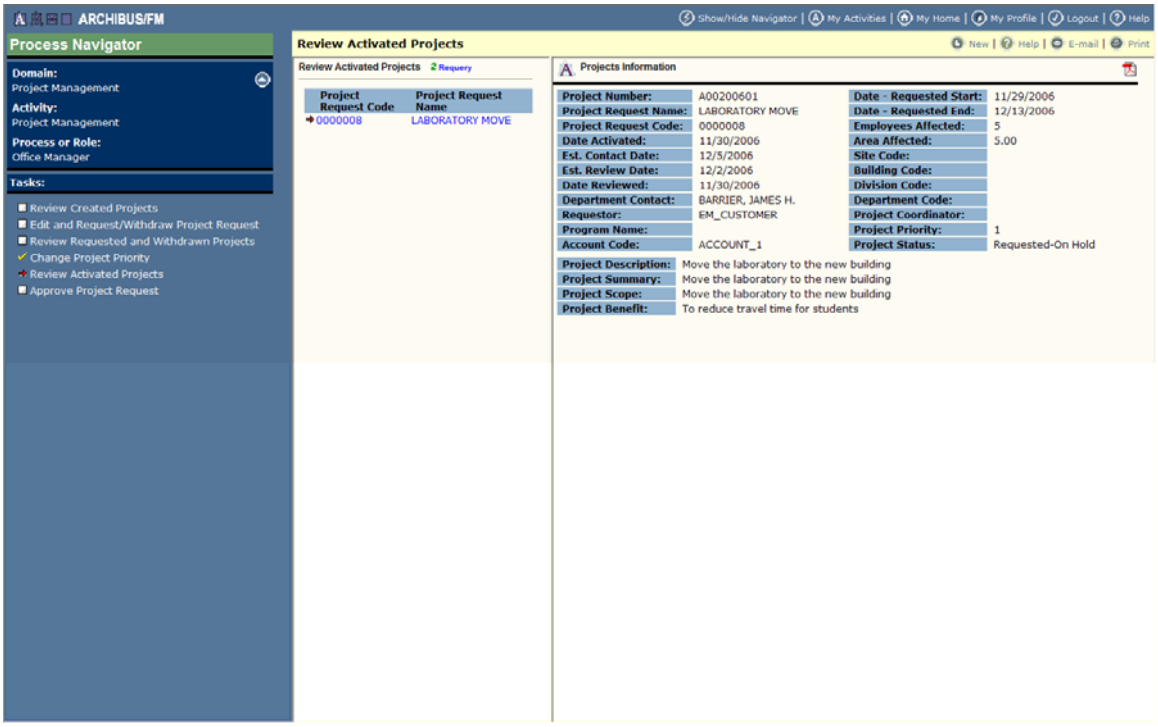
Save	Saves the changes made to the Project Priority and the status does not change.
Cancel	Clear the changes made to the Project Priority in that screen.

Review Activated Projects

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



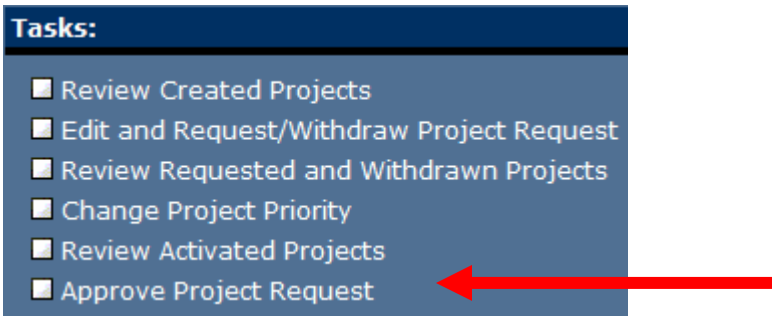
Below is the Review Acitvated Projects view.



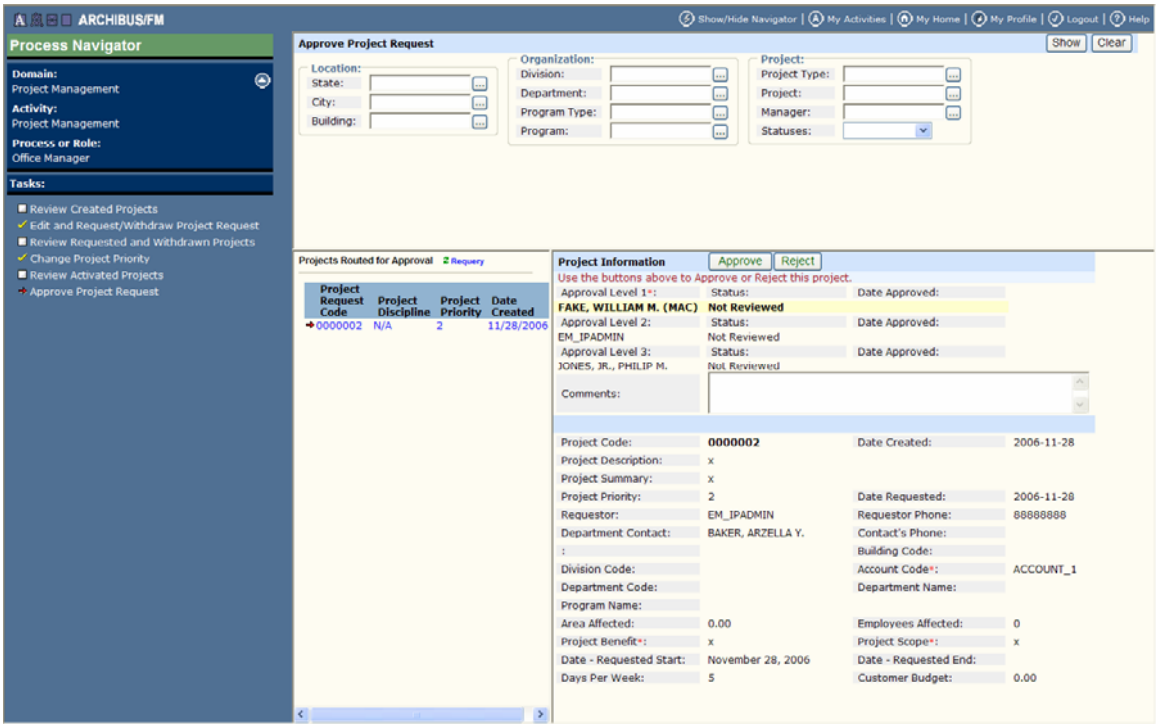
You can select Print on your browser. If you wish to create a PDF of the Project Request simply select the PDF Icon.

Approve Project Request

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



Below is the Approve Project Request View.



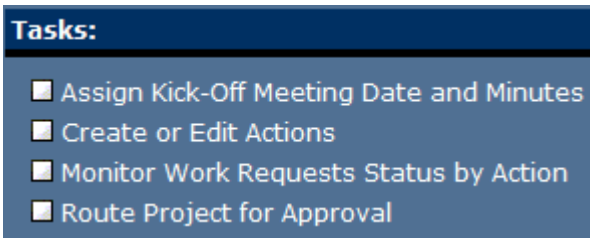
There are 3 levels of approval. The Office Manager / Design Supervisor have the first level of approval before the Design Supervisor.

Approve — Select this button to approve the project.

Reject — Select this button to reject the project.

Project Coordinator Tasks

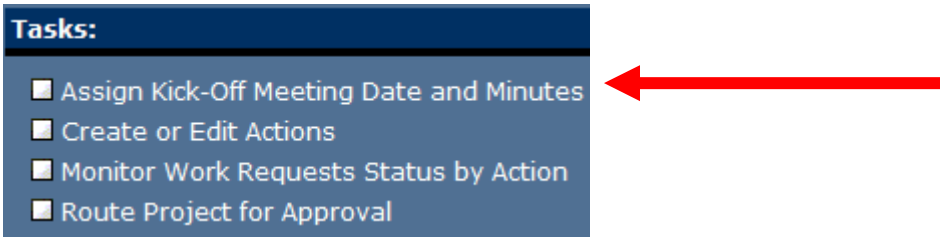
The selection of Project Coordinator Tasks are limited to the following:



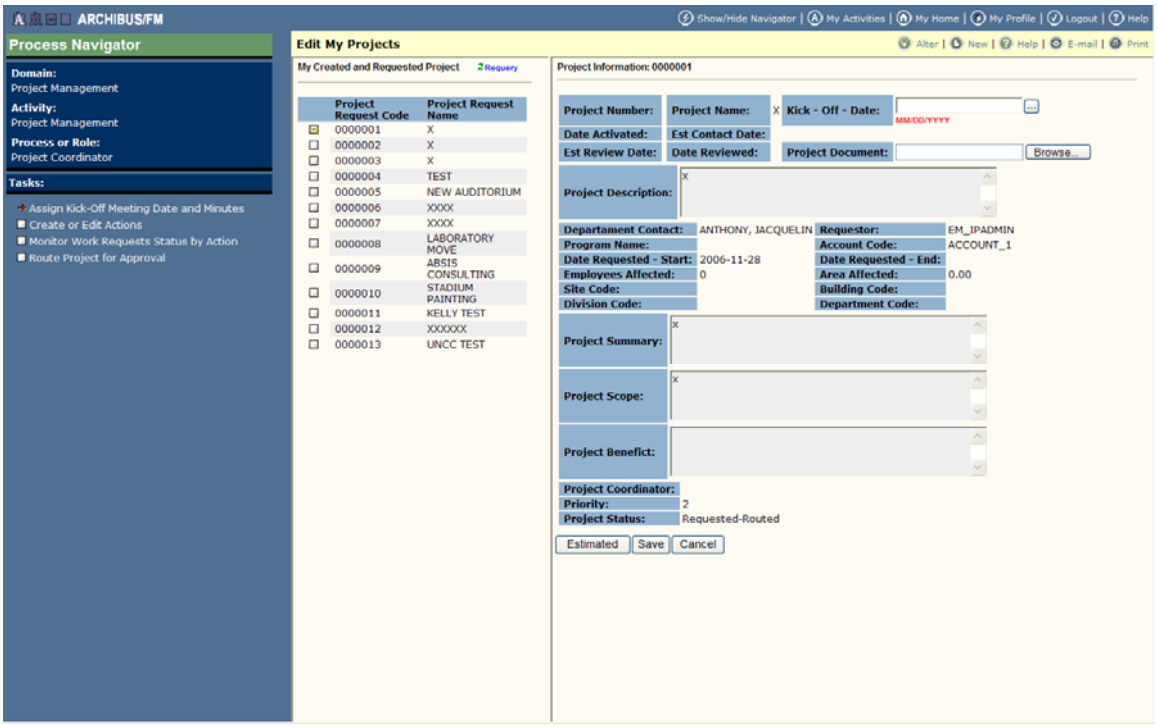
Now we will discuss each of the Tasks one by one.

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:

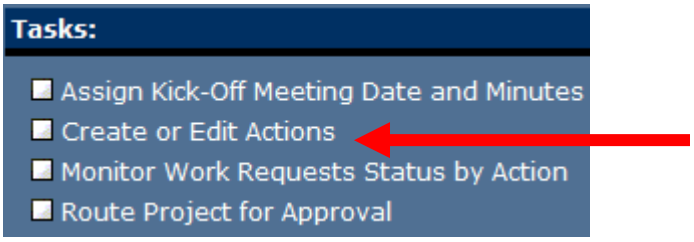
Kick-Off Meeting Date: ... Enter in the date that the initial kick-off meeting took place.

Project Document: Attach the meeting minute document file to the project request

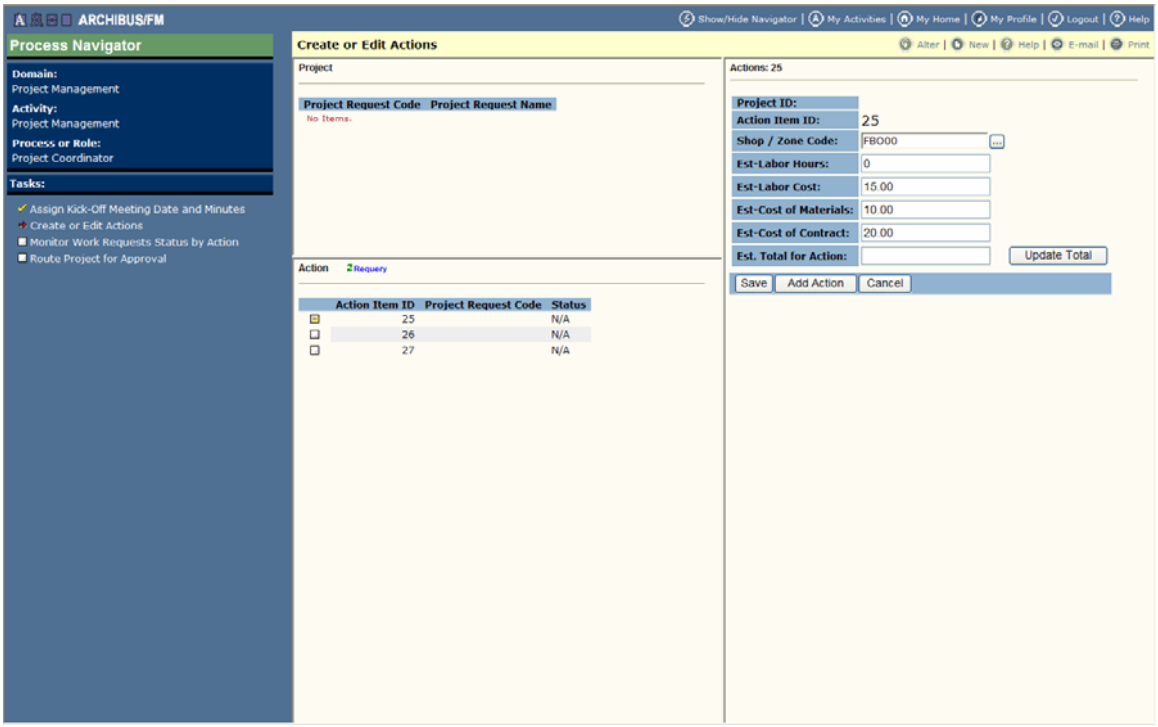
Estimate	Once the meeting information is filled out than the Project Coordinator can select the Estimate button. This changes the status to Requested-Estimated.
Save	Saves the changes made to the view and the status does not change status.
Cancel	Clear the changes made to the view in that screen.

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.

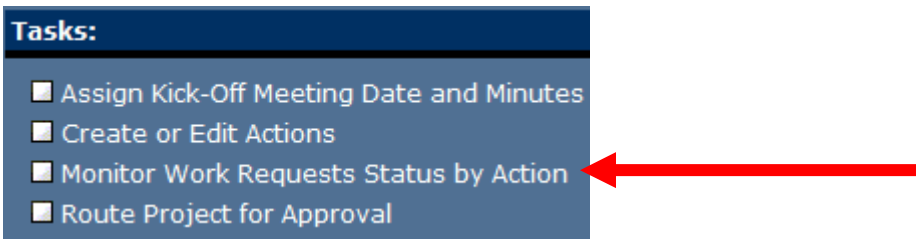
Est. Labor Hours: The estimated number of hours the Shop/Zone will work on the project.

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

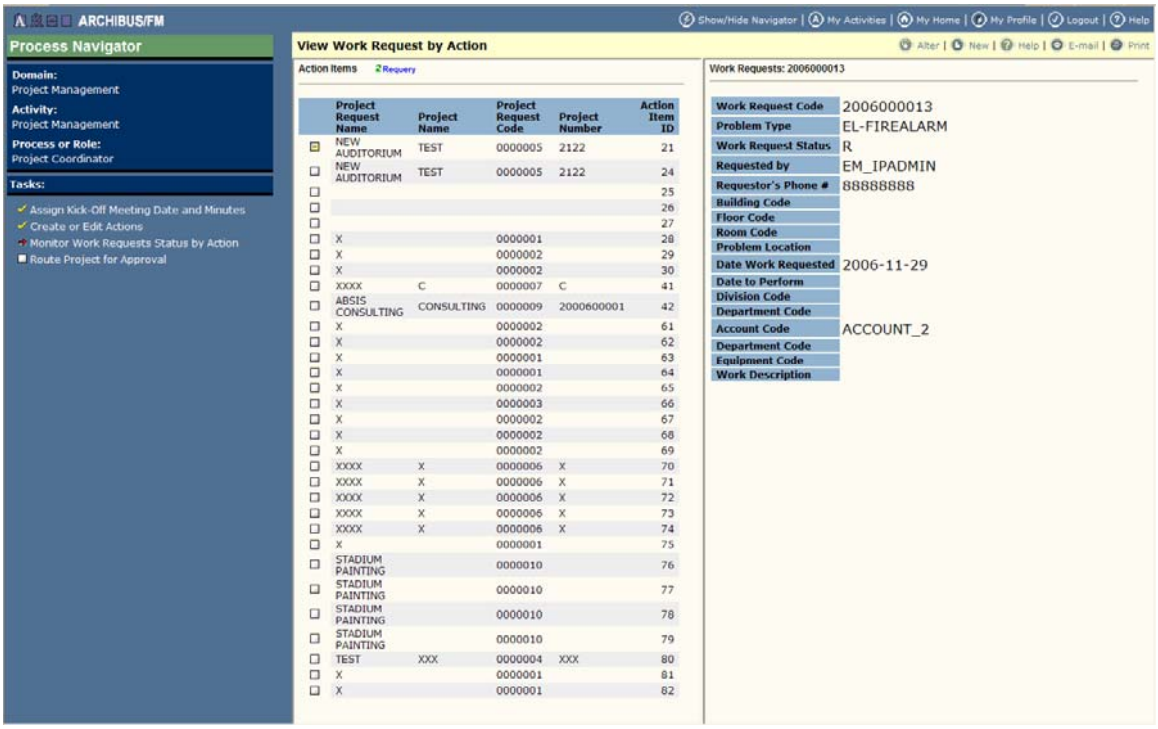
Est. Cost of Materials	The estimated cost of materials.
Est. Cost of Contract	The estimated cost of contract.
Est. Total for Action	The field is automatically updated by the Update Total button.
Save	Saves the changes made to the view.
Add Action	This button adds a blank form so that you can add a new action.
Cancel	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

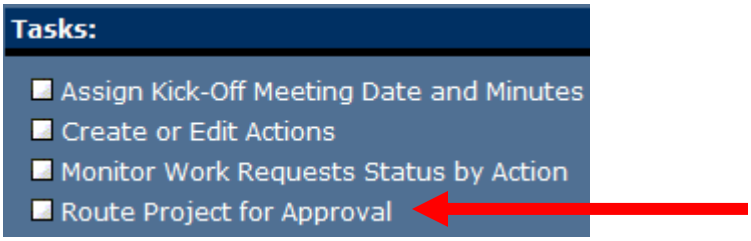


Below is the Monitor Work Request by Action View.

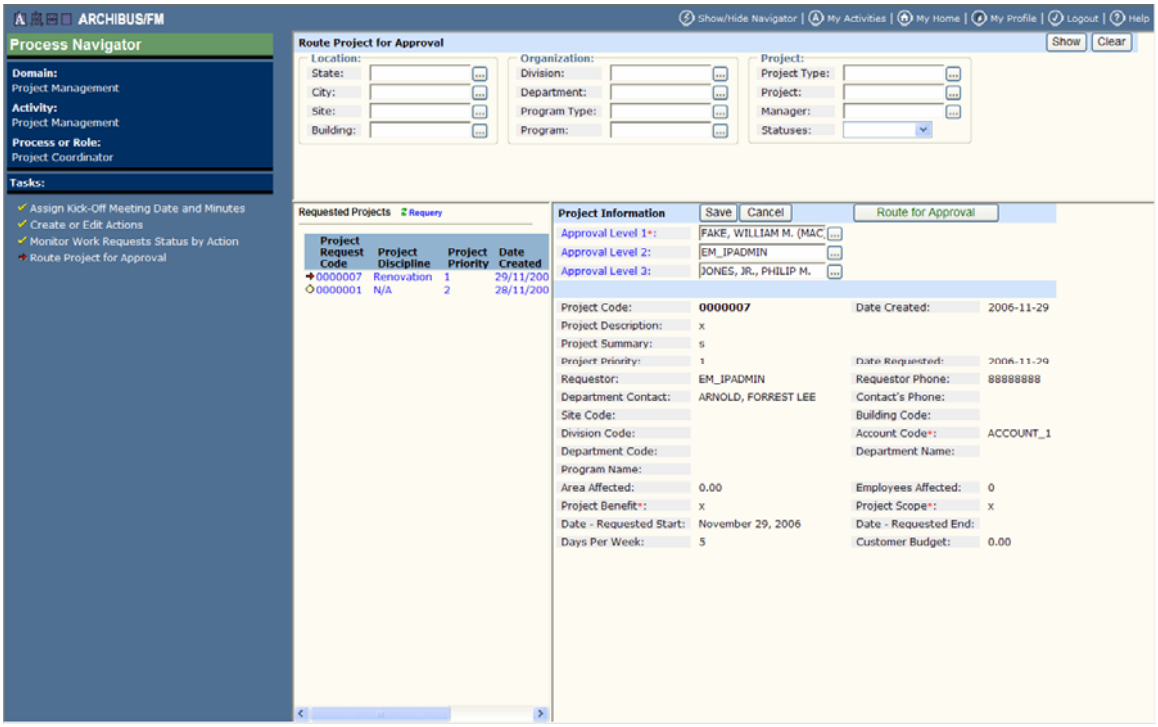


Route Projects for Approval

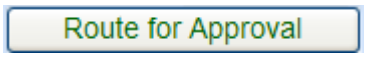
To approve activated projects select, “Approve Project Request” on the Tasks portion of the Process Navigator.



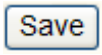
Below is the Approve Project Request View.



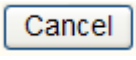
The Project Coordinator will initiate the approval process to the three levels.



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

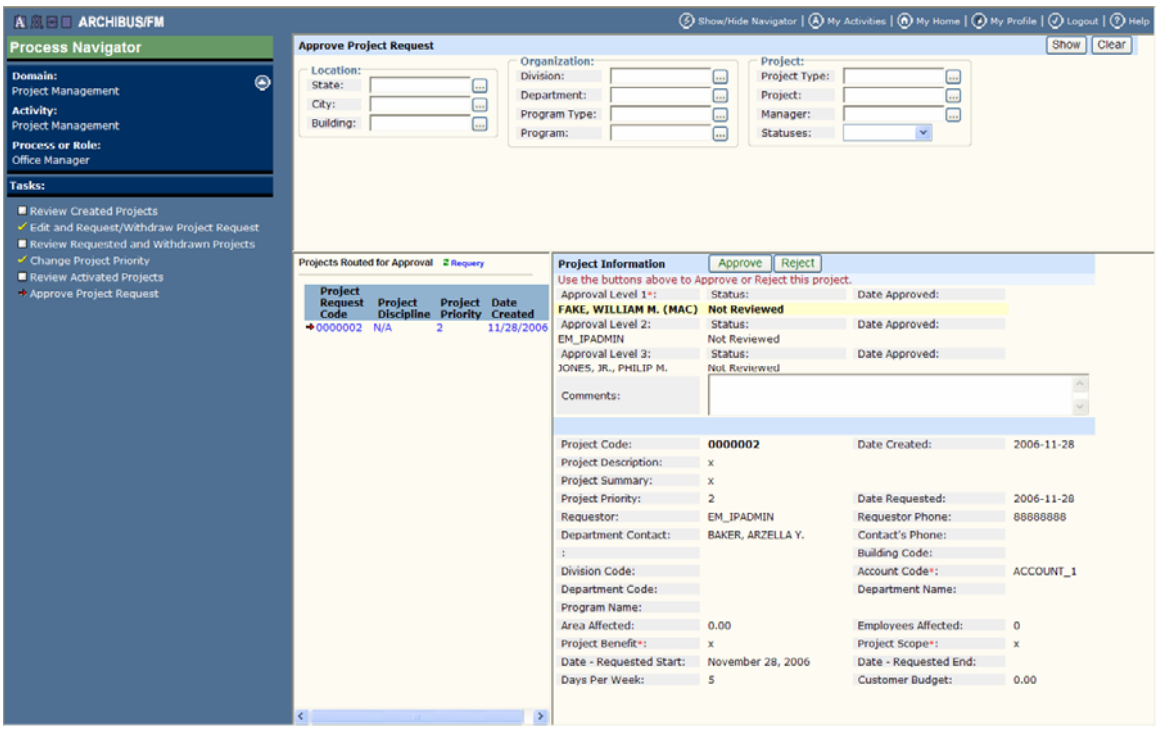
The selections of Project Coordinator Tasks are limited to the following:

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

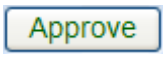
Approve Project Request

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

Below is the Approve Project Request View.



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

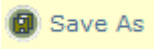


Select this button to approve the project.

Select this button to reject the project.

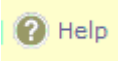
Manipulating Views

Alter will let you define a search

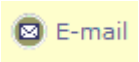


Once you have defined your search you can save the search parameters by using the "Save As" button. This Button only appears after you have a search criteria defined

New will let you define a new Search Criteria

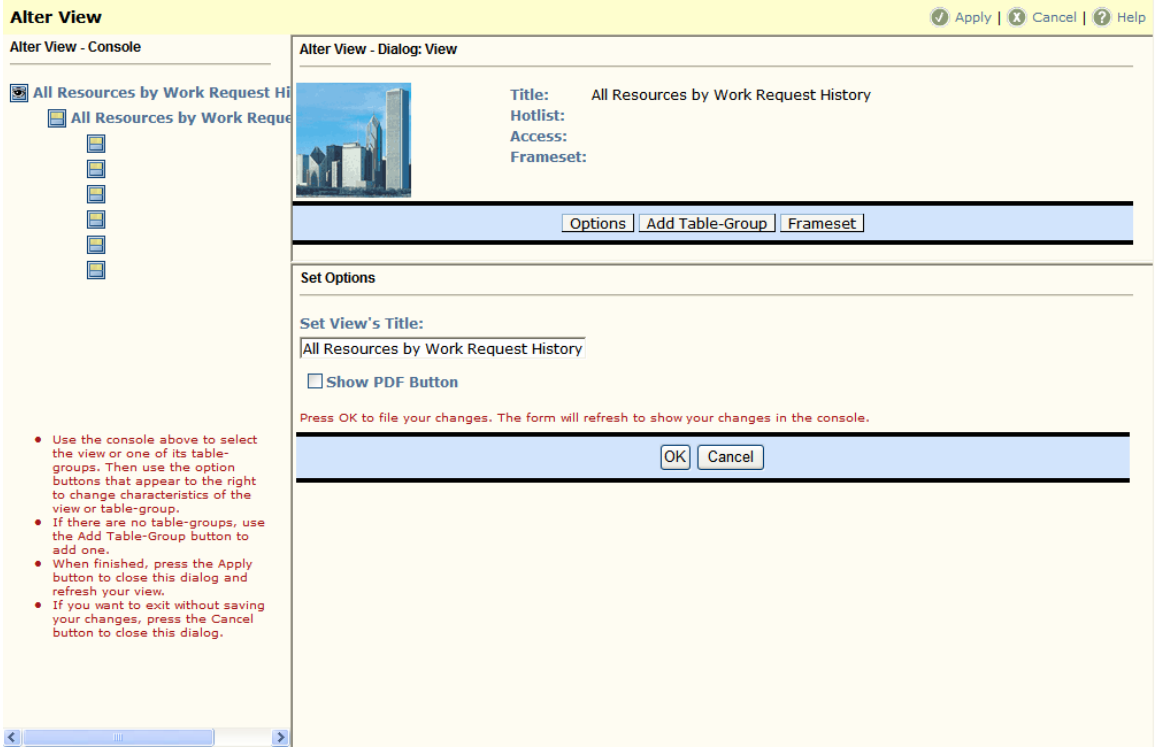


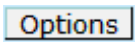
Help will send you to the Help Pages



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

Will print your result to the printer of your choice

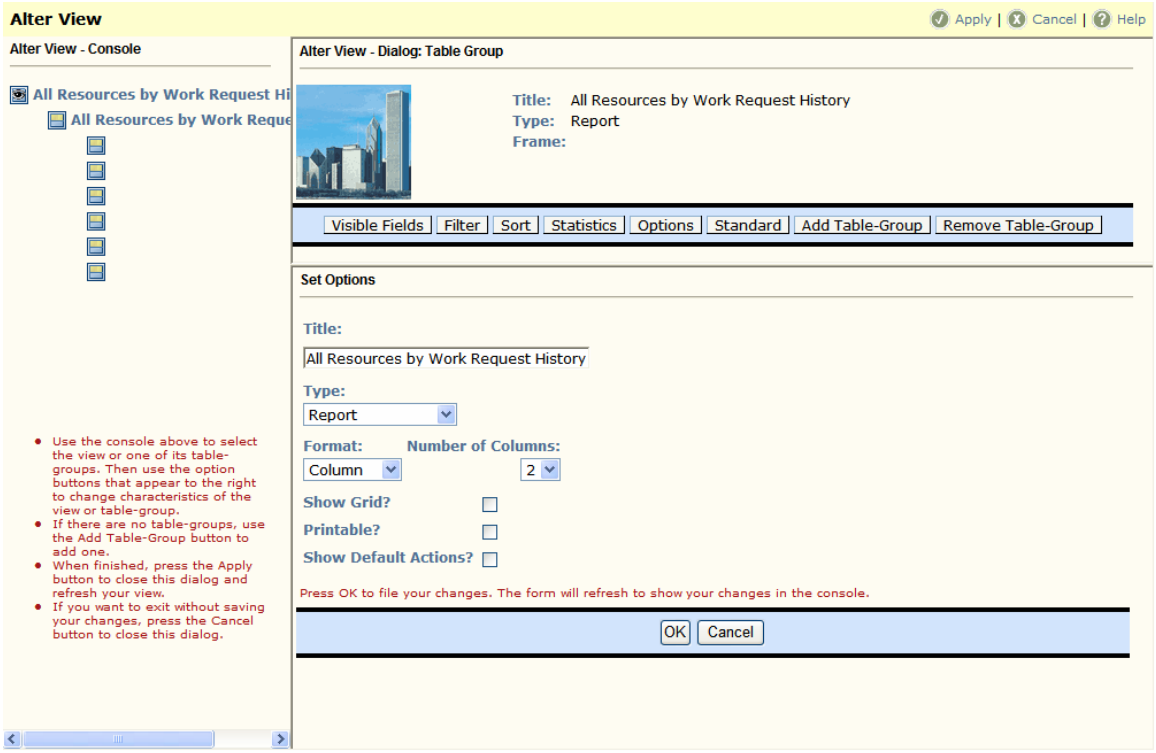




Will take to you the Options View (See Next Page)

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

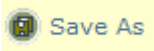
Statistics Will let you set the statistics like total, average, mean … to your view

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