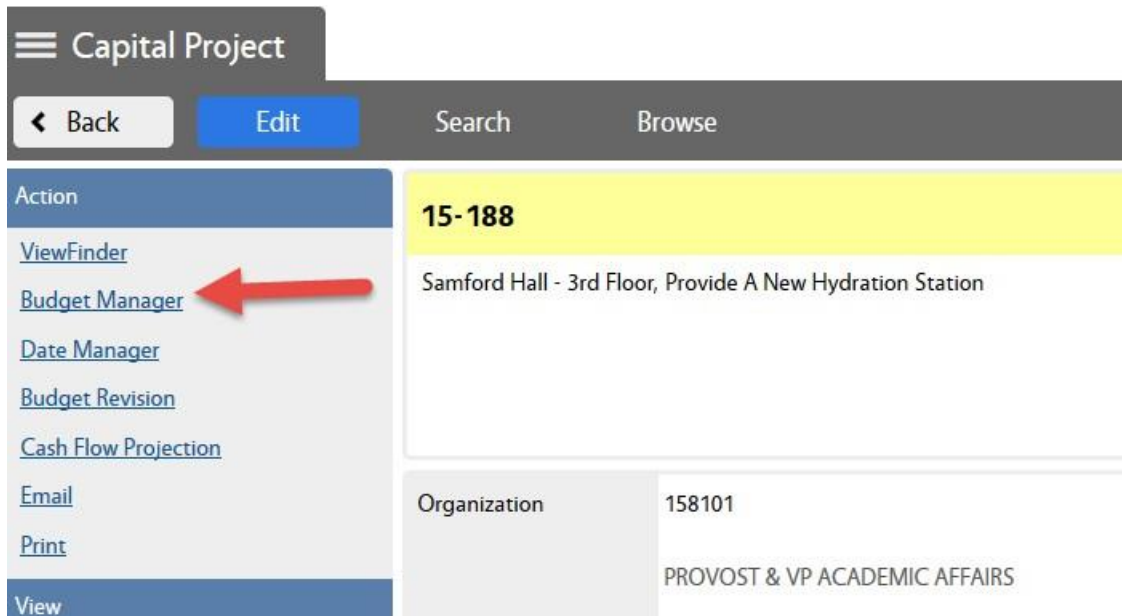


## ORIGINAL BUDGET

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.

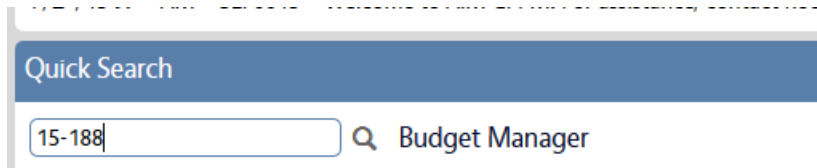
To prepare the budget in AiM, you will use the Budget Manager.

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



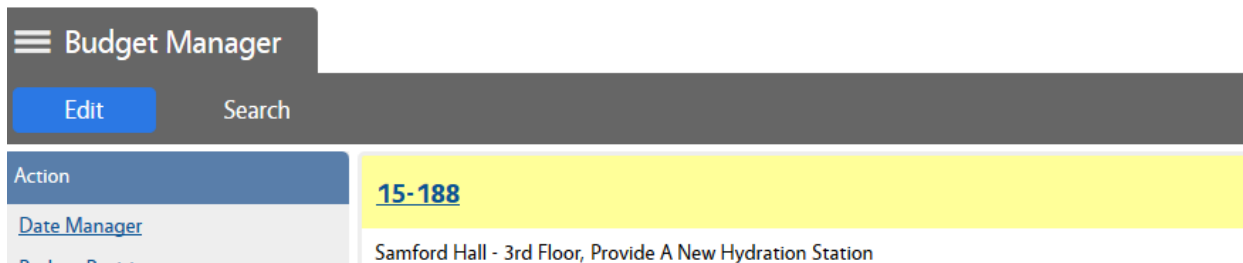
The screenshot shows the 'Capital Project' interface. At the top, there is a navigation bar with 'Back', 'Edit', 'Search', and 'Browse' buttons. Below this is a sidebar with an 'Action' menu containing links for 'ViewFinder', 'Budget Manager', 'Date Manager', 'Budget Revision', 'Cash Flow Projection', 'Email', and 'Print'. A red arrow points to the 'Budget Manager' link. The main content area displays the project ID '15-188' and the description 'Samford Hall - 3rd Floor, Provide A New Hydration Station'. Below the description, there is a section for 'Organization' with the value '158101' and the name 'PROVOST & VP ACADEMIC AFFAIRS'.

You can also go directly into the Budget Manager screen.



The screenshot shows a 'Quick Search' bar. The search term '15-188' is entered in the input field. The search results show 'Budget Manager'.

Once you are on the Budget Manager screen, click Edit



The screenshot shows the 'Budget Manager' interface. At the top, there is a navigation bar with 'Edit' and 'Search' buttons. Below this is a sidebar with an 'Action' menu containing links for 'Date Manager'. The main content area displays the project ID '15-188' and the description '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 Expended. 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	Expended
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.

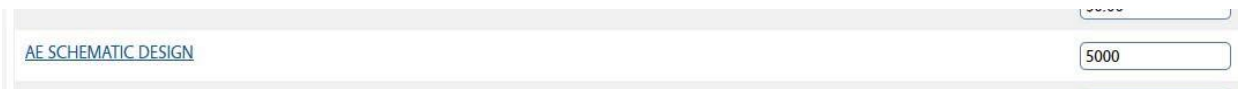
In the screenshot above, AE PROGRAMMING and AE SCHEMATIC DESIGN are *Components*.

*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 a dropdown menu set to 'AE SCHEMATIC DESIGN' and an input field containing the number '5000'.

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: DESIGN, AE PROGRAMMING, AE SCHEMATIC DESIGN, and AE DESIGN DEVELOPMENT. A red arrow points to 'AE SCHEMATIC DESIGN'.

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 mobile application interface for a 'Project Component'. At the top, there is a dark grey header with a hamburger menu icon and the text 'Project Component'. Below this is a navigation bar with a 'Back' button (left arrow) and an 'Edit' button (blue). The main content area is split into two columns. The left column is a sidebar menu with a blue header 'Action' containing links for 'ViewFinder', 'Email', and 'Print'. Below this is a 'View' section with a blue header and a list of options: '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 right column displays the details for the selected component, 'AE SCHEMATIC DESIGN', which is highlighted in yellow. Below the title, the text 'AE SCHEMATIC DESIGN' is repeated. Further down, there are sections for 'Capital Project' (15-192, East Glenn Administrative S), 'Component Group' (DESIGN), 'Organization', and 'Employee'. At the bottom, there is a 'Checklist' section with a table header: 'Item' and 'Description'.

Item	Description
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Click Add

Notes Log

Done

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: [input type="text"]

Channel Title: [input type="text"]

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

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: [input type="text"]

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

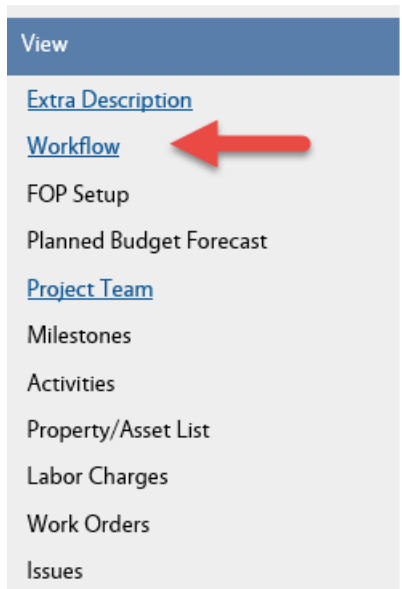
15-192

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.

The screenshot shows the Workflow screen. At the top, there is a header with 'Workflow' and 'AiM'. Below the header, there is a 'Back' button and a 'Refresh' button. The main content area displays a workflow card for '15-309' with details: 'Created By CHARLES BERRY On 09/30/2015 03:33 PM', 'Last Edited by CHARLES BERRY On 09/30/2015 03:48 PM', 'Type: FAC\_OPS\_ONLY', 'Projects managed entirely by Facilities', and 'Status: SCOPING'. Below the card, there is a 'Workflow' section with a table of workflows. The first row, '103004 Budget Approval', is circled in red.

Workflow	Description	Template	Routing Method	Due Date	Activate Status	State
103004	Budget Approval	1158	Serial			PENDING
103008	Budget Approval ~ Revisions Required	1163	Serial			PENDING
103014	Financial Closeout ~ Complete Financial Closeout and MANUALLY change project status to Closed.	1178	Serial			PENDING

The budget workflow for Facility Operations is indicated in the red circle above.

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

<b>10726</b>		Last Edited by On 07/16/2015 05:52 PM	
Budget Approval ~ Design Only ~ Facilities Route		State	PENDING
		Template	1012
		Budget Approval ~ Design Only ~ Facilities	
		Routing Method	Serial
		Title	
Capital Project	15-041	Response Type	Validated

Click Done, Done, and then SAVE.