

UNC CHARLOTTE

ARCHIBUS/FM Web Central Beginner Project Management (PAM and FAM) TRAINING


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2012

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Agenda



- Introduction
- ARCHIBUS Informal Projects Defined
 - Process Overview
 - Work Flow Summary
- Project Requests
 - Overview-PAM and FAM Interfaces
 - Role Processes
 - Create Project (PAM)
 - Approve or Reject Projects (FAM & PAM)
 - Add Contacts
 - Edit Funding (FAM)

-----BREAK-----

- Hands On Practice
- Reports
- Questions and Concerns
- New Campus Key Request Process
- Contact Information

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Introduction

- **Training Objective:** To review ARCHIBUS NEW Project Management functionality and processes in relation to PAM and FAM roles through review and hands on training.
- Provide an overview of current processes and the knowledge and skills needed to perform duties and daily responsibilities in relation to the specific role within ARCHIBUS Web Central.

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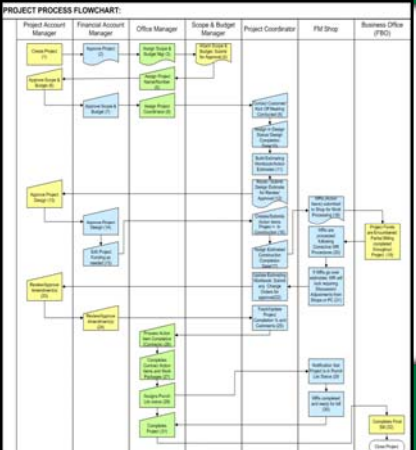
PROJECT MANAGEMENT

Informal projects (less than \$500,000) involve a larger scope than that of a Service Request. Projects often involve more than one trade and sometimes outside contractors and suppliers.



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Project Flow Chart



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Customer Work Flow Summary

| Project Request | Scope and Budget | Design Estimate | CONSTRUCTION |
|------------------------|------------------|-----------------|--------------|
| PAM | PAM | PAM | |
| FAM | FAM | FAM | |
| Design Services | | | |

Process Overview

| Action Item | Role | Menu Item |
|--|-------------|---------------------------|
| 1. Create Project Request | PAM | |
| 2. Approve Project Request | FAM | Approve Project Processes |
| 3. Assign Scope&Budget Mgr | OM | |
| 4. Attach Scope&Budget | SBM | |
| 5. Assign Project Name & Number | OM | |
| 6. Approve Scope&Budget | PAM | Approve Project Processes |
| 7. Approve Scope&Budget | FAM | Approve Project Processes |
| 8. Assign Project Coordinator | OM | |
| 9. Kick Off Meeting | PC | |
| 10. Assign Est. Design Completion Date | PC | |
| 11. Build Estimating Workbook/Create | PC | |
| 12. Design&Estimate | PC | |
| 13. Route Project for Approval | PC/OM | |
| 14. Approve Design & Estimate | PAM | |
| 15. Approve Design & Estimate | FAM | |
| 16. Edit Fund Accounting | FAM | Edit Funding |
| 17. Create Actions/Assign In-Const Status | PC | |
| 18. Assign Est. Construction Completion Date | PC | |
| 19. Action Items Submitted to Shop (WRs) | FO Shops | |
| 20. Encumber Funds/Partial Billing | FBO | |
| 21. Complete WRs According to Procedures | FO Shops | |
| 22. If WR Goes over Est., WR Locks Requiring | FO Shops/PC | |
| 23. Shop/DS Adjustments | PC | |
| 24. Update Workbook/Create Amendment | PAM | Approve Project Processes |
| 25. Approve Amendment | FAM | Approve Project Processes |
| 26. Update Project % / Progress | OM/PC | |
| 27. Process Action Items/Contracts | OM | |
| 28. Completes Contracts/Action Items | OM | |
| 29. Move Project to Punch List Status | OM | |
| 30. Punch List Notification-Completes WRs | FO Shops | |
| 31. Complete Project | OM | |
| 32. Complete Final Bill | FBO | |
| 33. Close Project | FBO | |

Archibus Project Management Customer Roles

Project Management Roles:

- Project Account Manager (PAM)
 - Creates Informal Project Request
 - Approval and Monitors Informal Project
- Financial Account Manager (FAM)
 - Primary vs. Secondary vs. Third vs. Fourth
 - Building Operations vs. Project Management
 - Managing Account Codes (Banner vs. Archibus)

Archibus Project Management Overview

ARCHIBIS PAM & FAM Role Overview

- Consolidated Project Approval View allows approvals of all phases within one view.
- At Project Request phase, when PAM and FAM are the same individual they may assign account codes, auto approve as the FAM and submit the project in Requested status to Design Services.
- FAM has the ability at the initial Project Request approval phase to select an option to bypass the Scope and Budget approval process if the budget is equal or lower than original submitted budget.

NOTE: If PAM/FAM are same then both may skip Scope and Budget phase if checkbox is selected.

Creating a Project Request

PAM (Customer) View: Request Project

Actions:

Save and Next

Cancel

Request Project

Select the **Submit Project** button to submit the project request to the FAM. The Customer also has the option of saving the project for later.

Select the **Document(s)** button to upload a Customer document.

DOCUMENT Upload

The PAM may add a document to the Project by selecting the Documents button on the Edit Projects windowpane.

The Project Document window will display allowing a document to be located and uploaded to the project.

PAM (Customer): Manage My Projects

Actions:
EDIT
Add New Project

Manage Requested Projects view allows editing of current projects and the ability to submit a new project request to the FAM.

When FAM/PAM Are Same Individual

The fund accounts will be required and the option to select a project, the FAM/PAM has the option of submitting the project directly to Design using **Submit Project**.

PAM: Manage Team (Project) Contacts

PAM: Add Project Team Contacts

| Team Member Code | Team Member Role | Project Request Code | Team Member Name |
|-----------------------------|-----------------------------------|----------------------|------------------|
| SHAMPOK, DAVID (dshampk) | Contact Name | 000005 | |
| ORNELLO, RAYMOND (rornello) | Project Account Manager/Alternate | | |
| DUFF, PAMELA (pduff) | Project Account Manager | | |
| DUFF, PAMELA (pduff) | Financial Account Manager | | |

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Approve Project Processes

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FAM Role: Approve / Reject Project Processes

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FAM Approve Project View

The fund accounting must be entered prior to selecting the Approve button.

Use ellipse buttons to view and assign accounting

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Update to Banner Codes (Handout)

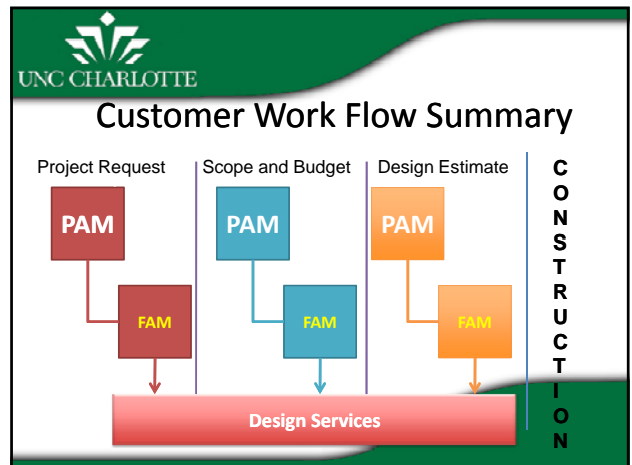
- Laura Demski, Compliance Manager, Comptroller's Office

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Design Services Process

- Assign Scope and Budget Manager
- Attach Scope and Budget
- Assign Project Name and Number

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Scope & Budget Review and Approval

PAM Role: Approve/Reject Scope & Budget Estimate

“Projects” Section

Projects Header

“Project Information” Section

FAM Role: Approve / Reject Scope Budget Estimate

“Projects” Section

Projects Header

“Project Information” Section

Approving Scope & Budget

The FAM will not have to view and approve if they selected to bypass this phase when the S&B Estimate is less than or equal to the Project Dollar Maximum.

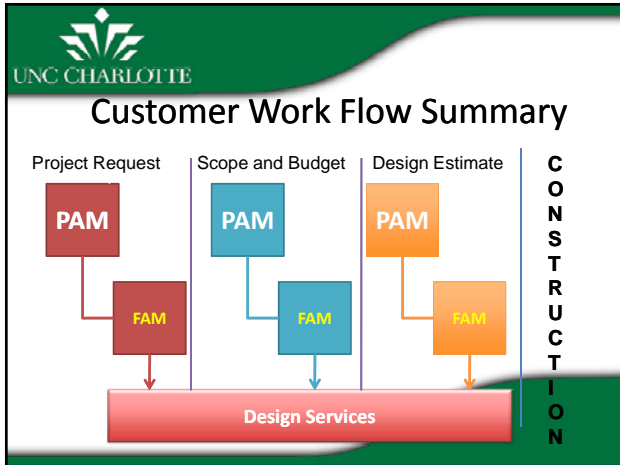
FAM: Approve Project -View Documents

Project Documents may be viewed by selecting the Document(s) button.

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Design Services Process

- Assign Project Coordinator
- Kick Off Meeting
- Assign Estimated Design Completion Date
- Create Work book / Action Items; Generate Design and Estimate
- Route Project for Approval



Review / Approve Design & Estimate

PAM Role: Approve / Reject Design and Estimate

This screenshot shows the PAM interface for approving or rejecting design and estimates. Key sections are highlighted with red boxes:

- "Projects" Section:** Located at the top of the main content area.
- Projects Header:** The header row of the project list table.
- "Project Information" Section:** The detailed information section for a selected project.

The interface includes a sidebar with navigation options and a main table of projects with columns for Control Code, Project Number, Name, and Status.

FAM Role: Approve / Reject Design and Estimate

This screenshot shows the FAM interface for approving or rejecting design and estimates. Key sections are highlighted with red boxes:

- "Projects" Section:** Located at the top of the main content area.
- Projects Header:** The header row of the project list table.
- "Project Information" Section:** The detailed information section for a selected project.

The interface includes a sidebar with navigation options and a main table of projects with columns for Control Code, Project Number, Name, and Status.

Document Review Action: Coversheet

This screenshot shows the document review interface for a coversheet. A red circle highlights the **View Document(s)** button in the top right corner. A red arrow points from this button to a preview window titled **Cover Sheet - New Stuff**, which displays a detailed project summary table.

Approve Project Processes: View Documents

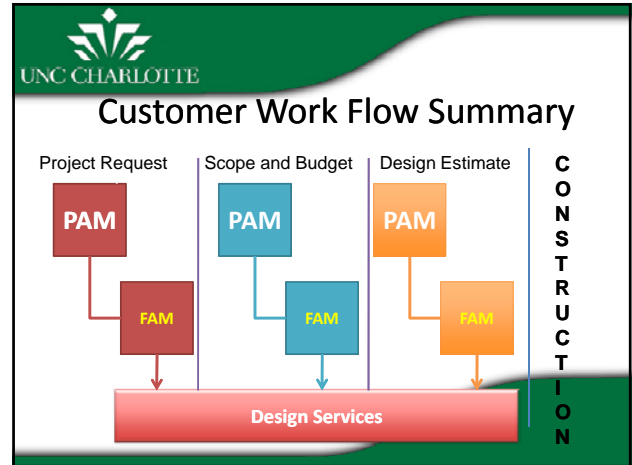
This screenshot shows the interface for viewing project documents. A red arrow points from the **View Document(s)** button to a **Project Documents** window. A text box states: "Project Documents may be viewed by selecting the Document(s) button." A **File Download** dialog box is also visible in the foreground.

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Design Services Process

- Create Work Requests from Design and Estimate
- Assign Estimated Construction Completion Date
- Encumber Funds
- Complete Work Requests
- Create Amendment and Submit for Approval

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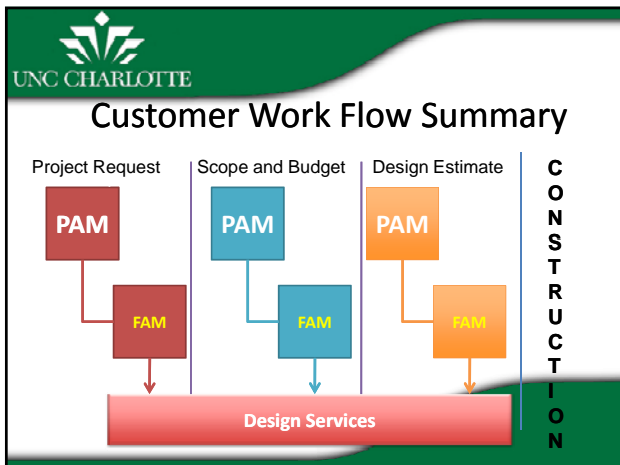
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PAM & FAM Roles: Approve / Reject Amendments

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Design Services Process

- Create Work Requests from Amendment
- Complete Work Requests
- Update Project Progress
- Move Project to Punch List Status
- Complete Project



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HANDS ON PRACTICE

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Hands on Practice


- Using Archibus Development Server
- Reviewing new views of PAM and FAM
 - Create Request Project
 - Manage Requested Projects
 - Approve Project Processes (Scope & Budget, Amendments, Design and Estimate)

UNC CHARLOTTE **Hands-On Training**

Development Server:
<http://fm451:8080/archibus/login.axvw>

Select the ARCHIBUS training link:
[ARCHIBUS Training Link](#)

Sign In using NinerNet username and password



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REPORTS

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- Archibus contains many reports that are very useful when trying to keep track of a project
- Some reports that we will cover:
 - My Projects
 - Project Priority List
- New reports:
 - Customer/FAM Project List
 - Coversheet (PDF)

UNC CHARLOTTE **My Projects**

Review details on all projects

| Control Code | Project Request Name | Project Number | Project Name | Project Work |
|--------------|--------------------------------|----------------|----------------------|------------------|
| BA-083 | FIS Renovation -2 | | | Requested |
| BA-083 | FIS Renovation-2 | | | Created |
| BA-083 | SAS Analyst Office Renovation | | | Created |
| BA-083 | FIS Director Office Renovation | 11-5558 | FIS CID OFFICE | Route for Design |
| BA-085 | YOU R KIDDING, RIGHT | 11-1390 | YOU R KIDDING, RIGHT | Approved Scope |
| BA-085 | install fence | 11-0001 | FENCE INSTALLATION | Approved Scope |
| BA-047 | Test Project Description | 7045511212 | HELLO | Approved Scope |
| BA-044 | Test Proj project | 11-0008 | TRAINING PROJECT | Construction |
| BA-042 | NEW | | | Construction |
| BA-042 | NEW | | | Construction |
| BA-032 | BA-032 | | | |
| BA-012 | FIS 18 | | | |
| BA-011 | FIS 18 | | | |
| BA-006 | 0935 | | | |
| BA-004 | 0935 | | | |
| BA-003 | 0935 | | | |

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| Design Services Project Priority List | Control Code | Project Status Block | Department Code | Sub-Department Name | Building Code | Building Name | Project De |
|---------------------------------------|--------------|---------------------------------|-----------------|-------------------------------|---------------|----------------------|--------------|
| 1 | AA-048 | On Construction | 15100 | Academic Affairs VC | 0018 | Brooker | 08-0084 88 |
| 6 | AA-152 | Project On Hold Design Services | 19400 | College of Business | 0035 | Friday | Add wall to |
| 8 | AA-188 | Project On Hold Design Services | 26400 | Urban Institute | 0022 | Colvard | The Urban |
| 6 | AA-041 | Project On Hold Design Services | 20000 | Library | 0004 | Alford | Alford Libra |
| 8 | AA-182 | Project On Hold Design Services | 20000 | Library | | | Relocate 86 |
| 8 | AA-189 | Project On Hold Design Services | 19400 | College of Business | 0035 | Friday | Relocate 86 |
| 0 | AA-189 | Requested | 21300 | College of Engineering | 0057 | Brooker | Howe and a |
| 1 | AA-203 | On Construction | 15100 | Academic Affairs VC | 0018 | Brooker | 08-0181 88 |
| 6 | AA-219 | Project On Hold Design Services | 22300 | College of Health & Human Svc | 0017 | Beth Gymnasium | Renovation |
| 0 | AA-214 | Requested | 21300 | College of Engineering | 0057 | Duke Centennial hall | Install 86 a |
| 6 | AA-213 | Project On Hold Design Services | 19400 | College of Business | 0035 | Friday | Remove 2.4 |
| 0 | AA-218 | Requested | 19400 | College of Business | 0035 | Friday | Install new |
| 8 | AA-217 | Project On Hold Design Services | 19400 | College of Business | 0035 | Friday | Install new |
| 0 | AA-218 | Requested | 19400 | College of Business | 0035 | Friday | Install new |
| 6 | AA-219 | Project On Hold Design Services | 19400 | College of Business | 0035 | Friday | Install new |
| 0 | AA-221 | Requested | 19400 | College of Business | 0035 | Friday | Install a pr |
| 0 | AA-222 | Requested | 19400 | College of Business | 0035 | Friday | Create a pr |
| 8 | AA-216 | Project On Hold Design Services | 15200 | School of Architecture | 0051 | Robinson hall | A new Dep |
| 0 | AA-225 | Requested | 15200 | School of Architecture | 0043 | Starns | Starns Scaf |
| 8 | AA-216 | Project On Hold Design Services | 15200 | School of Architecture | 0051 | Robinson hall | Renovation |
| 8 | AA-217 | Project On Hold Design Services | 15200 | School of Architecture | 0043 | Starns | Starns Scaf |
| 8 | AA-218 | Project On Hold Design Services | 15200 | School of Architecture | 0051 | Robinson hall | New Doo |

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The Project Priority List: Assignments

- All Projects receive a priority assignment after they are created by the customer
 - 0 – Customer initiated request
 - 5 – Scope & Budget has been sent to the customer
 - 4 – Scope & Budget has been approved by the customer
 - 3 – Future priority classification
 - 2 – Summer project
 - 1 – End of the Year project

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FAM Role: Edit Funding

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FAM: Edit Funding

FAMs may edit Account Codes on projects up until "In Construction" status; when new funds are added, the fund may be indicated as the new Primary Fund by select the drop down box" to indicate "Yes"

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HANDS ON PRACTICE

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Hands on Practice

- Using Archibus Development Server
- Reviewing new views of PAM and FAM
 - Manage Team Contacts
 - Edit Funding (FAM)

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Hands-On Training

- <http://fm451:8080/archibus/login.axvww>

Select the ARCHIBUS training link:
[ARCHIBUS Training Link](#)

Sign In using NinerNet username and password

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How do I Add/Update a FAM within My Department?

On the Facilities Management Archibus Home page:
<http://facilities.uncc.edu/information-systems/archibus/archibus>

Fill out a FAM access form and send it to Noella Paquette (FBO)

Remember to select which FAM role you would like (Primary, 4th etc.) and fill out as many fields as possible

FINANCIAL ACCOUNT MANAGER (FAM) DOCUMENTATION

Notes from Facilities Business Office (FBO)


- All Faculty and Staff have Archibus Access but for a FAM account please fill out a FAM Access Form.
- Questions about the Financial Account Manager (FAM) Access Form please contact Rob Herrington at 704-687-2696
- Please send FAM Access Form via Campus Mail attention Noella Paquette to Facilities Management - FBO
- FAM Access Form available: PDF Form must have at least Archive 8.0 or use Excel 2003 email for those that have the older adobe version).
- While filling out the FAM Access Form, please remember to check-off which role you are requesting (i.e. Primary FAM, Third FAM) before you submit the form so that FBO will be able to list your role correctly in the FAM list.

I submitted a project; however, now I do not see my submitted project. Where is it?

If the PAM (Customer) has submitted a project but it does not show on the Project Priority List, then confirm that the FAM has approved the project.

NEW ARCHIBUS PROCESS: Campus Key Request Process

Discontinuation of Paper format - Jan 2013



Key Request Info

Go to Facilities Management homepage:
<http://facilities.uncc.edu>

Select Key Requests located under the Home listing

Key Shop Information

Key Request Pick Up Times:

Monday thru Friday
 8:00 am - 12:00 pm & 12:30 pm - 2:30 pm

Lock Shop Location: Cone 175



Website:
<http://facilities.uncc.edu/home/key-request-forms/lockshop-information>

Contacts:

| | | |
|----------------|--|--------------|
| Rob Herrington | rgherrin@uncc.edu | 704-687-0588 |
| Andy Lavoie | amlavoie@uncc.edu | 704-687-0589 |

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Questions or Concerns



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Facility Information Systems

Points of Contact:

- Pamela Duff pduff@uncc.edu 704-687-0552
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- Fred Brillante jbrilla@uncc.edu 704-687-0530
- Curtis Gatt cgatt@uncc.edu 704-687-0530