

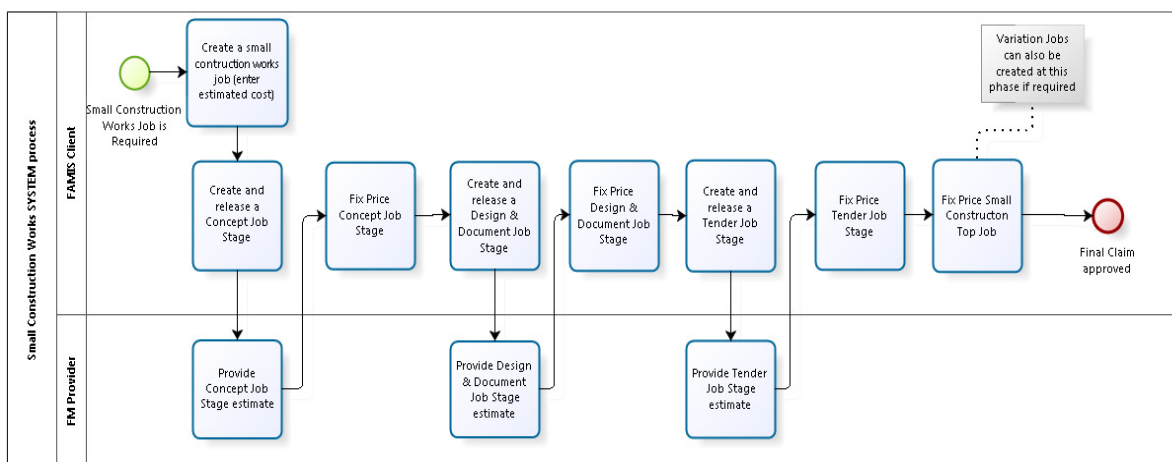


Work Instruction

Requesting Small Construction Works

This work instruction is to only to be used as a guide to operating small construction works jobs in the FAMIS system. For a detailed understanding of the small construction works process please refer to *Agency Work Procedure Manual*.

Small Construction Work requests are outlined in the process below, whereby all of the FAMIS Agency representative actions are performed in the FAMIS system, and FM Service Provider actions are all performed in their own systems, with the resulting data displayed in the FAMIS.



Small construction works comprises those facilities management services involving construction work costing \$150,000 (exclusive of GST) or more but less than \$1,000,000 (exclusive of GST). The limits for the values of SC are inclusive of construction costs and any costs to engage required professional services subcontractors.

The FM Service Provider must respond, procure and perform SC in accordance with the Small Construction Works Policies and Procedures Manual.

The *Agency Work Procedure Manual* provides information on policies and procedures related to SC that must be taken into consideration or implemented by the FM Service Provider and is based on the Construction Procurement Policy: Project Implementation Process (PIP). The FM Service Provider is to refer to the PIP for an overview of the required steps in delivering small construction projects.

In the FAMIS system, small construction works is comprised of a top job and three job stages; they are *concept* (also known as *SC Plan*), *design* and *tender* with a further three phases (*construction, review and complete*) which are all covered by the top SC Job.

Requesting Small Construction Works

Small construction works requests comprises of the following steps in FAMIS.

1. If an Agency representative requires a small construction job they must first create and release the small construction job (also known as the top SC Job) via the Work Request and Agreement tab.
2. Overnight, this job would then be received by the FM Service Provider and a job number would be created.
3. Once the job has a job number, then the Agency representative can create and release a *concept* stage job against the SC top Job (via the long-left menu option on the Job Tracking tab). The process of raising a job stage is the Agency representative asking the FM Service Provider to provide an estimate to complete that particular stage.
4. Once an FM Service Provider has provided an estimate of performing the *concept* stage job, via their FM works systems, these estimates would appear on the concept job. The Agency representative can then agree to this cost by fix pricing it, or if they disagree then they can either cancel it or speak to the FM Service Provider for further information.
5. Once a job stage has been fixed priced by the Agency representative the next job stage can be created and released by the Agency representative i.e. the Concept stage will be followed by the Design and Documentation stage which is then followed by the Tender stage.
6. Once all three job stages have been fixed priced then the top job can be fixed priced. It is also at this point when variations can be raised if required.

Note: No Consultancy jobs can be created against a SC top job or its subsequent job stages.

Requesting Small Construction Works

To **request** small construction works in FAMIS, complete the following steps:

1. Select an Asset from the Asset List pane.
2. Select the Work Request tab. (**Note:** A new form will be displayed in the *Display* window).
3. Complete the applicable fields from the Work Request tab. Available fields may differ depending on business requirements:

The screenshot shows the FAMIS 'Work Request' form. On the left is a 'Closed Assets' pane with a list of assets including Trinity Gardens, Troitt Park, and Tumby Bay Area. A red box with the text 'Select an Asset from the Asset List' points to this pane. The main form area has tabs for 'Welcome', 'Budget', 'Schedules', 'Work Request' (selected), 'Agreement', 'Job Tracking', 'Approvals', 'Job History', 'Job Billing', 'Invoicing', 'Asset List', 'Tax Invoice', and 'Reject'. The 'Work Request' tab contains fields for 'Payment Details' (Customer: DEC0000 - DEPT OF EDUCATION AND CHILD, Local Id: 0799, Agency Ref, General Ref), 'Type' (SMALL CONSTRUCTION), 'Work Option', 'Cost Category', 'Account Code', 'Estimated Cost' (\$0), 'Fixed Price' (\$0), 'Work Category' (SMALL CONSTRUCTION), 'Planned Start Date' (Friday, 24 July 2015), and 'Planned Finish Date' (Thursday, 23 July 2015). A red box with the text 'Complete the applicable fields' points to these input fields. At the bottom of the form are buttons for 'Save As Default', 'Release', 'Hold', and 'Cancel'. A red box with the text 'Click the Release button' points to the 'Release' button.

Requesting Small Construction Works

- a) Agency Ref and General Ref are optional fields and may be used by the Agency to assist in further differentiating requested work appearing on invoices.
- b) Select Small Construction from the Job Type drop down list. (**Note:** System defaults to Breakdown Maintenance). You will notice that you do not need to select Planned as all Small Construction Works are planned.
- c) Enter descriptive details (brief of requirements; agency risk assessment; and indicative budget) regarding the work request in the Work Description field. (**Note:** this field is limited to 160 characters)
- d) Select the relevant cost category from the Cost Category dropdown list.
- e) Select the relevant Account Code (if applicable) from the Account Code dropdown list.
- f) Enter a value in the Estimated Cost field (between \$150,000 and \$1,000,000). The fixed price field is **read-only** for Small Construction Works jobs until all 3 job stages (concept, design and tender) have been fixed priced.
- g) Select a work category from the Work Category dropdown list.
- h) Choose the Planned Start date and the Planned Finish date using the calendar. (**Note:** Dates must be changed from the default before the button is enabled).
- i) Enter *Site Contact* name and phone number in the Contact Name and Contact Phone fields. These are optional fields
- j) Click the button to save the job to the Agreement tab.

Note: All Mandatory fields must be populated before the button is enabled. The FAMIS request will automatically advance to the Agreement tab.

Releasing Small Construction Works (from the Agreement Tab)

To **release** a small construction works in FAMIS, complete the following steps:

1. From the Agreement Tab, select small construction from the list of work types on the right, to display the Small Construction job recently created.

The screenshot shows the FAMIS Agreement Tab interface. The top navigation bar includes tabs: Welcome, Budget, Schedules, Work Request, Agreement (selected), Job Tracking, Approvals, Job History, Job Billing, Invoicing, Asset List, Tax Invoice, and Reject. Below the navigation bar is a table with columns: Action, Status, Ident, Asset, Asset Zone, Agreement Type, Work Description, Est. Cost, Fixed Price, AG Status, Agency Date, Agency User, FM Status, FM Date, and FM Use. The table contains one row with the following data: Action: Pending 14, Status: 00799 U, Asset Zone: MIN, Work Description: New Swimming Pool, Est. Cost: 400000. To the right of the table is a sidebar with a 'PENDING' dropdown menu. The dropdown menu is open, showing a list of work types: Schedules, Minor Work, Programmed Maint., Property Services, and Small Construction (selected). Below the dropdown menu are buttons: Select, RELEASE (dropdown), and Clear.

2. Ensure the **RELEASE** option is displayed in the dropdown list on the right under the **Select** button.

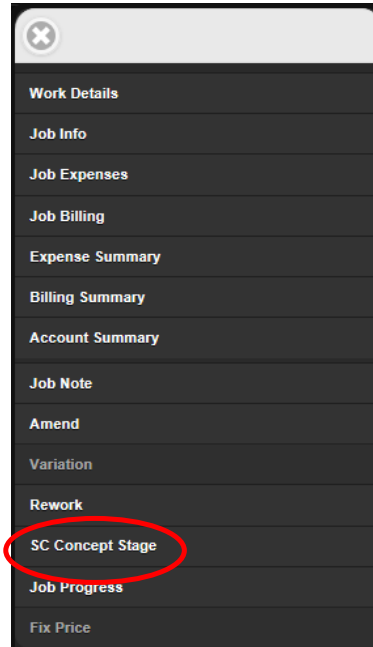
The screenshot shows the FAMIS Agreement Tab interface after the 'RELEASE' option has been selected. The table now shows the 'Action' column with a smiley face icon and the word 'RELEASED' in the first column. The 'Status' column remains 'Pending 14'. The 'RELEASE' option is now selected in the dropdown menu, and the 'Select' button is no longer visible. The 'Clear' button is still present.

3. Double click on the job to display a smiley face in the left most column and the word RELEASED in the Action column.
4. Click the **Submit** button to send this job to the FM Service Provider via the overnight job creation process.

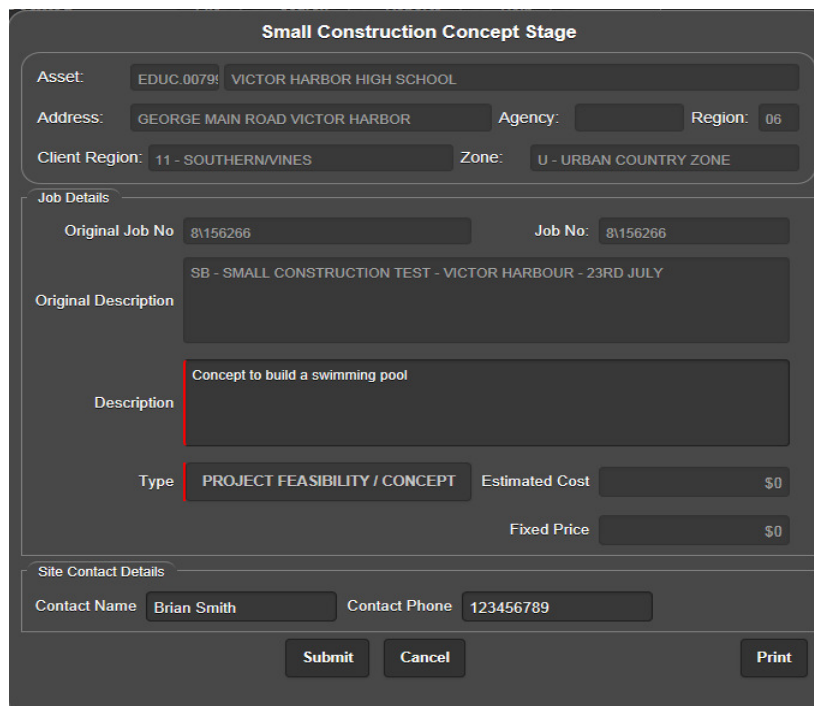
Requesting Small Construction Works

To **create and release** an **SC Concept (SC Plan)** stage in FAMIS, complete the following steps:

1. Locate the Small Construction job in the Job Tracking tab and long left click to display the job menu (see right).



2. Select the SC Concept (SC Plan) Stage quick menu option.

A screenshot of the 'Small Construction Concept Stage' form. The form is divided into several sections: 'Asset' (EDUC.0079, VICTOR HARBOR HIGH SCHOOL), 'Address' (GEORGE MAIN ROAD VICTOR HARBOR), 'Agency' (empty), 'Region' (06), 'Client Region' (11 - SOUTHERN/VINES), 'Zone' (U - URBAN COUNTRY ZONE), 'Job Details' (Original Job No: 8\156266, Job No: 8\156266, Original Description: SB - SMALL CONSTRUCTION TEST - VICTOR HARBOUR - 23RD JULY, Description: Concept to build a swimming pool, Type: PROJECT FEASIBILITY / CONCEPT, Estimated Cost: \$0, Fixed Price: \$0), and 'Site Contact Details' (Contact Name: Brian Smith, Contact Phone: 123456789). The 'Description' field is highlighted with a red border. At the bottom are 'Submit', 'Cancel', and 'Print' buttons.

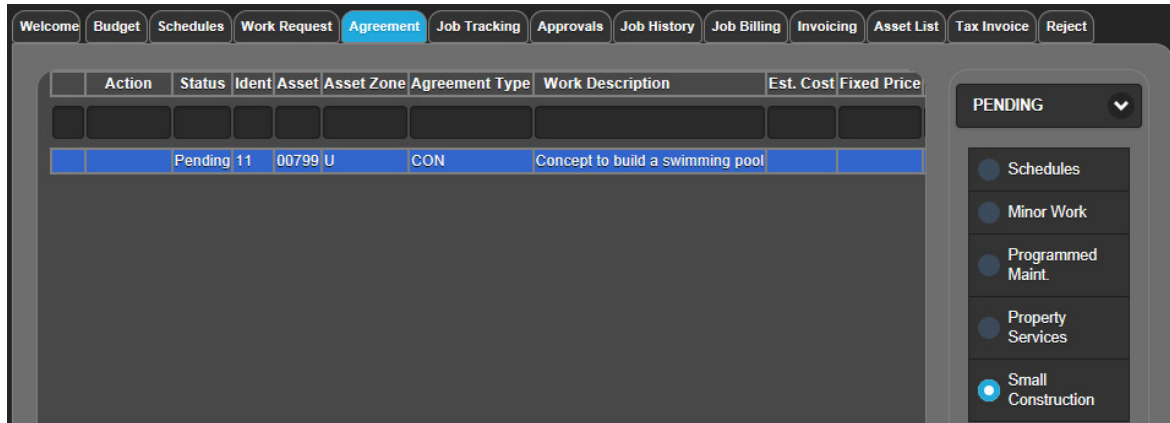
3. Complete the Description field on the form, (or leave the default description as it is) and enter in a contact name and phone number.

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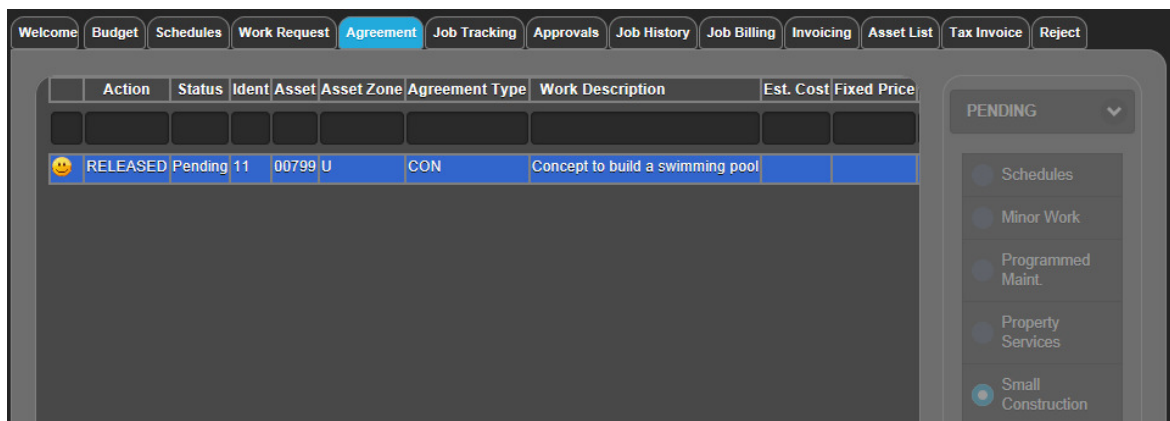
- Click the **Submit** button.

Note: All Mandatory fields must be populated before the **Submit** button is enabled. The FAMIS request will automatically advance to the Agreement tab.

- If the SC Concept Job Stage is not displaying, select the Small Construction option from the list of work types on the right.
- Click the **Select** button. The Small Construction Works Concept (SC Plan) job stage that you have just created above should be displayed.

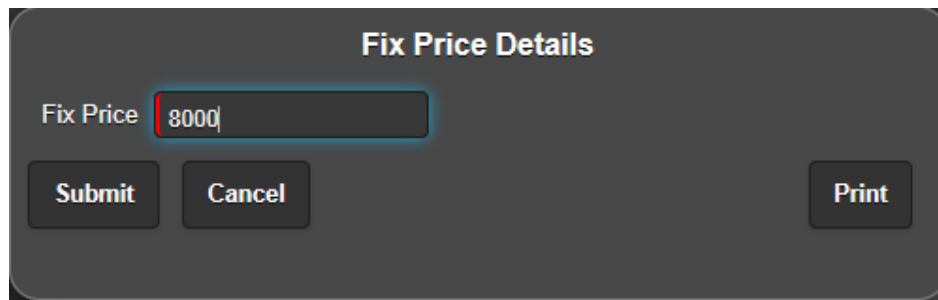


- To submit the SC Concept (SC Plan) job stage to the FM Service Provider, ensure that that the Release option is displayed on the right under the Select button.
- Double click on the job to show a smiley face in the left most column and the word RELEASED in the Action column.
- Click the **Submit** button to send this job to the FM Service Provider via the overnight job creation process.



To **Fix Price** a Concept (SC Plan) Job Stage for a small construction work job in FAMIS, complete the following steps:

1. Locate the Small Construction Works Concept stage job in the Job Tracking tab – this will appear in the lower screen (like any other sub-job such as consultancies or variations for other planned jobs).
2. Long left-click on the SC Concept Stage job and select Fix Price.
3. Enter the fixed price amount and click the **Submit** button. (**Note:** The fixed price will appear on the job the next day).

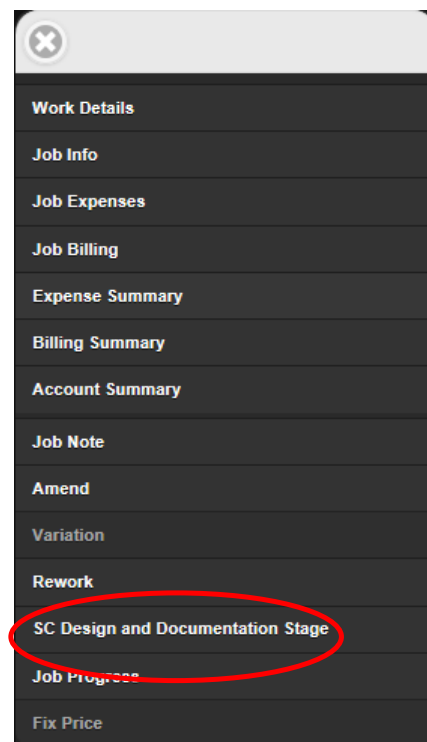


To **create and release** an SC Design and Documentation job stage in FAMIS, complete the following steps:

Once the fixed price appears on Concept job stage, a Design and Documentation job stage can be created and released.

1. To create and release a design and documentation job stage follow all the same steps as the SC Concept stage job process outlined above.

In this instance, long left click to select the SC Design and Documentation Stage option from the Job Tracking tab.



Requesting Small Construction Works

Once the Design & Documentation job stage has been fix priced by the Agency representative, a Tender Stage can be created and released following the same steps used to create the SC Concept (SC Plan) job stage process. In this instance, select the **SC Tender Stage** option from the long-left click menu window located from the Job Tracking tab.

Small Construction Tender Stage

Asset: HEAL 03054 CLARE HOSPITAL AND HEALTH SERVICES

Address: 47 FARRELL FLAT ROAD CLARE Agency: YRKNTH Region: 06

Client Region: YORKE - YORKE & NORTH Zone: U - URBAN COUNTRY ZONE

Job Details

Original Job No: 89/140040 Job No: 89/140040

Original Description: SB - SMALL CONSTRUCTION TEST - STARTED 23RD JULY

Description: Tender

Type: PROJECT TENDER Estimated Cost: \$0

Fixed Price: \$0

Site Contact Details

Contact Name: Contact Phone:

Submit Cancel Print

When all 3 job stages have been fix priced, the SC Top job can then be fixed priced by the Agency Representative.

Differences between a small construction works job and other planned work

Job Tracking tab - The 3 job stages appear at the bottom of the tab like any other sub-job such as variations and reworks

Job Ident	Remote Request ID	Note	Job Type	Job Description	Est Cost	Fixed Price	Total Fixed Price	Class	Ident	Plan Start	Plan Finish	Sched Att DT
8\156269			SC	TENDER FOR SWIMMING POOL	32000	32000	32000	P	13	24/07/2015	25/07/2015	
8\156268			SC	CD of DESIGN & DOCUMENTATION	16000	16000	16000	P	12	24/07/2015	25/07/2015	
8\156267		Y	SC	CONCEPT TO BUILD A SWIMMING POOL	8000	8000	8000	P	11	24/07/2015	25/07/2015	

Requesting Small Construction Works

Job Account Summary screen - the Job Stage information replaces where the consultancy job information is located

Job Account Summary

Asset

EDUC.00799

VICTOR HARBOR HIGH SCHOOL

Job

8156266

SB - SMALL CONSTRUCTION TEST - VICTOR HARBOUR - 23RD JULY

Job Stage

No.	Job	Description	Estimated	Fixed	Agreed	Status	Work Description
1	156267	PROJECT FEASIBILITY / CONCEPT	\$8,000.00	\$8,000.00	24/07/2015 9:27:00 AM	Active	Concept to build a swimming pool
2	156268	PROJECT DESIGN / DOCUMENTATION	\$16,000.00	\$16,000.00	24/07/2015 12:26:00 PM	Active	Design & Documentation
3	156269	PROJECT TENDER	\$32,000.00	\$32,000.00	24/07/2015 2:52:00 PM	Active	Tender for Swimming Pool

Construction

Total Estimated

Total Fixed

Agreement Date

SMALL CONSTRUCTION

\$800,000.00

\$800,000.00

23/07/2015 4:46:00 P

Job Fixed

\$800,000

Total Fixed

\$856,000

Variations

No.	Job	Description	Estimated	Fixed	Agreed	Status	Work Description
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Total Estimated

\$856,000.00

Total Fixed

\$856,000.00

Claims

No.	Adj.	Job	Claimed	Amount	Approved	Status	Paid	Invoice No.
1		156266	24/07/2015 1:31:00 PM		\$7,272.73	New		
2		156266	24/07/2015 3:27:00 PM		\$14,545.46	New		
3		156266	24/07/2015 4:14:00 PM		\$29,090.81	New		

Total Fixed

\$856,000.00

Total Claims

\$50,909.10

Balance

\$805,090.90

OK

Print