

SCOPING

Search AiM

15-188 Created By On 06/29/2015 12:00 AM
Last Edited by SHANDA FOSTER On 07/26/2015 08:23 AM

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

Status: **SCOPING** (indicated by red arrow)
Type: DESIGN_CONSTRUCT
Design & Construction Projects. Used for both
Reference Number

You will receive an email notification when a project has been assigned to you. The project will be in a Status of “SCOPING” (see red arrow above)

The project will remain in “SCOPING” status until you are ready to submit your Scope for Review.

Follow the steps below to submit your scope for review:

Login to AiM, and on your main WorkDesk, locate the “Workflow Count” channel.

The SCOPING workflow is a workflow attached to the Project, so you will see “Capital Project” listed. IN the example below, there is 1 pending Capital Project Workflow for Daniel:

WorkDesk DANIEL About Logout

Add AiM

Menu

- Administrator Messages
- Personal Query Listing
- Work Management
- Bid Management
- Capital Projects
- Contract Administration
- Customer Service
- Inventory
- Property

7/24/15 9:44 AM - SLF0015 - Welcome to AiM CP/MI For assistance, contact Rocio or Shanda Shanda's cell 334-740-2630 Rocio's cell 334-724-9658

Personal Query Count

Quick Search

Workflow Count (indicated by red arrow)

1 - Capital Project

Quick Links

Click on the words “Capital Project” in the Workflow Count channel. This drills you into a list of Capital Project workflows assigned to you. In the screenshot below, we see there is only 1 pending workflow for Daniel. You see the date the workflow was assigned, the project number, project description, workflow description, and responsibility.

Therefore, the screenshot below tells:

On Jul 26 project 15-188 was assigned to the UPL (Daniel) for Scoping.

Date	Source Record	Description	Workflow Description	Responsibility
Jul 26, 2015 08:23 AM	15-188	Samford Hall - 3rd Floor, Provide A New Hydration Station	Scoping	UPL

Click the date hyperlink to respond to this specific workflow:

Refresh			
Capital Project			
Date	Source Record	Description	Workflow Description
Jul 26, 2015 08:23 AM	15-188	Samford Hall - 3rd Floor, Provide A New Hydration Station	Scoping

1. Click Edit

The screenshot shows the 'Workflow Response' edit interface. At the top, there are 'Back' and 'Edit' buttons, with 'Edit' highlighted by a red arrow. The main content area displays a workflow card for 'Scoping', last edited by SHANDA FOSTER on 07/26/2015 08:23 AM. Below the card, there are fields for 'Capital Project' (15-188) and 'Responsibility' (UPL). A 'Document Listing' section is visible at the bottom.

2. Attach your Scope and any other relevant docs. Choose Document type "SCOPE"
Add any relevant Notes to the Notes Log
Change status to "Submit Scope for Review"
Save

The screenshot shows the 'Workflow Response' edit interface after several changes. The 'Save' button is highlighted with a red arrow. The 'Status' dropdown menu is set to 'SUBMIT SCOPE FOR REVIEW', also highlighted with a red arrow. The 'Document Listing' section at the bottom has an 'Add' button highlighted with a red arrow. The workflow card and other details remain the same as in the previous screenshot.

Your Scope has now been submitted to the AD Of Design for Review. After reviewing the scope, the AD will either Approve, or return to you for revisions.

If Approved, the AD Design will then determine if additional review of the Scope is required. If so, they will send the Scope forward. The table below contains the different status codes you may see your project in during Scope Approval.

Status Code	Purpose	Who has ball in court?
OUA Scope Review	Review by Office of Univ Architect	OUA Coordinator
AD Const Method	AD Design makes/confirms whether project will be IHC or CPM. AD Design ensures the AD CONSTR team member is set appropriately before sending Scope for Review	AD Design
CONSTR SCOPE REVIEW	Review by the AD Constr.	AD CONSTR team member. Note this could be either the AD IHC or AD CPM
AD EST METHOD	Determine type of estimate required: Internal, External or None	AD Design
EST SCOPE REVIEW	Review of scope by estimating; to ensure enough detail is included in scope to provide an estimate	Chief Estimator