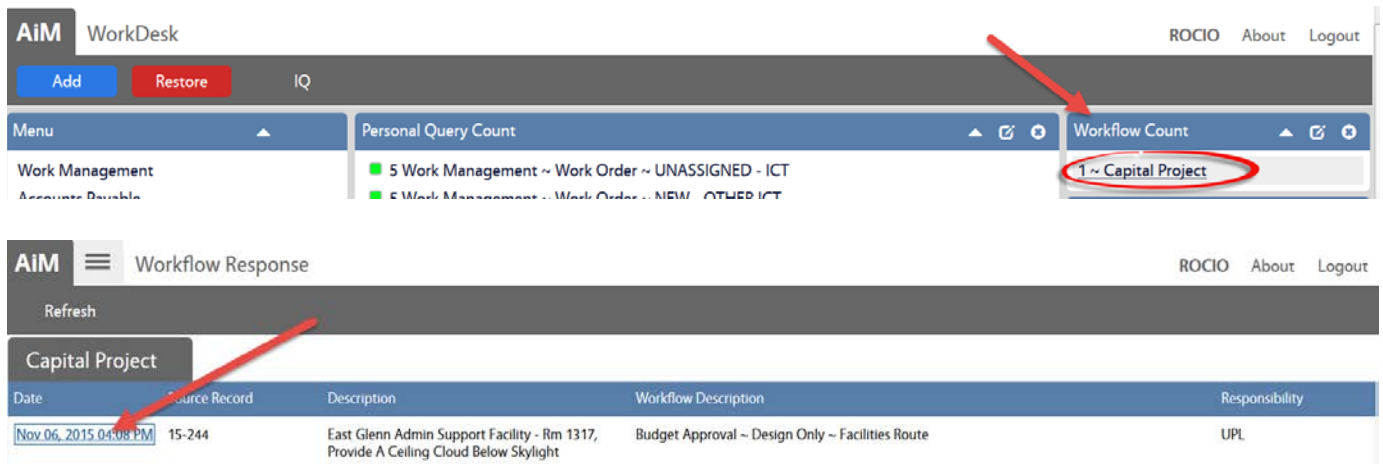


ORIGINAL BUDGETS – Revisions Required and Re-routing

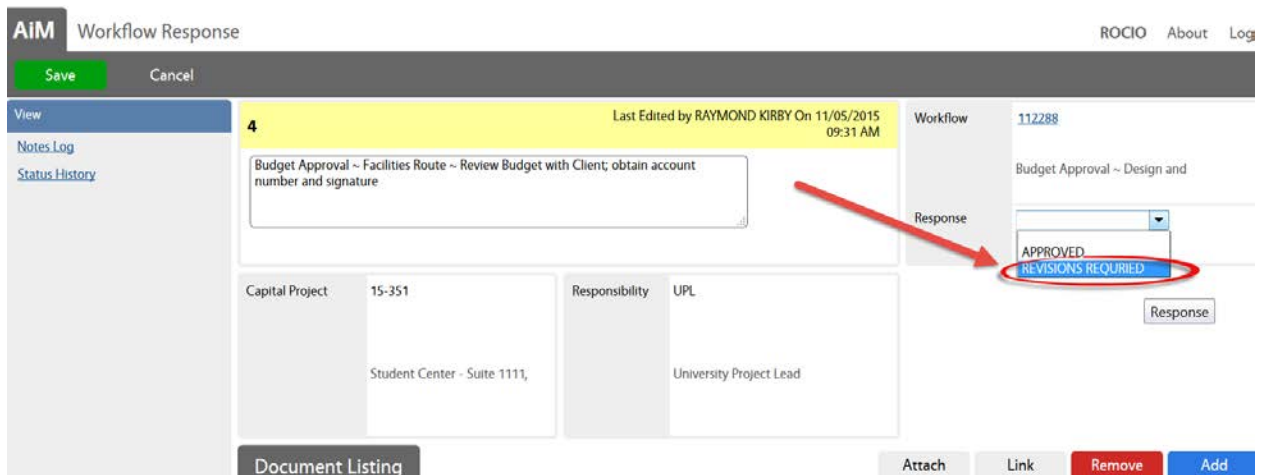
If an Original Budget needs revisions while it is routing, the UPL or any individual requesting revisions MUST use his/her Budget Workflow to respond with a “Revisions Required”:

1. Go to your **Workflow Count** section on your WorkDesk and select the link to the project.



The screenshot shows the AIM WorkDesk interface. In the top navigation bar, there are buttons for 'Add' and 'Restore', and a search field with 'IQ'. Below this is a 'Menu' section with 'Work Management' and 'Accounts Payable'. The main content area shows 'Personal Query Count' with two items: '5 Work Management ~ Work Order ~ UNASSIGNED - ICT' and '6 Work Management ~ Work Order ~ NEW - OTHER ICT'. On the right, there is a 'Workflow Count' section with a dropdown menu showing '1 ~ Capital Project', which is circled in red. A red arrow points to the 'Workflow Count' link in the top navigation bar.

2. Click on Edit → Response → Revisions Required → Save



The screenshot shows the AIM Workflow Response interface. At the top, there are buttons for 'Save' and 'Cancel'. Below this is a 'View' section with 'Notes Log' and 'Status History'. The main content area shows a workflow item with a yellow header '4' and 'Last Edited by RAYMOND KIRBY On 11/05/2015 09:31 AM'. The description is 'Budget Approval ~ Facilities Route ~ Review Budget with Client; obtain account number and signature'. Below this is a table with columns for 'Capital Project', 'Responsibility', and 'UPL'. The 'Capital Project' row shows '15-351' and 'Student Center - Suite 1111'. The 'Responsibility' row shows 'UPL' and 'University Project Lead'. On the right, there is a 'Workflow' section with '112288' and 'Budget Approval ~ Design and'. Below this is a 'Response' dropdown menu with options 'APPROVED' and 'REVISIONS REQUIRED', where 'REVISIONS REQUIRED' is circled in red. A red arrow points to the 'REVISIONS REQUIRED' option. At the bottom, there are buttons for 'Attach', 'Link', 'Remove', and 'Add'.

The Revisions Required response will terminate the routing, and the AiM system will change automatically the state of the Workflow to NoGo.

At this point, the UPL will make the necessary revisions to the Budget, print it/save it again from the Budget Manager module. Also, the Project’s related documents need to be updated with the new revised budget PDF file.

You should “replace” the budget file with your new version of the budget. To do this, please follow these steps:

1. From the Capital Project screen, select the “**Related Documents**” option under the *View* section:

- Click on the **Title** hyperlink of the budget's file or attachment that needs to be replaced.

AIM Related Documents ROCIO About Logou

Edit

Action

Download

15-351 Created By CHARLES BERRY On 10/27/2015 07:44 AM
Last Edited by MATTHEW WAGNER On 11/05/2015 09:16 AM

Student Center - Suite 1111, Provide Card Access For Student Media Offices

Document Listing

Reset Filter

From To

Thumbnail	Title	Current Version	Document Type	Extra Description	Related On
Click to view	Project Strategy Form - Project 15-351	1.0	Strategy Forms		Nov 20, 2015
Click to view	AUR&RRequestFormV14-2015-10-20.pdf	1.0	BUDGET		Nov 05, 2015
Click to view	15-351 Project Budget.pdf	1.0	BUDGET		Nov 05, 2015
Click to view	15-351 Construction Set.pdf	1.0	DESIGN DOCUMENTS		Nov 05, 2015

- The Document Profile window will open with the details of the attachment. Click on the **“Check Out”** option under the Action section.

AIM Document Profile ROCIO About Logou

Back Delete Edit New Search

Action

7CBABB4F-1885-4747-845D-16B3E91237D9

15-177 Conceptual Budget.pdf

Check Out

Lock Document

Email

View

Extra Description

Version History

Attributes

State History

Tags

Created By MLD0016

Date Created Nov 06, 2015 02:10 PM

File Name 15-177 Conceptual Budget.pdf

Type BUDGET

State Available

Checked Out By

Current Version 1.0

- Click on **YES**

Message

Are you sure you want to check out this document?

Yes No

Yes - Quick Key: Y

5. Click on “Check In”

The screenshot shows the AIM Document Profile interface. The top navigation bar includes 'AIM', 'Document Profile', 'ROCIO', 'About', and 'Logout'. Below the navigation bar are buttons for 'Back', 'New', and 'Search'. The main content area displays the document ID '7CBABB4F-1885-4747-845D-16B3E91237D9' and the file name '15-177 Conceptual Budget.pdf'. A left sidebar contains an 'Action' menu with 'Check In' highlighted in a red box and a red arrow pointing to it. Other actions include 'Cancel Check Out' and 'Email'. Below the 'Action' menu is a 'View' menu with options like 'Extra Description', 'Version History', 'Attributes', and 'State History'. The main content area also shows metadata such as 'Created By: MLD0016', 'Date Created: Nov 06, 2015 02:10 PM', 'Type: BUDGET', and 'File Name: 15-177 Conceptual Budget.pdf'. On the right side, there is a 'Project Budget' table and a 'State' section indicating 'Checked Out' by 'RME0013' with a 'Current Version' of '1.0'.

6. Click on **Browse** to retrieve the new file that you need to attach

The screenshot shows the 'New Document' dialog box. It has a title bar with a hamburger menu icon and the text 'New Document'. Below the title bar are 'Done' and 'Cancel' buttons. The main area contains the text 'Please select document to check in:' followed by a 'Browse...' button and the text 'No file selected.'. Below this are radio buttons for 'Major Version' and 'Minor Version', and a 'Comments' text area.

(Major Version / Minor Version and Comments are optional.)

7. Click on **Save**

The screenshot shows the 'Document Profile' dialog box. It has a title bar with a hamburger menu icon and the text 'Document Profile'. Below the title bar are 'Save' and 'Cancel' buttons. The 'Save' button is circled in orange. Below the buttons is a 'View' menu with options like 'Extra Description', 'Version History', 'Attributes', and 'State History'.

Now, you are ready to route your revised Original Budget. You will have to search for the appropriate Budget Approval Workflow with the “**PENDING**” state. (The workflow with the NOGO status cannot be used ever again.)

AiM Workflow ROCIO About Logos

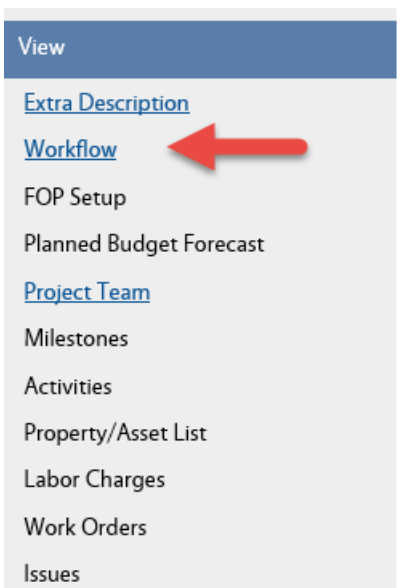
Done Cancel

Workflow Remove Add

Workflow	Description	Template	Routing Method	Due Date	Activate Status	State
					REVIEW	
<input type="checkbox"/> 112281	Estimating Scope Review	1008	Serial		EST SCOPE REVIEW	PENDING
<input type="checkbox"/> 112282	Conceptual Estimate	1009	Serial		ESTIMATE PROJECT	PENDING
<input type="checkbox"/> 112283	Quick Hit Estimate	1137	Serial		QUICK HIT ESTIMATE	PENDING
<input type="checkbox"/> 112284	Design	1010	Serial		DESIGN	PENDING
<input type="checkbox"/> 112285	Budget Approval ~ Design Only~ University Route	1011	Serial			PENDING
<input type="checkbox"/> 112286	Budget Approval ~ Design Only ~ Facilities Route	1012	Serial			PENDING
<input type="checkbox"/> 112287	Budget Approval ~ Design and Construction ~ University Route	1013	Serial			PENDING
<input type="checkbox"/> 112288	Budget Approval ~ Design and Construction ~ Facilities Route	1014	Serial			NOGO
<input type="checkbox"/> 112290	Transfer to Construction -	1143	Serial		TRANSFER CONST	PENDING
<input type="checkbox"/> 12136	Budget Approval ~ Design and Construction ~ Facilities Route	1014	Serial			PENDING

Launching the Budget Approval Workflow:

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



You will make again the decision of which budget approval workflow is appropriate, and then *manually* Activate the workflow.

AIM Workflow ROCIO About Logot

Done Cancel

Workflow Remove Add

Workflow	Description	Template	Routing Method	Due Date	Activate Status	State
					REVIEW	
<input type="checkbox"/> 112281	Estimating Scope Review	1008	Serial		EST SCOPE REVIEW	PENDING
<input type="checkbox"/> 112282	Conceptual Estimate	1009	Serial		ESTIMATE PROJECT	PENDING
<input type="checkbox"/> 112283	Quick Hit Estimate	1137	Serial		QUICK HIT ESTIMATE	PENDING
<input type="checkbox"/> 112284	Design	1010	Serial		DESIGN	PENDING
<input type="checkbox"/> 112285	Budget Approval ~ Design Only~ University Route	1011	Serial			PENDING
<input type="checkbox"/> 112286	Budget Approval ~ Design Only ~ Facilities Route	1012	Serial			PENDING
<input type="checkbox"/> 112287	Budget Approval ~ Design and Construction ~ University Route	1013	Serial			PENDING
<input type="checkbox"/> 112288	Budget Approval ~ Design and Construction ~ Facilities Route	1014	Serial			NOGO
<input type="checkbox"/> 112290	Transfer to Construction -	1143	Serial		TRANSFER CONST	PENDING
<input type="checkbox"/> 12136	Budget Approval ~ Design and Construction ~ Facilities Route	1014	Serial			PENDING

The possible budget workflows have the PENDING state. You will want to activate the same type of workflow that you had selected at the first routing.

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

10726 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 ▼

2. Click Done, Done, and then SAVE.