

## ESTIMATING – CPPM IWA Review, Approval and NTP

After FM submits an estimate to Construction & Contract Services or LRF project manager, the Project Manager will perform the following actions in AiM.

### Receiving an FM Estimate

1. The FM Estimator will email a Facilities Management Estimate to you as a PDF attachment.
2. In AiM, from the Internal Work Agreement (IWA), click: **Edit**.  
*(Contract Administration > IWA)*
3. Set the **Status to UNDER REVIEW** and click: **Related Documents** (left side bar)
  - a. From **Document Listing**, Click: **Add**

- i. Click: **Choose File** button. Locate the new document on your computer.
- ii. Click: **NEXT**
- iii. Enter **Title** of document and select a **Type**, click Zoom.

- iv. Click: **NEXT** (3) times
  - v. **Optional:** Tags, Meta Data, Attributes and Permissions
  - vi. Click on a **Thumbnail** to view the document
  - vii. Click: **Done**, which returns you to the Internal Work Agreement screen
4. Review IWA for accuracy, click: **Save**

## Approving an FM Estimate

1. Open your IWA, set status to **APPROVED** and click: **Save**.

**AiM Internal Work Agreement** JAMES About Logout

Save Cancel

View **1307** Last Edited by AUBREY NEWMAN On 11/04/2015 02:38 PM

Extra Description: MCELROY 255, REPLACE CARPET.

Status: **APPROVED**

Type: FM IN HOUSE

Reference Number: [Empty]

Capital Project: CP16-0398

Related Documents

2. Click: **Related Documents** and view your FM estimate. Click: **Work Order number link** to open the Work Order screen in AiM.

**STATE FACILITIES MANAGEMENT CONSTRUCTION ESTIMATE**

AIM Work Order: 16-0162935

Work Order: 16-0162935

Scope of Work: MCELROY HALL-255-ESTIMATE TO REPLACE CARPET ASSIGN JAMEZ FISHBURN ROUTINE

Date Created: Sep 4, 2015, 2:02 PM Facility: CENTRAL CAMPUS

Requester By: [Empty] Priority: MCELROY HALL

Department: VETERINARY PATHOBIOLOGY Status: ESTIMATE NEEDED

Line Items	Labor	Material	Equipment	Contract
Totals	0.00	\$0.00	\$0.00	\$0.00

3. Edit the **work order** and change the status to **ESTIMATE APPROVED**.

**AiM Work Order** Save Cancel

View **16-0162935**

CP16-0398 MCELROY HALL-255-ESTIMATE TO REPLACE CARPET ASSIGN JAMEZ FISHBURN ROUTINE

Organization: C5537 Region: OSU-STILLWATER

Requestor: VETERINARY PATHOBIOLOGY Facility: CENTRAL CAMPUS

Contact: JIM HARGRAVE Property: 0039

Contact Phone: 744-8476

Contact Email: jim.hargrave@okstate.edu

Status: **ESTIMATE APPROVED**

Phase

Phase	Description	Location	Shop	Work Code	Priority	Status
001	MCELROY HALL-255-ESTIMATE TO REPLACE CARPET ASSIGN JAMEZ FISHBURN ROUTINE	255	CONSTRUCT & CONTRACT SVCS	CARPET REPAIR/INSTALL	PROJECTS	ESTIMATE APPROVED

4. Open the **phase** and set the phase status to **ESTIMATE APPROVED**.

5. From Work Order screen, click: **Save**

After performing these steps, your AiM Contract Administration WorkDesk will show the IWA is approved. *There is no further action required until the NTP is issued.*

Capital Project Dashboard

1	Contract Administration ~ Internal Work Agreement ~ IWA FM IN HOUSE-APPROVED
0	Contract Administration ~ Internal Work Agreement ~ IWA FM IN HOUSE-CANCELED
61	Contract Administration ~ Internal Work Agreement ~ IWA FM IN HOUSE-NTP
0	Contract Administration ~ Internal Work Agreement ~ IWA FM IN HOUSE-ON HOLD

Additionally, FM managers and Estimators will be notified on their AiM WorkDesks that their estimate has been approved, but will not take further action on the project until the NTP is issued.

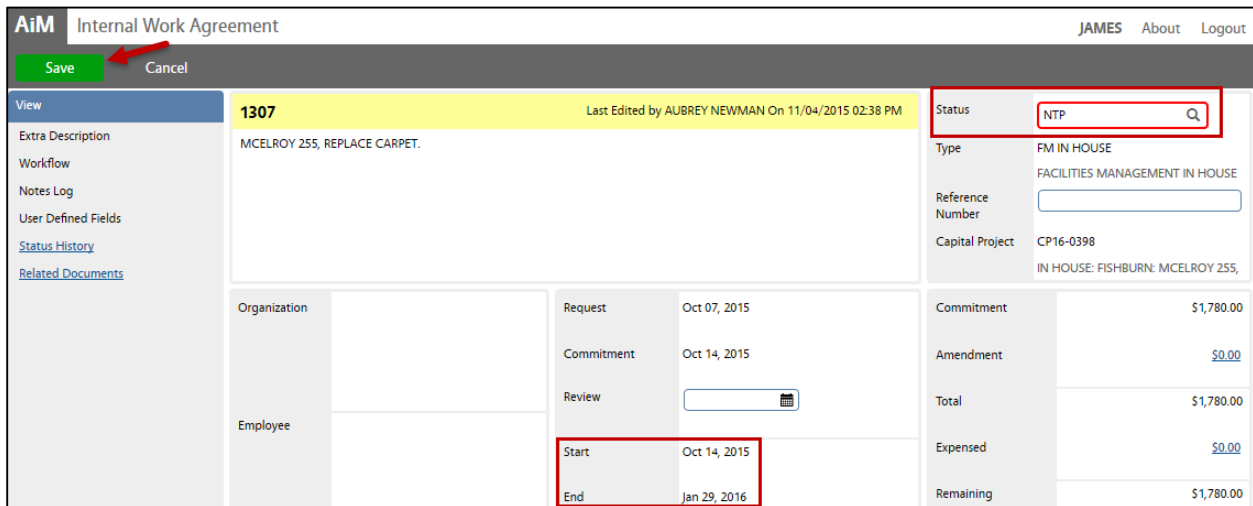


### Declining an FM Estimate

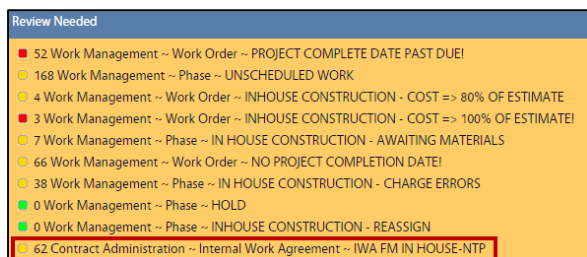
Similar to the approval process above, **update the status of your IWA to CANCELED** and **Save**. From **Related Documents**, view your FM Facilities estimate and **click the work order link** to open the work order. **Edit the work order and set the status to ESTIMATE DECLINED** and **save changes**. *This will cancel the NTP and also the FM estimated work order, removing the transactions from all AiM WorkDesks.*

### Notice to Proceed

1. Open the IWA. Enter a **Commitment Date**, a **Start Date** and set the status to **NTP** and **SAVE**



Now your AiM Contract Administration WorkDesk will show that your IWA status is no longer approved, it's now shows on your IWA



NTP channel. No further action is required on your IWA until project closeout.

Similarly, FM managers will be notified on their AiM WorkDesks that the approved work order has been issued an NTP. *At that time the FM manager attaches your IWA to the work order and initiate service.*

## Attach IWA to Work Order

1. Open your IWA, click: **Capital Project link**

**AiM** Internal Work Agreement JAMES About Log

Buttons: Edit, New, Search

**Action** **1307** Last Edited by AUBREY NEWMAN On 11/04/2015 02:38 PM

Internal Work Amendment: MCELROY 255, REPLACE CARPET.

Status: [NTP](#)

Type: FM IN HOUSE  
FACILITIES MANAGEMENT IN

Reference Number: **Capital Project** [CP16-0398](#)

2. Click: **Work Orders** (left side bar)
3. Click: **Phase # link**

**AiM** Work Orders Back

Buttons: Back, Edit, New, Search

**CP16-0398** Created By BOBBI TODD On 10/08/2015 09:08 AM  
Last Edited by JULIE BAER On 10/14/2015 01:57 PM

IN HOUSE: FISHBURN: MCELROY 255, REPLACE CARPET.  
JIM HARGRAVE, 4-8476, JIM.HARGRAVE@OKSTATE.EDU

Work Order	Phase	Description
<a href="#">16-0169073</a>	<a href="#">001</a>	IWA #1306 NEED TO HAVE FLOORING REMOVED IN ROOM 255 BEGINNING NOVEMBER 2ND.
<a href="#">16-0169075</a>	<a href="#">001</a>	IWA # 1307 NEED CT UPHOLSTRY FURNITURE OPENED FOR SUPPORT OF THE INSTALLATION OF NEW CARPET AND COVE BASE NTE \$1350 #1203 FIX A FLAT, BLACK COVE
<a href="#">16-0169078</a>	<a href="#">001</a>	IWA #1307 NEED TO HAVE MOVES DEPARTMENT OPENED TO MOVE ITEMS FROM ROOM 255 AND BACK AFTER NEW CARPET IS INSTALLED. NEED TO HAVE 20 BOXES AND TAPE DELIVERED

**AiM** Capital Project Back Edit New Search

**CP16-0398**

IN HOUSE: FISHBURN: MCELROY 255, REPLACE CARPET.  
JIM HARGRAVE, 4-8476, JIM.HARGRAVE@OKSTATE.EDU

Organization: [C5537](#)  
VETERINARY PATHOBIOLOGY

Requestor: [10750092](#)  
JAMES FISHBURN

Manager Organization: [D0522](#)  
CONSTRUCTION & CONTRACT

Employee: [10750092](#)  
JAMES FISHBURN

Project Component Group

Component Group

4. From each Phase, click: **Edit**
5. Contract Type, select **Internal Work Agreement**
  - a. *Note: Capital Project is now linked to Work Order*
  - b. Select **Agreement and Line Item**

**AiM** Phase About Log

Buttons: Save, Cancel

**001** Created By MADALYN COBLE On 10/19/2015 11:22 AM  
Last Edited by GREGG JOHNSON On 10/21/2015 07:34 AM

Extra Description: [View](#)  
IWA #1306 NEED TO HAVE FLOORING REMOVED IN ROOM 255 BEGINNING NOVEMBER 2ND.

Status: [OPEN](#)

Work Order: [16-0169073](#)

Budget: \$0.00

Location: [255](#)  
255 FACULTY OFFICE

Shop: [CT-ASBESTOS](#)  
CENTRAL TRADES - STRUCTURAL TRADES -

Estimated Start: Oct 21, 2015 11:34 AM

Estimated End:

Actual Start:

Actual End:

Percent Complete:

Funding Method: [Capital Project](#)

Work Code Group:

Work Code: [ASBESTOS ABATEMENT](#)  
ASBESTOS ABATEMENT

Request Method:

Type:

Asset:

Asset Group:

Failure Code:

Priority: [PROJECTS](#)

Capital Project: [CP16-0398](#)

Contract Type: [Internal Work Agreement](#)

Component Group: [ASBESTOS FMCS](#)  
ASBESTOS

Agreement: [1306](#)  
MCELROY 255, REPLACE CARPET.

Line Item: [001](#)  
ABATEMENT

6. Click: **Save** and repeat for all phases.