

ORIGINAL BUDGET

Budgets may be entered and routed for approval at any time. The project does not have to be in a certain status to route the original budget for approval.

To prepare the budget in AiM, you will use the Budget Manager.

If you are on the project screen in AiM, there is a link on the top left.

Capital Project

Back Edit Search Browse

Action

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- [Budget Manager](#)
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View

15-188

Samford Hall - 3rd Floor, Provide A New Hydration Station

Organization	158101
	PROVOST & VP ACADEMIC AFFAIRS

You can also go directly into the Budget Manager screen.

Quick Search

15-188 Budget Manager

Once you are on the Budget Manager screen, click Edit

Budget Manager

Edit Search

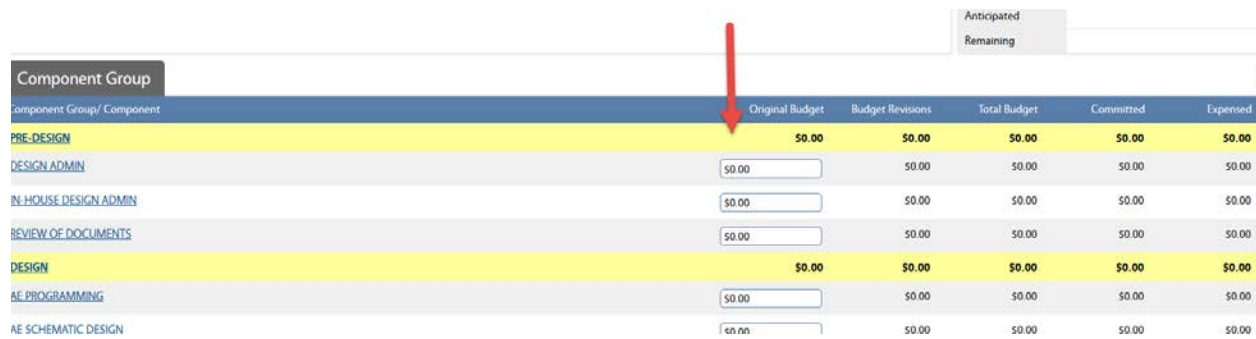
Action

- [Date Manager](#)

15-188

Samford Hall - 3rd Floor, Provide A New Hydration Station

The original budget column becomes available for edit.



The screenshot shows a budget table with the following columns: Component Group/Component, Original Budget, Budget Revisions, Total Budget, Committed, and Expensed. A red arrow points to the 'Original Budget' column. The table contains the following data:

Component Group/Component	Original Budget	Budget Revisions	Total Budget	Committed	Expensed
PRE-DESIGN	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
DESIGN ADMIN	<input type="text" value="\$0.00"/>	\$0.00	\$0.00	\$0.00	\$0.00
IN-HOUSE DESIGN ADMIN	<input type="text" value="\$0.00"/>	\$0.00	\$0.00	\$0.00	\$0.00
REVIEW OF DOCUMENTS	<input type="text" value="\$0.00"/>	\$0.00	\$0.00	\$0.00	\$0.00
DESIGN	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
AE PROGRAMMING	<input type="text" value="\$0.00"/>	\$0.00	\$0.00	\$0.00	\$0.00
AE SCHEMATIC DESIGN	<input type="text" value="\$0.00"/>	\$0.00	\$0.00	\$0.00	\$0.00

In AiM, each individual line item of the Budget is referred to as a Component.

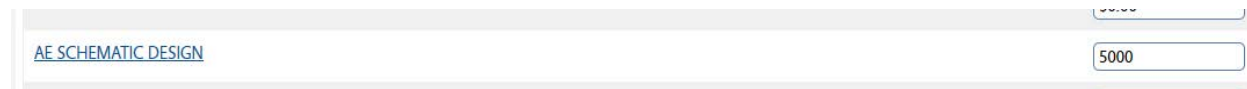
In the screenshot above, AE PROGRAMMING and AE SCHEMATIC DESIGN are *Components*.

Component Groups are made up of individual components.

There are 5 component groups available in AiM:

- PRE-DESIGN
- DESIGN
- CONSTRUCTION
- FF&E
- CONTINGENCY

To enter a budget amount, simply click in the field and type the number. Do not format (no \$ or ,) – the system will do that for you. For example, to enter 5000 to Schematic Design, click in the original budget column and enter 5000



The screenshot shows a form with the following fields:

AE SCHEMATIC DESIGN	<input type="text" value="5000"/>
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To enter a Note that will appear on the printed budget, click the component name to drill into the component:



The screenshot shows a list of components with a red arrow pointing to 'AE SCHEMATIC DESIGN':

- DESIGN
- AE PROGRAMMING
- AE SCHEMATIC DESIGN
- AE DESIGN DEVELOPMENT

This drills you into the Project Component screen. Here you see the details for that specific budget line item.

Click on the Notes Log:

The screenshot shows a software interface for a 'Project Component'. At the top, there is a header with a hamburger menu icon and the text 'Project Component'. Below this is a navigation bar with a 'Back' button (containing a left arrow) and an 'Edit' button. A left-hand sidebar contains several sections: 'Action' with links for 'ViewFinder', 'Email', and 'Print'; 'View' with a list of options including 'Extra Description', 'Workflow', 'Account Setup', 'Property/Asset', 'Labor Charges', 'Contracts', 'Work Orders', 'Issues', 'Sent Email', 'Notes Log' (highlighted with a red arrow), 'User Defined Fields', 'Status History', and 'Related Documents'. The main content area is titled 'AE SCHEMATIC DESIGN' in a yellow header. Below this, the text 'AE SCHEMATIC DESIGN' is repeated. A table-like structure shows 'Capital Project' with a value of '15-192' and a description 'East Glenn Administrative S...'. Below that, 'Component Group' is listed as 'DESIGN'. Further down, 'Organization' and 'Employee' fields are visible but empty. At the bottom, a 'Checklist' section is partially visible with a table header showing 'Item' and 'Description'.

Click Add

Notes Log

Done

SHANDA About Help Logout

AIM

AE SCHEMATIC DESIGN

Created By: On 07/02/2015 12:00 AM
Last Edited by SHANDA FOSTER On 08/17/2015 12:49 PM

Add to Main Workdesk: No
Add to Module Workdesk: No

Note Type:
Channel Title:

Notes Log

Entry Date	Created By	Name	Note Type	Notes
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Add

Type the information you want to display on the budget report, click SAVE. Then DONE. Then BACK.

Note

Save Cancel

5

AE SCHEMATIC DESIGN

Created By: On 07/02/2015 12:00 AM
Last Edited by SHANDA FOSTER On 08/17/2015 12:49 PM

Entry Date: Aug 17, 2015 01:11 PM
Created By: SLF0015
SHANDA FOSTER

Note Type:

Notes

This is a note that will appear on the budget report in the Notes/Rational column

After you have entered each line item, click Save.

When you are ready to route your budget for approval, you will need to run the Budget Report and attach as a related document. To run the report, Click Print from the top left section of the Budget Manager.

Budget Manager

Edit Search Browse

Action

[Date Manager](#)

[Cash Flow Projection](#)

[Email](#)

[Print](#)

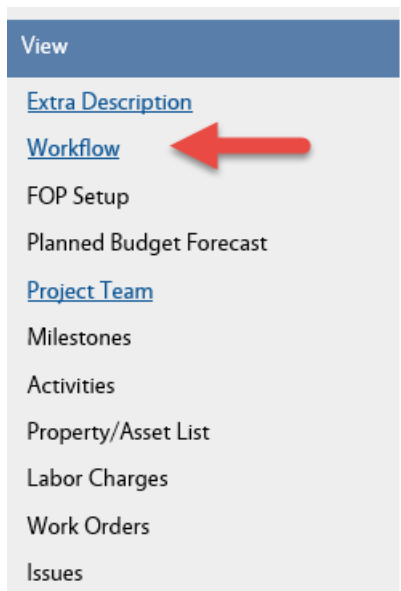
15-192

East Glenn Admi

Download the report, and then attach it to the project as a related document with type = BUDGET.

Launching the Budget Approval Workflow:

From the main project screen, if you are not in Edit mode – click Edit, then click the Workflow link.



The workflow screen displays a list of all workflows associated with the project. Most of the project workflows have an “Activate Status”; which means they will be automatically Activated when the project enters that status. However, because we need to route a budget at any time; our budget workflows are NOT tied to a certain status for activation. Instead, you will make the decision of which budget approval workflow is appropriate, and then *manually* Activate the workflow.

Workflow	Description	Template	Routing Method	Due Date	Activate Status	State
15087	Design Review	1068	Serial		DESIGN REVIEW	PENDING
15088	Scoping	1005	Serial		SCOPING	PENDING
15089	Design Revisions	1069	Serial		DESIGN REVISION	PENDING
15090	OIA Scope Review	1006	Serial		OIA SCOPE REVIEW	PENDING
15091	Design Approved	1070			DESIGN APPROVAL	PENDING
15092	Construction Scope Review	1007	Serial		CONSTR SCOPE REVIEW	PENDING
15093	Estimating Scope Review	1008	Serial		EST SCOPE REVIEW	PENDING
15094	Estimate Project	1009	Serial		ESTIMATE PROJECT	PENDING
15095	Design	1010	Serial		DESIGN	PENDING
15096	Budget Approval – Design Only – University Route	1011	Serial			PENDING
15097	Budget Approval – Design Only – Facilities Route	1012	Serial			PENDING
15098	Budget Approval – Design & Construction – University Route	1013	Serial			PENDING
15099	Budget Approval – Design & Construction – Facilities Route	1014	Serial			PENDING

The possible budget workflows are contained in the red box above. To determine which workflow to activate, ask yourself:

1. Does the budget include ONLY components in the DESIGN component group? If so, you will use one of the “Design Only” routes.

- a. If Budget < 500,000 and funding will be Facilities, Client or a split between the 2 – you may select the “Design Only Facilities Route”.
 - b. If >500,000 OR Funded by a source other than Facilities or Client you must select the “Design Only University Route”
2. If the budget includes construction components, you will choose from the “Design & Construction” options:
- a. If Budget < 500,000 and funding will be Facilities, Client or a split between the 2 – you may select the “Design & Construction Facilities Route”.
 - b. If >500,000 OR Funded by a source other than Facilities or Client you must select the “Design & Construction University Route”

(NOTE: in DEV, the budget approvals where construction is included do not contain the description of “Design & Construction” In DEV, you will select “University Route” or “Facilities Route”)

Click on the Workflow number to open the Workflow. Drop down the State field, and select “Active”.

The screenshot shows a workflow management interface. At the top, a yellow header bar displays the workflow ID '10726' and the text 'Last Edited by On 07/16/2015 05:52 PM'. Below this, a large text area contains the description 'Budget Approval ~ Design Only ~ Facilities Route'. To the right of the text area is a sidebar with several fields: 'State' is set to 'PENDING' (highlighted with a red box), 'Template' is '1012', 'Routing Method' is 'Serial', and 'Title' is empty. Below the main text area, there are two smaller sections: 'Capital Project' with the value '15-041' and 'Response Type' set to 'Validated'.

Click Done, Done, and then SAVE.