



**Training Outline  
ARCHIBUS/FM Web Central  
For the Financial Account Manager Role**





# Agenda

- Informal Projects – Mac Fake** (5)
- Work Orders – Larry Howell** (5)
- FIS Support – Ray Dinello** (5)
- Training – Kevin Zimmer**
  - Concepts**
    - Roles** (5)
    - Interface** (5)
  - Work Requests**
    - Process** (10)
    - Hands on Practice** (20)
  - Break** (15)
  - Project Requests**
    - Process** (30)
    - Hands on Practice** (50)



### ■ Building Operations Management Roles:

Customer

Building Liaison

Department

Financial Account Manager (FAM)

### ■ Project Management Roles:

Project Account Manager (PAM)

Financial Account Manager (FAM)



### ■ Financial Account Manager

- Primary vs. Secondary
- Building Operations vs. Project Management
- Managing Account Codes (Banner vs. Archibus)



# Starting and Logging in

(4)

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Aremis

- Address: <http://fmbld07.uncc.edu:8080/archibus>

ARCHIBUS

Project: UNCC DEVELOPMENT

**Service Requests:**

There are two types of Work Requests: (1) Requests for basic maintenance of the facility to keep operational and safe and (2) billable work that is under \$2500.00 and generally involves only one trade. Examples include: after hours housekeeping, shelving construction, hanging items on walls, simple painting, chair and desk repairs, assistance with activities on weekends and evenings.

[Service Request Tutorial](#)

**Project Requests:**

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

[Project Request Tutorial](#)

**Sign In**  
Sign in to your personalized list of activities and join the collaboration now.

Enter your user name:

Enter your password:

Forget your password? [Click here.](#)

Remember my user name on this computer

[Sign In](#)



# Basic Navigation

(5)

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## ■ Menus

ARCHIBUS

Hide Navigator

My Activities

My Home

My Profile

Logout

Help

The screenshot shows the ARCHIBUS web application interface. The top navigation bar includes links for Hide Navigator, My Activities, My Home, My Profile, Logout, and Help. The left sidebar contains a menu with the ARCHIBUS logo and buttons for Hide Navigator, My Activities, My Home, My Profile, Logout, and Help. The main content area displays the ARCHIBUS logo and a list of tasks. Red arrows point from the 'Current Activity', 'Current Role', and 'Task List' labels to the corresponding elements in the interface.

ARCHIBUS

Building Operations Management

Customer

Tasks :

Processes:

- Create Work Request
- Review Work Request (waiting Approval)
- Review All Active Work Requests
- Work Request Satisfaction Results
- Review Historical Work Request and Resources

Reports:

Current Activity

Current Role

Task List



## **SERVICE REQUESTS**





# Work Requests

■ There are two types of Work Requests:

(1) Requests for basic maintenance of the facility to keep operational and safe.

(2) Billable work that is under \$2500.00 and generally involves only one trade.

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



## Process Overview

(6)

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<b>Action Item</b>		<b>Menu Item</b>
1	Create Service Request.	Create Work Request
2	Request is routed to the appropriate Facility Management Shop Supervisor.	
3	Shop Supervisor will determine whether the service request is reimbursable or not.	
4	Non-Reimbursable requests are issued and proceed along the current corrective maintenance work flow.	
5	Reimbursable requests are routed to the Financial Account Manager for that Department.	
6	Financial Account Manager applies accounting codes and Approves or Rejects service request.	Approve Work Request
7	Request is routed back to the appropriate Facility Management Shop Supervisor.	
8	Request is then issued and proceeds along the current corrective maintenance work flow.	
9	Financial Account Manager can edit the accounting codes on reimbursable until the service request is complete and billed.	Edit Account Codes on Work Request



# Create Work Request

(8)

## Tasks :

### Processes:

- ➔ Create Work Request
- Approve Work Request
- Edit Account Codes on Work Request

### Reports:

- Review Work Request Awaiting Approval
- Review All Active Work Requests
- View Billed Work Requests

## Problem Type



Type of problem

ARCHIBUS Hide Navigator | My Activities | My Home | My Profile | Logout | Help

Building Operations Management | Financial Account Manager

### Create Work Request

Create Request | Review

Create Work Request

Please enter or select a value for the following fields. You MUST enter a value for Requested By, Phone Number, Problem Type and either Equipment or Building.

Requested for:	<input type="text"/>
Requested by*:	DINELLO, RAYMOND - 800
Requestor's Phone #**:	7046874680
Problem Type*:	<input type="text"/>
Division Code*:	1240
Equipment Code:	<input type="text"/>
Building Code*:	0055
Floor Code:	02
Room Code:	237
Department Code*:	13900
Problem Location:	<input type="text"/>

Urgency:  Critical  Routine  No Urgency

Work Description:

Requested Completion Date:  Requested Completion Time:



## M&O Tasks

- Routed to Shop Supervisor
- Supervisor determines whether the service request is reimbursable or not.
- Request routed to FAM queue to review accounting information.



# Approve Work Request

(11)

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## Tasks :

### Processes:

- Create Work Request
- Approve Work Request
- Edit Account Codes on Work Request

### Reports:

- Review Work Request Awaiting Approval
- Review All Active Work Requests
- View Billed Work Requests

## Filtering Actions:

Search Now

Show All

## Request Actions:

Approve

Reject

Cancel

The screenshot displays the ARCHIBUS web application interface. The top navigation bar includes 'ARCHIBUS', 'Hide Navigator', 'My Activities', 'My Home', 'My Profile', 'Logout', and 'Help'. The main content area is divided into two sections:

- Search Work Requests:** This section contains a search form with fields for 'From Work Request Code', 'To Work Request Code', 'Index/Fund Account', 'Department Code', 'Requested by', 'Requested for', 'Equipment Code', 'Building Code', 'Problem Type', 'Work Urgency' (set to 'No Urgency'), 'Shop/Zone Code', 'Requested' (set to 'Date Range'), 'Requested Date From', and 'Requested Date To'. A red arrow points from a text box labeled "Search Work Requests" section to this search form.
- Work Requests:** This section displays a table of work requests. A red arrow points from a text box labeled "Work Requests" section to the table. The table has columns for 'Work Request Code', 'Problem Type', and 'Work Request Status'. The first row shows: 2006016542 | EL-IN-LIGHT | Submitted.
- Edit Work Request Details:** This section shows the details for the selected work request (2006016542). It includes fields for 'Work Request Code', 'Problem Type', 'Requested for', 'Requested by', 'Requestor's Phone #', 'Building Code', 'Floor Code', 'Room Code', 'Problem Location', 'Requested Completion Date', 'Requested Completion Time', 'Banner Account Code', 'Index/Fund Account', 'Description', and 'Rejection Reason'. A red arrow points from a text box labeled "Edit Work Request Details" section to this details view.





## M&O Tasks

- Work is executed
- Time, Materials and other charges are assigned to the work request.
- Work is closed out
- FBO performs the billing





## PROJECT REQUESTS





## PROJECT MANAGEMENT

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



# Process Overview

(24)



	<b>Action Item</b>	<b>Role</b>	<b>Menu Item</b>
1	Create Project Request	PAM	Create Project Request
2	Approve Project Request	FAM	Approve or Reject Project Request
3	Assign Scope and Budget Manager	OM	
4	Attach Scope and Budget	SBM	
5	Assign Project Name and Number	OM	
6	Approve Scope and Budget	PAM	Approve or Reject Scope and Budget Estimate
7	Approve Scope and Budget	FAM	Approve or Reject Scope and Budget Estimate
8	Assign Project Coordinator	OM	
9	Kick Off Meeting	PC	
10	Change Project Priority	PC	
11	Assign Estimated Design Completion Date	PC	
12	Create Design and Estimate	PC	
13	Route Project for Approval	OM	
14	Approve Design and Estimate	PAM	Approve or Reject Design and Estimate
15	Approve Design and Estimate	FAM	Approve or Reject Design and Estimate
16	Allocate Funding	FAM	
17	Finish Design and Estimate	PC	
18	Approve Design and Estimate	AVC	
19	Create Work Requests from Design and Estimate	PC	
20	Assign Estimated Construction Completion Date	PC	
21	Encumber Funds	FBO	
22	Complete Work Requests	M&O	
23	Create Amendment	PC	
24	Approve Amendment	PAM	Approve or Reject Amendments
25	Approve Amendment	FAM	Approve or Reject Amendments
26	Allocate Funding	FAM	Edit Funding
27	Create Work Requests from Amendment	OM	
28	Complete Work Requests	M&O	
29	Update Project Progress	PC	
30	Move Project to Punch List Status	OM	
31	Complete Project	OM	



# Create Project Request 1/3

(26)

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Aremis

## Tasks :

### Process:

- ➔ Create Project Request
- Edit Project Request
- Approve or Reject Scope Budget Estimate
- Approve or Reject Design and Estimate
- Approve or Reject Amendments

### Reports:

- Project History
- Project Priority List

## ■ Actions:

Save and Next

ARCHIBUS

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

Project Management

Customer

Tasks :

Process:

- ➔ Create Project Request
- Edit Project Request
- Approve or Reject Scope Budget Estimate
- Approve or Reject Design and Estimate
- Approve or Reject Amendments

Reports:

- Project History
- Project Priority List

Request Project - 1 | Request Project - 2 | Review Request | Edit Request

Enter Project Information

Project Account Manager\*: DINELLO, RAYMOND - 80C ...

Department Code\*: 13900 ...

Date Created\*: 10/24/2007 ...  
December 11, 2006

Project Request Name\*: [ ]

Project Summary\*: [ ]

The customer's account will be charged a 3% Administrative Fee for all Informal Projects based on the total final Project Construction Cost.

(1) If the Project is formally cancelled by the customer prior to the start of design, the Administrative Fee shall be \$300 (Project Initiation Fee).

(2) If the Project is cancelled after the start of design but prior to the start of construction, the 3% Administrative Fee shall be based on Design Services' Construction Estimate.

For additional information see the Informal Projects Process Tutorial.

Save and Next

The lighter blue tab is the active tab.

Local Intranet | 100%



# Create Project Request 2/3

ARCHIBUS Hide Navigator | My Activities | My Home | My Profile | Logout | Help

Project Management Create Project Request

Customer Request Project - 1 | Request Project - 2 | Review Request | Edit Request | Save

Tasks :

Process:

- Create Project Request
- Edit Project Request
- Approve or Reject Scope Budget Estimate
- Approve or Reject Design and Estimate
- Approve or Reject Amendments

Reports:

- Project History
- Project Priority List

Enter Project Information

Project Request Code\*: 0000138

Project Account Manager: DINELLO, RAYMOND - 800202255

Department Code: 13900

Division Code: 1240

Date Created\*: 10/24/2007  
October 24, 2007

Project Request Name: Project Request Name

Project Summary: Summary of Project Request.

Building Code\*:

Index/Fund Account\*:

Banner Account Code\*:

Financial Account Manager\*: DINELLO, RAYMOND - 800202255

Additional Information:

Special Information:

Project Benefit:

Project Dollar Maximum:

Done Local intranet 100%

## Actions:

Primary

Secondary

Save



# Create Project Request 3/3

## ■ Actions:

Edit

ARCHIBUS Hide Navigator | My Activities | My Home | My Profile | Logout | Help

Project Management Create Project Request

Customer

Tasks:

Process:

- ➔ Create Project Request
- Edit Project Request
- Approve or Reject Scope Budget Estimate
- Approve or Reject Design and Estimate
- Approve or Reject Amendments

Reports:

- Project History
- Project Priority List

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**Create Project Request**

Request Project - 1 | Request Project - 2 | Review Request | Edit Request

Project Information Edit

Project Request Code	Project Request Name	Project Status Block
0000139	Project Request	Submitted

Control Code: FM-335

Project Account Manager: DINELLO, RAYMOND - 800202255

Department Code: 13900

Division Code: 1240

Date Created\*: 10/24/2007

October 24, 2007

Project Summary:

Index/Fund Account: 118100

Banner Account Code: 928350

Financial Account Manager: DINELLO, RAYMOND - 800202255

Additional Information:

Special Information:

Project Benefit:

Project Dollar Maximum: 10,000.00

Done Local intranet 100%



# Edit Project Request

(32)

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## Tasks :

### Process:

- ✓ Create Project Request
- ➔ Edit Project Request
- Approve or Reject Scope Budget Estimate
- Approve or Reject Design and Estimate
- Approve or Reject Amendments

### Reports:

- Project History
- Project Priority List

## ■ Actions:

Re-Submit

Delete

Cancel

http://localhost:8888/archibus/z-cust-edit-project-form.aspxv - Windows Internet Explorer

Project Information		Re-Submit	Delete	Cancel
Project Request Code ▲	Project Request Name ▾	Project Status Block ▾		
0000139	Project Request	Submitted		
Control Code: FM-335				
Project Account Manager*:		DINELLO, RAYMOND - 80C ...		
Financial Account Manager*:		DINELLO, RAYMOND - 80C ...		
		Primary	Secondary	
Date Created*:		10/24/2007 October 24, 2007		
Project Request Name*:		Project Request		
Department Code*:		13900 ...		
Division Code*:		1240 ...		
Index/Fund Account*:		118100 ...		
Banner Account Code*:		928350 ...		
Project Summary:		Project Summary		
Additional Information:				
Special Information:				
Project Benefit:				
Project Dollar Maximum:		10,000.00		

Done Local intranet 100%



# Approve/Reject Project Request (46)

AOS  
Aramis

## Tasks :

### Process:

- ➔ Approve or Reject Project Request
- Approve or Reject Scope Budget Estimate
- Edit Funding
- Approve or Reject Design and Estimate
- Approve or Reject Amendments

### Reports:

- Project History
- Project Priority List

## Actions:

Approve

Reject

Cancel

ARCHIBUS

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

Project Management

Financial Account Manager

Tasks :

Process:

- ➔ Approve or Reject Project Request
- Approve or Reject Scope Budget Estimate
- Edit Funding
- Approve or Reject Design and Estimate
- Approve or Reject Amendments

Reports:

- Project History
- Project Priority List

Project Request Code	Control Code	Project Request Name	Project Status Block	Date Created
0000139	FM-335	Project Request	Submitted	10/24/2007

Approve/Reject Projects

Project Request Code: 0000139 | Project Request Name: Project Request | Project Status Block: Submitted

Project Header

Project Information

Control Code: FM-335

Project Account Manager: DINELLO, RAYMOND - 800202255

Financial Account Manager: DINELLO, RAYMOND - 800202255

Date Created: 10/24/2007

Project Request Name: Project Request

Project Summary: Project Summary

Project Dollar Maximum: 10,000.00

Department Code: 13900

Division Code: 1240

Index/Fund Account: 118100

Banner Account Code: 928350

Additional Information:

Special Information:

Project Benefit:

Reason for Rejection:

“Projects” section.

“Project Information” section



# Design Services Process

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



# Approve / Reject Scope Budget Estimate (48)

AOS  
Aramis

## Tasks :

### Process:

- Approve or Reject Project Request
- Approve or Reject Scope Budget Estimate
- Edit Funding
- Approve or Reject Design and Estimate
- Approve or Reject Amendments

### Reports:

- Project History
- Project Priority List

## Actions:

### Document(s)

Approve

Reject

Cancel

The screenshot displays the ARCHIBUS web application interface. The main content area is titled "Approve Scope and Budget for Projects". On the left, there is a navigation menu with "Project Management" and "Customer" options. Below this, there are sections for "Tasks" and "Reports". The "Tasks" section includes a list of actions, with "Approve or Reject Scope Budget Estimate" selected. The "Reports" section includes "Project History" and "Project Priority List".

The main content area is divided into two sections. The top section is a table titled "Projects" with columns for "Project Number", "Control Code", "Project Name", and "Project Stat". The table contains one row with the following data: Project Number: 07-0000, Control Code: FM-335, Project Name: PROJECT REQUEST, Project Stat: Scope & Bud. A red box labeled "Projects" section points to this table.

The bottom section is a form titled "Project information" with fields for "Project Name\*", "Project Number", "Control Code", "Project Dollar Maximum", "Project Budget", "Index/Fund Account", "Banner Account Code", "Project Account Manager", "Financial Account Manager", "Scope Budget Manager", "Date Created\*\*", "Project Priority", "Project Summary", "Department Code", "Division Code", "Additional Information", "Special Information", "Project Benefit", and "Reason for Rejection". A red box labeled "Project Header" points to the top of this form, and another red box labeled "'Project Information' section" points to the entire form area.

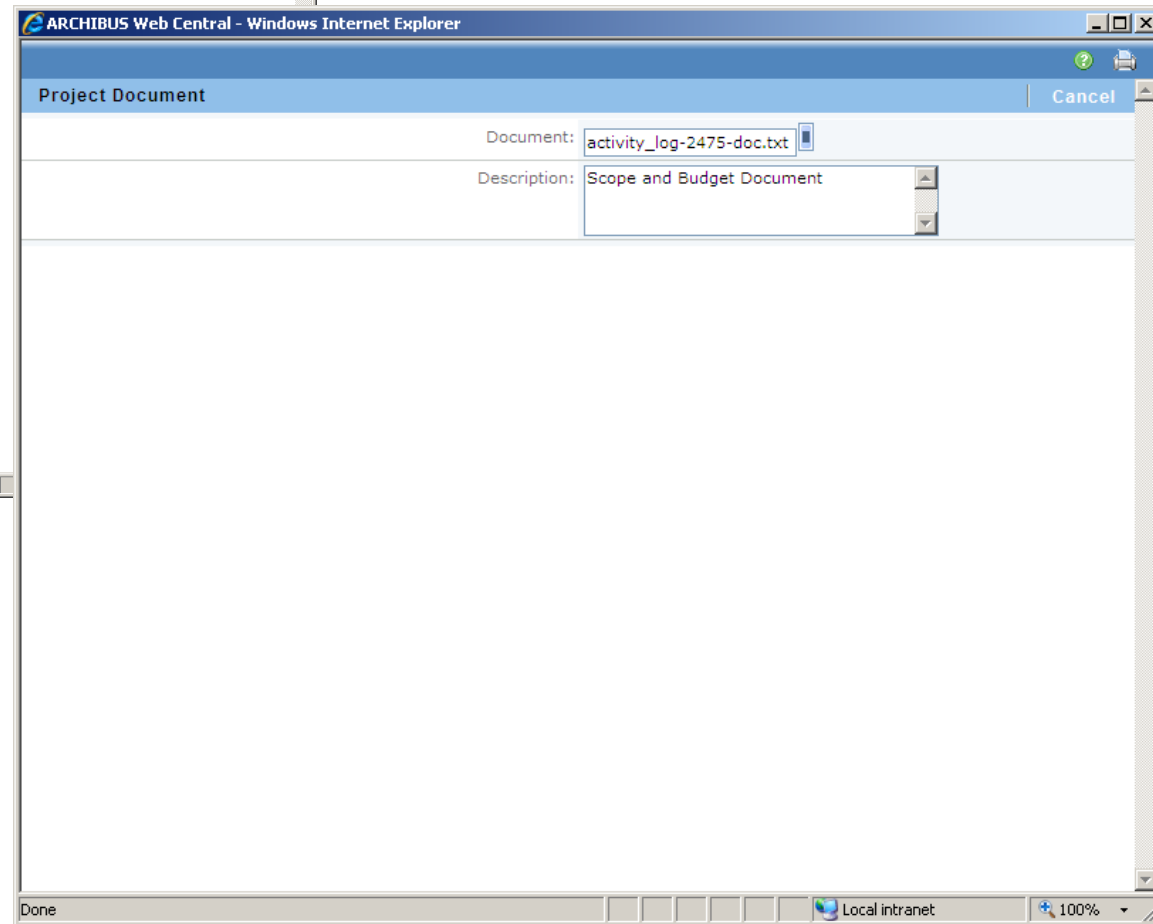
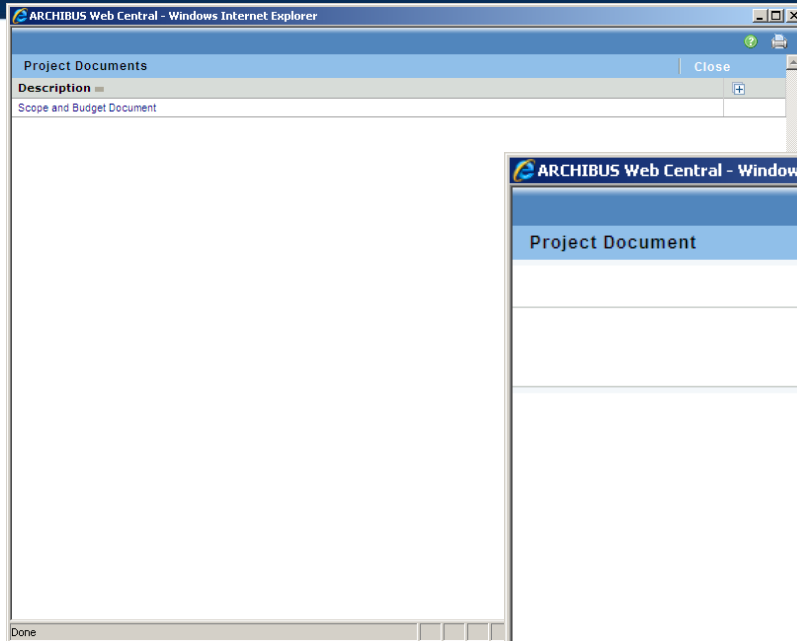
Red arrows point from the "Projects" section box to the table, from the "Project Header" box to the top of the form, and from the "'Project Information' section" box to the form area.



# DOCUMENT Action

(61)

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# Design Services Process

- **Assign Project Coordinator**
- **Kick Off Meeting**
- **Change Project Priority**
- **Assign Estimated Design Completion Date**
- **Create Design and Estimate**
- **Route Project for Approval**



# Edit Funding

(50)

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Aremis

## Tasks :

### Process:

- Approve or Reject Project Request
- Approve or Reject Scope Budget Estimate
- Edit Funding
- Approve or Reject Design and Estimate
- Approve or Reject Amendments

### Reports:

- Project History
- Project Priority List

## Funds Actions:

Edit

Add New

## Edit Actions:

Save

Delete

Cancel

The screenshot shows the ARCHIBUS software interface. The top navigation bar includes 'Hide Navigator', 'My Activities', 'My Home', 'My Profile', 'Logout', and 'Help'. The main content area is titled 'Allocate Funding' and contains three sections:

- Projects section:** A table with columns: Project Number, Control Code, Project Name, Project Status Block, and Date Created. A red arrow points from a text box labeled "Projects" section to this table.
- Add/Edit Project Funding section:** A form with fields for Project Number (07-0000), Index/Fund Account (118100), Banner Account Code (928350), Funded Amount (Sub-Total) (15,371.79), Funded Amount (Total) (15,371.79), and Description (PROJECT SUMMARY). A red arrow points from a text box labeled "Add/Edit Project Funding" section to this form.
- Project Funds section:** A table with columns: Index/Fund Account, Banner Account Code, Funded Amount (Sub-Total), and Funded Amount (Total). A red arrow points from a text box labeled "Project Funds" section to this table.

Project Number	Control Code	Project Name	Project Status Block	Date Created
07-0000	FM-335	PROJECT REQUEST	FM Scheduling	10/24

Index/Fund Account	Banner Account Code	Funded Amount (Sub-Total)	Funded Amount (Total)
118100	928350	15,371.79	15,371.79



# Approve or Reject Design and Estimate (53)

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Aremis

## Tasks :

### Process:

- Create Project Request
- Edit Project Request
- Approve or Reject Scope Budget Estimate
- Approve or Reject Design and Estimate
- Approve or Reject Amendments

### Reports:

- Project History
- Project Priority List

## ■ Actions:

Document(s)

Review

Approve

Reject

Cancel

ARCHIBUS

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

Project Management

Financial Account Manager

### Approve Projects Design and Estimates

Project Number	Project Name	Project Status Block
07-0000	PROJECT REQUEST	Approved Design & Estimate

Tasks :

Process:

- Approve or Reject Project Request
- Approve or Reject Scope Budget Estimate
- Edit Funding
- Approve or Reject Design and Estimate
- Approve or Reject Amendments

Reports:

- Project History
- Project Priority List

Project Information | Document(s) | Review | Approve | Reject | Cancel

Control Code: FM-335

Project Name\*: PROJECT REQUEST

Project Summary: Template

Project Dollar Maximum: 10,000.00

Project Budget: 12,500.00

Project Estimate: 14,687.47

Project Account Manager: DINELLO, RAYMOND - 800202255

Financial Account Manager: DINELLO, RAYMOND - 800202255

Scope Budget Manager: ELSTON, MARISA J. - 800202201

Project Coordinator: ELSTON, MARISA J. - 800202201

Date Created\*: 10/24/2007

October 24, 2007

Est. Design Complete Date: 10/24/2007

October 24, 2007

Project Priority: 1

Department Code: 13900

Division Code: 1240

Index/Fund Account: 118100

Banner Account Code: 928350

PAM Comments:

FAM Comments:

Additional Information:

Special Information:

Project Benefit:

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# REVIEW Action

(63)



ARCHIBUS Web Central - Windows Internet Explorer

**Project Information**

Project Number: 07-0000    Control Code: FM-335    Project Status Block: Approved Design & Estimate    Project Priority: 1

Date Requested: 10/24/2007    Department Code: 13900    Project Description\*: Template    Project Account Manager: DINELLO, RAYMOND - 800202255

October 24, 2007

Building Code: 0055    Building Name: Facilities Management & Police

**FM Project Sheet**

Shop/Zone Code	Description	Estimated Labor Hours	Estimated Labor Cost	Estimated Cost of Materials	Estimated Cost of Contract	Estimated Total For Action
DS00	Design Services Contracts	0	0.00	0.00	5,200.00	5,200.00
HK00	Housekeeping (Shop 13)	3	53.64	0.00	0.00	53.64
HKR01	Recycling (Shop 19)	3	66.12	0.00	0.00	66.12
MO01	Electrical (Shop 11)	40	1,031.20	375.00	0.00	1,406.20
MO02	Fire systems (Shop 11)	0	0.00	0.00	0.00	0.00
MO04	Plumbing (Shop 12)	0	0.00	0.00	0.00	0.00
MO05	Heating Ventilation and Air Conditioning (Shop 12)	0	0.00	0.00	0.00	0.00
MO07	General Services Renovations & Projects (Shop 14)	80	1,996.80	4,275.00	0.00	6,271.80
MO08	General Service Key, Locks and Card Access (Shop 14)	0	0.00	0.00	0.00	0.00
MO09	Grounds & Roads (Shop 15)	0	0.00	0.00	0.00	0.00
MO13	Zone 1 Maintenance (Z1)	0	0.00	0.00	0.00	0.00
MO14	Zone 2 Maintenance (Z2)	0	0.00	0.00	0.00	0.00

**Amendments**

Shop/Zone Code	Description	Estimated Labor Hours	Estimated Labor Cost	Estimated Cost of Materials	Estimated Cost of Contract	Estimated Total For Action
DS00	Design Services Contingency					1,299.78
DS00	Project Initiation Fee					300.00
DS00	Project Administration Fee					89.93

**Additional Charges**

Shop/Zone Code	Description	Estimated Total For Action
DS00	Design Services Contingency	1,299.78
DS00	Project Initiation Fee	300.00
DS00	Project Administration Fee	89.93

**Project Total**

Estimated Total Project Cost: 14,687.47

Done    Local intranet    100%



# Design Services Process

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



# Approve or Reject Amendments (55)

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## Tasks :

### Process:

- Approve or Reject Project Request
- Approve or Reject Scope Budget Estimate
- Edit Funding
- Approve or Reject Design and Estimate
- Approve or Reject Amendments

### Reports:

- Project History
- Project Priority List

## Actions:

Document(s)

Review

Approve

Reject

Cancel

ARCHIBUS

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

Project Management

Financial Account Manager

Tasks:

- Approve or Reject Project Request
- Approve or Reject Scope Budget Estimate
- Edit Funding
- Approve or Reject Design and Estimate
- Approve or Reject Amendments

Reports:

- Project History
- Project Priority List

Approve Projects Amendments

Project Number	Project Name	Project Status Block
07-0000	PROJECT REQUEST	Approved Amendment

Project Information

Control Code: FM-335

Project Name\*: PROJECT REQUEST

Project Account Manager: DINELLO, RAYMOND - 800202255

Financial Account Manager: DINELLO, RAYMOND - 800202255

Scope Budget Manager: ELSTON, MARISA J. - 800202201

Project Coordinator: ELSTON, MARISA J. - 800202201

Est. Design Complete Date: 10/24/2007

October 24, 2007

Reason for Rejection:

Amendments

Shop/Zone Code	Description	Estimated Labor Hours	Estimated Labor Cost	Estimated Cost of Materials	Estimated Cost of Contract	Estimated Total For Action
MO08	Adding card access to entry door.	15	374.40	289.99	0.00	664.39

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Amendment(s) being reviewed.



# Project Priority List

(59)

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## Tasks :

### Process:

- Approve or Reject Project Request
- Approve or Reject Scope Budget Estimate
- Edit Funding
- Approve or Reject Design and Estimate
- Approve or Reject Amendments

### Reports:

- Project History
- Project Priority List

ARCHIBUS

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### Design Services Project Priority List

Project Priority	Control Code	Department Code	Sub-Department Name	Project Status Block	Building Code	Building Name	Project Description	Date Created	Proje
0	FM-001	13900	Facilities Management AVC	Rejected	0039	Auxiliary Services Building		7/13/2007	STEPH
0	FM-002	13900	Facilities Management AVC	Rejected				7/13/2007	STEPH
0	FM-004	13900	Facilities Management AVC	Rejected				7/13/2007	STEPH
0	FM-011	13900	Facilities Management AVC	Rejected				7/19/2007	STEPH
3	FM-030	13900	Facilities Management AVC	Punch List				10/10/2007	ELSTC
3	FM-035	13900	Facilities Management AVC	In Construction				10/19/2007	ELSTC
3	FM-036	13900	Facilities Management AVC	FM Scheduling				10/16/2007	ELSTC
0	FM-037	13900	Facilities Management AVC	Submitted	0004	Atkins		10/19/2007	ELSTC
3	FM-333	13900	Facilities Management AVC	FM Scheduling	0055	Facilities Management & Police		10/20/2007	ELSTC
1	FM-335	13900	Facilities Management AVC	FM Scheduling	0055	Facilities Management & Police	Project Description	10/24/2007	DINEL

Done

Local Intranet 100%

Control Code should be used when referencing a project.



# Design Services Process

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



## Facility Information Systems points of contacts:



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