**I Obtain Project Information**

Design Services learns about projects in many different ways: from the administration, via phone call or email, or through a work request on the facilities website. No matter how a planner or project manager is notified, we need to make sure that the information is properly logged and tracked.

**a) Submit a Work Order/ Request requisition number**

**What is it?**

* A project request provides a six-digit number attached to a project description. Information includes contact name, phone number and email, building, and narrative of work scope.

**Who is involved?**

* A customer can submit a work request online. A ‘Project Request’ will come to Design and Construction Services. The request comes to Design Services and is processed to the appropriate team (Just Do It, estimate only, planning with estimating, project number only or plant fund requested).
* If a customer presents a project (in person, phone call, email) and has not submitted the request online, we can assist them in the process.

**How/Process**

* A work request can be entered on the Design Services website and [www.facilities.wayne.edu](http://www.facilities.wayne.edu).

**Checklist**

* n/a

**Timeline Considerations**

* A request that requires estimating or planning with estimating has a KPI (key performance indicator) associated with it. Estimate only requests have 10 days to be returned to the customer. Minor requests (under $25,000) with estimating must be returned to the customer within 30 days. Major requests (over $25,000) must be returned to the customer within 60 days.

**Forms**

* The only way to enter a work request is online.

**Filing**

* The six-digit number will be used for filing and tracking purposes. The request can be filed under the Planning-Estimating folder found within each building folder. Once funded, that electronic folder is moved into the ‘active’ location.

**b) Setting up a Folder- Under $25,000**

**What is it?**

* Each project has a two-part filing system: a physical folder and an electronic folder.
* A project with a value under $25,000 is kept in a long manila folder. The requisition number with building number, project name and type (Minor, Major, JDI, etc.) is written on the outside of the folder. A project sheet is taped to the front of the folder.
* The electronic folder should follow filing protocol.

**Who is involved?**

* The planner, estimator or project manager will create the folders.

**How/Process**

* The cover sheet for the manila folder is located in the ‘Estimating\_Forms’ folder under the ‘Estimating Planning’ file. Include hard copies, signed copies, etc. as needed. Folder should be a ‘quick glance’ for anyone who picks up the folder.
* The electronic filing protocol folders are located in the Toolbox. P/E/PM should create the electronic folder, copy the files out of the Toolbox and paste them in. Add in electronic files and/or scans as processed.

**Checklist** – None.

**Timeline Considerations**

* The folders should be set up as soon as the planner/estimator/project manager learns about the request.

**Forms**

* Folder Cover

**Filing**

* Folder will remain with Planner or PM for duration of project until it is time to close out. Folder will then be filed with archives.

**c) Setting up a Folder- Capital Project - Over $25,000**

**What is it?**

* Similar to above, but the project file can become very large. The hardcopy project folders are generally kept in multiple folders and/or a filing cabinet. A hangset might be necessary, depending on the project.

**Who is involved?**

* The planner or project manager will create the folder/s.

**How/Process**

* Start a binder for project with divider tabs for important information, at a minimum include: Schedule, financial summary, project contact list, RFP documents, drawings & specifications. Include hard copies, signed copies, etc. as needed. Folder should be a ‘quick glance’ for anyone who picks up the folder.
* The electronic filing protocol folders are located in the Toolbox. P/E/PM should create the electronic folder, copy the files out of the Toolbox and paste them in. Add in electronic files and/or scans as processed.

**Checklist** – None.

**Timeline Considerations**

* The folders should be set up as soon as the planner/project manager learns about the request.

**Forms** – None.

**Filing**

* Folder/s & drawing set/s will remain with PM for duration of project until it is time to close out. All documents will then be filed with archives.