

BOT Project Flow

1. **INITIATION:** BOT projects are launched into AiM by the program manager, and initially saved in an INITIATION status. Once the program manager has completed the initial project setup, he will change the status to ASSIGN PM
 2. **ASSIGN PM:** The OUA Coordinator will have a query on their workdesk alerting them to projects in this status. OUA Coordinator will be responsible for updating the project, updating the project team (DESIGN PM and UPL responsibilities) as well as the EMPLOYEE field on the main project screen. Once those updates are complete, manually change the status to PREDESIGN
 3. **PREDESIGN:** UPL will have a query on their desktop to easily identify projects in this status. During PREDESIGN, the UPL should:
 - a. Populate BOT1 milestone date
 - b. Advertise, interview, and recommend A/E and or CM
 - c. Prepare draft budget
 - d. Prepare draft schedule
 - e. Populate BOT2 milestone date and change the status to BUDGET/CONTRACT
 4. **BUDGET/CONTRACT:** UPL will have a personal query on their WorkDesk to identify projects in this status. During this time the UPL will:
 - a. Build Design Only budget in AiM & Launch Budget Approval workflow if this hasn't already occurred
 - b. Wait for budget approval
 - c. Publish schedule to AiM.
 - d. Begin A/E Design Contract and/or CM Contract Process
 - e. Once contract(s) have been approved and finalized, manually change status to SD
- **NOTE: BOT3 Approval can be received during SD, DD, or CD status. When received, input BOT3 milestone date and launch Budget Revision for University Route, Design & Construction budget in AiM.**
5. **SD:** UPL will have a personal query on their WorkDesk to identify projects in this status. During this time the UPL will:
 - a. Revise budget and schedule, as required
 - b. Await SD Drawings
 - c. Initiate Design Review
 - d. If internal estimate is needed, launch the Estimate Workflow
 - e. Once SD review & estimate (internal/external) are complete, manually change status to DD
 6. **DD:** UPL will have a personal query on their WorkDesk to identify projects in this status. During this time the UPL will:
 - a. Revise budget and schedule, as required
 - b. Review Drawings
 - c. If internal estimate is needed, launch the Estimate Workflow
 - d. When DD Review & estimate (internal/external) are complete, manually change status to CD

7. **CD:** UPL will have a personal query on their WorkDesk to identify projects in this status. During this time the UPL will:
 - a. Revise budget and schedule, as required
 - b. Initiate Design Review for 50% drawings
 - c. If internal estimate is needed, launch the Estimate Workflow
 - d. Initiate Design Review for 95% drawings
 - e. Launch the Estimate Workflow
8. **BIDDING:** UPL will have a personal query on their WorkDesk to identify projects in this status. During this time the UPL will:
 - a. Revise budget and schedule, as required
 - b. Advertise
 - c. Bid
 - d. When the above tasks are complete, manually change status to CONST CONTR.
9. **CONST CONTR:** UPL will have a personal query on their WorkDesk to identify projects in this status. During this time the UPL will:
 - a. Initiate Construction Contract Process in Contract Administration Module
 - b. Once Contract has issued NTP:
 - i. Update the EMPLOYEE field on the main project screen to Construction PM
 - ii. Update the project team changing UPL to the Construction PM.
 - iii. Manually change project status to CONSTRUCTION.

➤ *NOTE: At this point, the Construction PM has assumed the responsibility of University Project Lead.*

10. **CONSTRUCTION:** UPL will have a personal query on their WorkDesk to identify projects in this status. During this time the UPL will initiate & manage all project activities, including but not limited to:
 - Project schedule
 - Submittals
 - Meeting Minutes
 - Progress Reports
 - Issues
 - RFIs
 - CCDs
 - Change Orders
 - Data Reports
 - Punch Lists

At substantial completion, the UPL will manually change the status to WARRANTY/CLOSEOUT

11. **WARRANTY/CLOSEOUT:** UPL will have a personal query on their WorkDesk to identify projects in this status. During this time the UPL will"
 - a. Reconcile the budget with revisions, as necessary

- b. Oversee warranty process
- c. Compile Closeout Documents
- d. Manually change status to Financial Closeout.

12. FINANCIAL CLOSEOUT: Financial Services will have a query on their WorkDesk alerting them to projects in this status. During this time, Financial Services will:

- a. **{Check with bob/fan for description}**
- b. Manually change the status to **CLOSED**.

13. CLOSE

Additional Status Codes

CANCELED: Up until the point that a budget has been approved, a project can be canceled. However, if money has been spent projects must go to FINANCIAL CLOSEOUT status.

HOLD: A project may be placed on HOLD at any time.