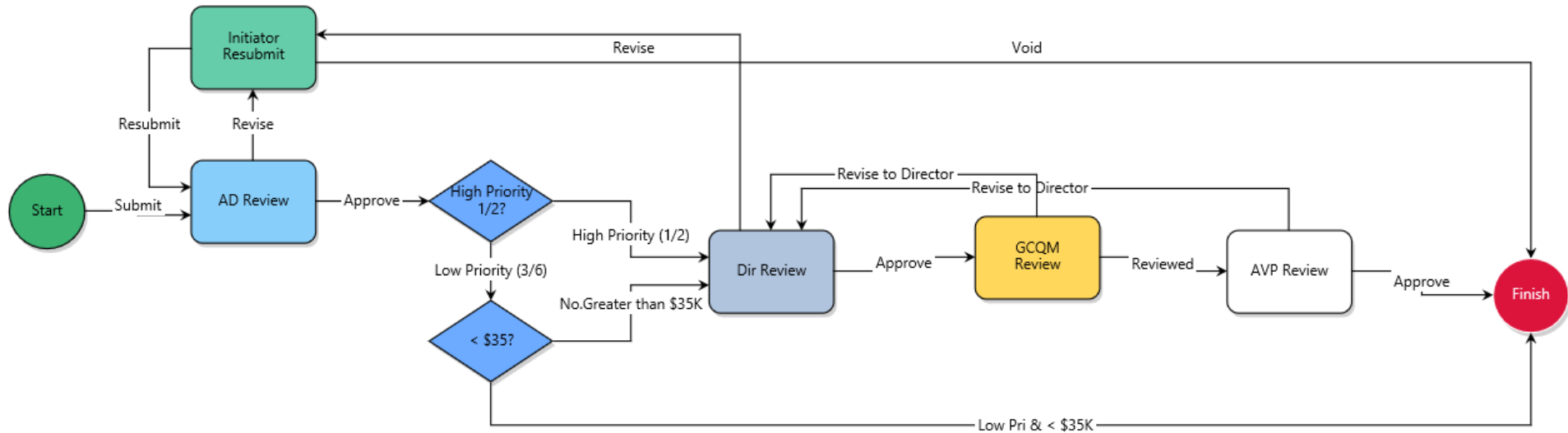




A Guide On Project Charter Process (PCP)

*Prepared by e-Builder
31 January 2018*





Process Description:

The purpose of the Project Charter process is to review and approve project requests, identify configurations in e-Builder, assign participants (staffing), identify milestones, enter and approve the initial Budget (ROM).

This process is initiated only by the Project Manager.

Process Participants:

1. Project Manager
2. Assistant Director
3. Director
4. GC Quotes Bidding Manager
5. AVP







Process Details:

1. Process is initiated by the Project Manager.
 1. Data Field Assignments on "Submit" action: e-Builder reads the value from the Assignment Expression and stores it in a process data field. For example, row 1 of the table below, e-builder reads the value from the project custom field "Project ID" and stores it the process data field "PROJECT NUMBER".
2. The Associate/Assistant Director receives and reviews the information and can take the following actions:
 1. Approved. To Conditional. Process routes to "High Priority 1/2" conditional to evaluate the priority of the project. If the priority is either Emergency or Urgent, process routes to "Director Review" step; otherwise, process routes to "<35K?" conditional to evaluate if the estimated cost of the project is less than \$35,000. If project is not an Emergency/Urgent and less than \$35,000, process completes; otherwise, process routes to "Director Review" step. Status of process: Leave Status Unchanged.
3. Initiator resubmit - Project Manager receives the workflow and make the changes required in the comments tab.
4. Director receives the workflow and reviews the information submitted by the PM and reviewed by the AD.
5. General Contractor (GC) receives the workflow and uploads the bid.
6. AVP receives and reviews the information.
7. Finish, process completes

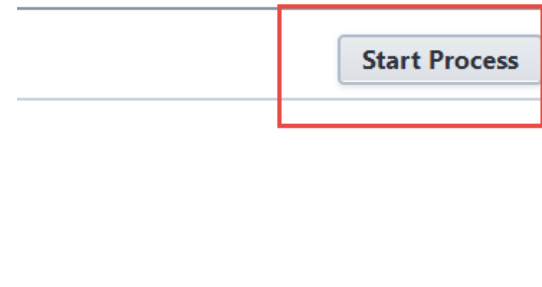
Initiation of Process:

1. Select the project you wish to start the process in
2. Select **Processes** from the Project Menu.

Project Menu

- >  Details
-  Planning
-  Forms
- >  Issues
-  **Processes** >
- >  Documents

3. Select **Start Process** in the process Module.



4. Click **Project Charter Process (PCP)** button.

Processes		Cancel
Process Name	Description	
02 - Project Charter Process (PCP)	This process is for reviewing/approving project requests, identifying configurations in e-builder, assigning participants (staff), identify milestones, entering and approving the initial budget (PCMD), etc...	

Start/Initiator Review:

1. Initiate process within specific project and read prompts

02 - Project Charter Process (PCP) All Fields View Instructions

Project:	02 - Project Charter Process	Overall Due Date:	
Process Document:	02 - Project Charter Process	Step Due Date:	
Current Workflow Step:			
* Subject:	<input type="text"/>		
Tracking Prefix:	<input type="text"/>		
Status:			

IMPORTANT!!

PROJECT INFORMATION MUST BE UP-TO-DATE

*(**Please ensure ALL information on the Project Details page is up-to-date before submitting this process**)*

Upload all pictures to the [Attached Documents] tab

2. Scroll and complete the necessary details. Required fields will have a red asterisk (*) and the process cannot be submitted until all required fields have been completed. Instructions are listed on the screen

PROJECT PRIORITY: <input type="text"/>	DATE: <input type="text"/>
PROJECT NUMBER: <input type="text"/>	PROJECT MANAGER: <input type="text"/>
ESTIMATED PROJECT TIME: <input type="text"/>	* ESTIMATED PROJECT COST: <input type="text"/>
REQUESTER NAME: <input type="text"/>	PROJECT FULLY FUNDED: <input type="text"/>
BUILDING LAGION: <input type="text"/>	FUNDING SOURCE: <input type="text"/>
PRINCIPAL INVESTIGATOR: <input type="text"/>	ACCOUNT NUMBER IF KNOWN: <input type="text"/>
DEPARTMENT: <input type="text"/>	PROJECT BUDGET (PER REQUESTERS): <input type="text"/>
BUILDING NUMBER: <input type="text"/>	MAJOR OR MINOR PROJECT: <input type="text"/>
ROOM NUMBER(S): <input type="text"/>	ESTIMATED PROJECT COST RANGE: <input type="text"/>
TYPE OF PROJECT: <input type="text"/>	RESEARCH EQUIPMENT INSIDE ROOM: <input type="text"/>
CHANGE OF SPACE TYPE(S): <input type="text"/>	RESEARCH EQUIPMENT OUTSIDE ROOMS: <input type="text"/>
CHANGE OF ROOM NUMBER(S): <input type="text"/>	HAZARDOUS MATERIALS: <input type="text"/>
CHANGE OF OCCUPANCY COUNT(S): <input type="text"/>	FURNITURE: <input type="text"/>
INCREASE OF ELECTRICAL CAPACITY: <input type="text"/>	SPACE SHARED? IF YES, DESCRIBE ABOVE: <input type="text"/>
INCREASE OF MECHANICAL CAPACITY: <input type="text"/>	PROJECT DEADLINE: <input type="text"/>

3. Select necessary companies/persons from lookup fields

PROJECT PRIORITY: <input type="text"/>	DATE: <input type="text"/>
PROJECT NUMBER: <input type="text"/>	PROJECT MANAGER: <input type="text"/>
ESTIMATED PROJECT TIME: <input type="text"/>	* ESTIMATED PROJECT COST: <input type="text"/>
REQUESTER NAME: <input type="text"/>	PROJECT FULLY FUNDED: <input type="text"/>
BUILDING LAGION: <input type="text"/>	FUNDING SOURCE: <input type="text"/>
PRINCIPAL INVESTIGATOR: <input type="text"/>	ACCOUNT NUMBER IF KNOWN: <input type="text"/>
DEPARTMENT: <input type="text"/>	PROJECT BUDGET (PER REQUESTERS): <input type="text"/>
BUILDING NUMBER: <input type="text"/>	MAJOR OR MINOR PROJECT: <input type="text"/>
ROOM NUMBER(S): <input type="text"/>	ESTIMATED PROJECT COST RANGE: <input type="text"/>
TYPE OF PROJECT: <input type="text"/>	RESEARCH EQUIPMENT INSIDE ROOM: <input type="text"/>
CHANGE OF SPACE TYPE(S): <input type="text"/>	RESEARCH EQUIPMENT OUTSIDE ROOMS: <input type="text"/>
CHANGE OF ROOM NUMBER(S): <input type="text"/>	HAZARDOUS MATERIALS: <input type="text"/>
CHANGE OF OCCUPANCY COUNT(S): <input type="text"/>	FURNITURE: <input type="text"/>
INCREASE OF ELECTRICAL CAPACITY: <input type="text"/>	SPACE SHARED? IF YES, DESCRIBE ABOVE: <input type="text"/>
INCREASE OF MECHANICAL CAPACITY: <input type="text"/>	PROJECT DEADLINE: <input type="text"/>

4. Generate and attach reports per prompts

PROJECT COST REPORT (an Approved budget must be in place before running the report, otherwise no data will appear)

Project Cost Report: To generate the Cost report, do the following:

1. Run the below report by clicking on the link
2. Check the (X) on the drop down menu to select your project (next to the (equal) (=) drop down menu)
3. Select your project from the list
4. Check the (FAC) button to run the report
5. Check the Export Report button and select into the right of the (Save) (S) button
6. Check the Download button to save the report to your computer and upload it into the PROJECT COST field below.

****REPORTED PROJECT COST****

PROJECT COST (update cost report here)

PROJECT COST:

PROJECT TIME REPORT (an Activated schedule must be in place before running the report, otherwise no data will appear)

Project Time Report: To generate the Time report, do the following:

1. Run the below report by clicking on the link
2. Check the (X) on the drop down menu (next to the (equal) (=) drop down menu)
3. Select your project from the list
4. Check the (FAC) button to run the report
5. Check the Export Report button and select into the right of the (Save) (S) button
6. Check the Download button to save the report to your computer and upload it into the PROJECT TIME field below.

****REPORTED PROJECT TIME****

PROJECT SCHEDULE (upload schedule report here)

PROJECT TIME:

5. Address permit requirements and lookup bidding information per prompts. Approvals will be automatically captured and assigned in process

NO PERMIT REQUIRED: <input type="text"/>	IF CONA PERMIT REQUIRED: <input type="text"/>
ONE PERMIT REQUIRED: <input type="text"/>	GENERATION PERMIT REQUIRED: <input type="text"/>

BIDDING/AWARD/CONSTRUCTION

1. Check Budget
2. Top 100 Best Contractors of the Industry List in the Company List
3. Check the (FAC) button
4. Check the (S) button

CONTRACTOR NAME	STATUS	CONTRACTOR NAME	STATUS
CONTRACTOR NAME	<input type="text"/>	CONTRACTOR NAME	<input type="text"/>
CONTRACTOR NAME	<input type="text"/>	CONTRACTOR NAME	<input type="text"/>
CONTRACTOR NAME	<input type="text"/>	CONTRACTOR NAME	<input type="text"/>
CONTRACTOR NAME	<input type="text"/>	CONTRACTOR NAME	<input type="text"/>
CONTRACTOR NAME	<input type="text"/>	CONTRACTOR NAME	<input type="text"/>
CONTRACTOR NAME	<input type="text"/>	CONTRACTOR NAME	<input type="text"/>
CONTRACTOR NAME	<input type="text"/>	CONTRACTOR NAME	<input type="text"/>
CONTRACTOR NAME	<input type="text"/>	CONTRACTOR NAME	<input type="text"/>
CONTRACTOR NAME	<input type="text"/>	CONTRACTOR NAME	<input type="text"/>

APPROVAL

PERMIT RECOMMENDATION	PERMITTING USER
ASSOCIATE DIRECTOR APPROVAL	ASSOCIATE DIRECTOR APPROVAL DATE
DIRECTOR APPROVAL	DIRECTOR APPROVAL DATE
USER APPROVAL	USER APPROVAL DATE
APR APPROVAL	APR APPROVAL DATE

AD Review:

1. Filter process instances by project and select desire instance

Filter Instances Cancel

Status: Draft Open Finished

Step Name:

Containing Text:

Filter

Project: Show All Page 1 of 1 Show 25 Delete Instance

Project	Process	Subject	Status	Step	In Step Since	Date Created	Created By
<input type="checkbox"/> Classroom Seating	PCP - J	Project Charter for Classroom Seating Priority 3 - Expedite (education/improvements) Project Cost 24000	Submitted	Final	01/30/2018	01/30/2018 08:53AM	Chandra Mohan, Vijayesh

2. Review information as-needed. Most fields will be read-only

Pictures are located under the (Attached Document) tab, if applicable.

PROJECT PRIORITY:	DATE
PROJECT NUMBER:	PROJECT MANAGER:
ESTIMATED PROJECT TIME:	ESTIMATED PROJECT COST:
REQUESTER NAME:	PROJECT FULLY FUNDED:
BUILDING HAISSON:	FUNDING SOURCE:
PRINCIPAL INVESTIGATOR:	ACCOUNT NUMBER (IF KNOWN):
DEPARTMENT:	PROJECT BUDGET (PER REQUESTER):
BUILDING NUMBER:	MAJOR OR MINOR PROJECT:
ROOM NUMBERS:	ESTIMATED PROJECT COST RANGE:
TYPE OF PROJECT:	RESEARCH EQUIPMENT INSIDE ROOM:
CHANGE OF SPACE TYPES:	RESEARCH EQUIPMENT OUTSIDE ROOM:
CHANGE OF ROOM NUMBERS:	HAZARDOUS MATERIALS:

3. Select necessary companies/persons from lookup fields

PROJECT PRIORITY:

PROJECT NUMBER:

ESTIMATED PROJECT TIME:

REQUESTER NAME:

BUILDING HAISSON:

PRINCIPAL INVESTIGATOR:

DEPARTMENT:

BUILDING NUMBER:

ROOM NUMBERS:

TYPE OF PROJECT:

CHANGE OF SPACE TYPES:

CHANGE OF ROOM NUMBERS:

CHANGE OF OCCUPANCY COUNTS:

INCREASE OF ELECTRICAL CAPACITY:

INCREASE OF MECHANICAL CAPACITY:

PROJECT MANAGER:

ESTIMATED PROJECT COST:

PROJECT FULLY FUNDED:

FUNDING SOURCE:

ACCOUNT NUMBER (IF KNOWN):

PROJECT BUDGET (PER REQUESTER):

MAJOR OR MINOR PROJECT:

ESTIMATED PROJECT COST RANGE:

RESEARCH EQUIPMENT INSIDE ROOM:

RESEARCH EQUIPMENT OUTSIDE ROOM:

HAZARDOUS MATERIALS:

FURNITURE:

SPACE SHARED IF YES, ESSENCIAL ABOVE:

PROJECT DEADLINE:

4. Generate and attach reports per prompts

PROJECT COST REPORT (an Approved budget must be in place before running the report, otherwise no data will appear)

To generate the Cost report, do the following:

- Run the below report by clicking on the link
- Click the OK on the drop down menu to select your project (next to the (equal) (=) drop down menu)
- Select your project from the list
- Click the (OK) button to run the report
- Click the Export Report button and select into the right of the (Save) (Save) link
- Click the Download button to save the report to your computer and upload it into the PROJECT COST field below.

****REPORTED PROJECT COST****

PROJECT COST (update cost report here)

PROJECT COST:

PROJECT TIME REPORT (an Activated schedule must be in place before running the report, otherwise no data will appear)

To generate the Time report, do the following:

- Run the below report by clicking on the link
- Click the OK on the drop down menu (next to the (equal) (=) drop down menu)
- Select your project from the list
- Click the (OK) button to run the report
- Click the Export Report button and select into the right of the (Save) (Save) link
- Click the Download button to save the report to your computer and upload it into the PROJECT SCHEDULE field below.

****REPORTED PROJECT TIME****

PROJECT SCHEDULE (upload schedule report here)

PROJECT TIME:

5. Address permit requirements and lookup bidding information per prompts. Approvals will be automatically captured and assigned in process

PERMITTING

NO PERMIT REQUIRED:

IF CONRA PERMIT REQUIRED:

CONRA PERMIT REQUIRED:

GENERATION PERMIT REQUIRED:

BIDDING/AWARD/CONSTRUCTION

Building Information:

- Click Bid/Link
- Click the OK on the drop down menu (next to the (equal) (=) drop down menu)
- Click the (OK) button to run the report
- Click the Export Report button and select into the right of the (Save) (Save) link
- Click the Download button to save the report to your computer and upload it into the PROJECT SCHEDULE field below.

CONTRACTOR HIRING APPROVAL:

MECHANICAL CONTRACTOR:

ELECTRICAL CONTRACTOR:

MECHANICAL CONTRACTOR:

ROOFING CONTRACTOR:

TRUCK CONTRACTOR:

TRUCK CONTRACTOR:

OTHER:

APPROVAL

PER RECOMMENDATION:

ASSOCIATE DIRECTOR APPROVAL:

DIRECTOR APPROVAL:

USER APPROVAL:

APR APPROVAL:

PER APPROVAL USER:

ASSOCIATE DIRECTOR APPROVAL USER:

DIRECTOR APPROVAL USER:

ADMIN APPROVAL USER:

APR APPROVAL USER:

Director Review:

1. Filter process instances by project and select desired instance

Filter Instances Cancel

Status: Draft Open Finished

Step Name:

Containing Text:

Filter

Project: All Projects Show All Page 1 of 1 Show 25 Delete Instance

Project	Process	Subject	Status	Step	In Step Since	Date Created	Created By
<input type="checkbox"/>	Classroom Seating	PCP - J	Submitted	Final	01.30.2018	01.30.2018 08:54AM	Chandra Mohan, Vijayesh

2. Review information as-needed. Most fields will be read-only

Pictures are located under the (Attached Document) tab, if applicable.

PROJECT PRIORITY:	DATE:
PROJECT NUMBER:	PROJECT MANAGER:
ESTIMATED PROJECT TIME:	ESTIMATED PROJECT COST:
REQUESTER NAME:	PROJECT FULLY FUNDED:
BUILDING HAIISON:	FUNDING SOURCE:
PRINCIPAL INVESTIGATOR:	ACCOUNT NUMBER (IF KNOWN):
DEPARTMENT:	PROJECT BUDGET (PER REQUESTER):
BUILDING NUMBER:	MAJOR OR MINOR PROJECT:
ROOM NUMBER(S):	ESTIMATED PROJECT COST RANGE:
TYPE OF PROJECT:	RESEARCH EQUIPMENT INSIDE ROOM:
CHANGE OF SPACE TYPE(S):	RESEARCH EQUIPMENT OUTSIDE ROOM:
CHANGE OF ROOM NUMBER(S):	HAZARDOUS MATERIALS:

3. Review project information in project details vs. project information

PROJECT INFORMATION (**Please ensure all information on the Project Details page is up to date before starting this process**)

PROJECT PRIORITY:	DATE:
PROJECT NUMBER:	PROJECT MANAGER:
ESTIMATED PROJECT TIME:	ESTIMATED PROJECT COST:
REQUESTER NAME:	PROJECT FULLY FUNDED:
BUILDING HAIISON:	FUNDING SOURCE:
PRINCIPAL INVESTIGATOR:	ACCOUNT NUMBER (IF KNOWN):
DEPARTMENT:	PROJECT BUDGET (PER REQUESTER):
BUILDING NUMBER:	MAJOR OR MINOR PROJECT:
ROOM NUMBER(S):	ESTIMATED PROJECT COST RANGE:
TYPE OF PROJECT:	RESEARCH EQUIPMENT INSIDE ROOM:
CHANGE OF SPACE TYPE(S):	RESEARCH EQUIPMENT OUTSIDE ROOM:
CHANGE OF ROOM NUMBER(S):	HAZARDOUS MATERIALS:
CHANGE OF OCCUPANCY COUNT:	FURNITURE:
INCREASE OF ELECTRICAL CAPACITY:	SPACE SHARED? IF YES, DESCRIBE ABOVE:
INCREASE OF MECHANICAL CAPACITY:	PROJECT DEADLINE:

4. Approvals will be automatically captured and assigned in process

PERMITTING

EGD PERMIT REQUIRED: OF PERMIT REQUIRED:

SPM PERMIT REQUIRED: GENERATOR PERMIT REQUIRED:

BIDDING/AWARD/CONSTRUCTION

Linking to vendors:

- Click (Linking)
- Type the Box 7 addresses of the company name in the Company box
- Click the GET LIST button
- Click on the company name of the company you identified

RECOMMENDED AWARD METHOD:	ELECTRICAL CONTRACTOR: Linking
SC UNDER BIDD CONSTRUCTION COST: Linking	MECHANICAL CONTRACTOR: Linking
SC UNDER BIDD CONSTRUCTION COST: Linking	ROOFING CONTRACTOR: Linking
CM UNDER BIDD CONSTRUCTION COST: Linking	TREE CARE CONTRACTOR: Linking
REPAIR & MAINTENANCE: Linking	TURF FIELD CONTRACTOR: Linking
LANDSCAPE CONTRACTOR: Linking	OTHER: <input type="text"/>

APPROVAL

PM RECOMMENDATION:	PM APPROVAL DATE:
ASSOCIATE DIRECTOR APPROVAL:	ASSOCIATE DIRECTOR APPROVAL DATE:
DIRECTOR APPROVAL:	DIRECTOR APPROVAL DATE:
COOP APPROVAL:	COOP APPROVAL DATE:
AUP APPROVAL:	AUP APPROVAL DATE:

GCQM Review:

1. Filter process instances by project and select desired instance

Filter Instances Cancel

Status: Draft Open Finished

Step Name:

Containing Text:

Filter

Project: All Projects Show All Page 1 of 1 Show 25 Delete Instance

Project	Process	Subject	Status	Step	In Step Since	Date Created	Created By
<input type="checkbox"/> Classroom Seating	PCP - J	Project Charter for Classroom Seating Priority 3 - Expedite (education/improvements) Project Cost 24000	Submitted	Final	01.30.2018	01.30.2018 08:54AM	Chandra Mohan, Vijayesh

2. Review information as-needed. Most fields will be read-only

Pictures are located under the (Attached Document) tab, if applicable.

PROJECT PRIORITY:	DATE:
PROJECT NUMBER:	PROJECT MANAGER:
ESTIMATED PROJECT TIME:	ESTIMATED PROJECT COST:
REQUESTER NAME:	PROJECT FULLY FUNDED:
BUILDING LIASON:	FUNDING SOURCE:
PRINCIPAL INVESTIGATOR:	ACCOUNT NUMBER (IF KNOWN):
DEPARTMENT:	PROJECT BUDGET (PER REQUESTER):
BUILDING NUMBER:	MAJOR OR MINOR PROJECT:
ROOM NUMBER(S):	ESTIMATED PROJECT COST RANGE:
TYPE OF PROJECT:	RESEARCH EQUIPMENT INSIDE ROOM:
CHANGE OF SPACE TYPE(S):	RESEARCH EQUIPMENT OUTSIDE ROOM:
CHANGE OF ROOM NUMBER(S):	HAZARDOUS MATERIALS:

3. Comments can be added/reviewed via the comments tab.

Details **Comments (0)** Attached Documents (0) Attached Processes (0) Attached Forms (0) Attached To (0)

Request Comment Comment

Private Comment

There are no comments for this process.

Request Comment Comment

Print Copy Cancel

4. Review project information in project details vs. project information

PROJECT INFORMATION (**Please ensure all information on the Project Details page is up to date before starting this process**)

PROJECT PRIORITY:	DATE:
PROJECT NUMBER:	PROJECT MANAGER:
ESTIMATED PROJECT TIME:	ESTIMATED PROJECT COST:
REQUESTER NAME:	PROJECT FULLY FUNDED:
BUILDING LIASON:	FUNDING SOURCE:
PRINCIPAL INVESTIGATOR:	ACCOUNT NUMBER (IF KNOWN):
DEPARTMENT:	PROJECT BUDGET (PER REQUESTER):
BUILDING NUMBER:	MAJOR OR MINOR PROJECT:
ROOM NUMBER(S):	ESTIMATED PROJECT COST RANGE:
TYPE OF PROJECT:	RESEARCH EQUIPMENT INSIDE ROOM:
CHANGE OF SPACE TYPE(S):	RESEARCH EQUIPMENT OUTSIDE ROOM:
CHANGE OF ROOM NUMBER(S):	HAZARDOUS MATERIALS:
CHANGE OF OCCUPANCY COUNT:	FURNITURE:
INCREASE OF ELECTRICAL CAPACITY:	SPACE SHARED? IF YES, DESCRIBE ABOVE:
INCREASE OF MECHANICAL CAPACITY:	PROJECT DEADLINE:

5. Approvals will be automatically captured and assigned in process

PERMITTING

EGG PERMIT REQUIRED: OF PERMIT REQUIRED:

SPM PERMIT REQUIRED: GENERATOR PERMIT REQUIRED:

BIDDING/AWARD/CONSTRUCTION

Linking to vendors:

- Click (Linking)
- Type the Box 7 addresses of the company name in the Company box
- Click the ENTER button
- Click on the company name of the company identified

RECOMMENDED AWARD METHOD:	ELECTRICAL CONTRACTOR: Linking
GC UNDER BIDDING CONSTRUCTION COST: Linking	MECHANICAL CONTRACTOR: Linking
GC UNDER BIDDING CONSTRUCTION COST: Linking	ROOFING CONTRACTOR: Linking
GC UNDER BIDDING CONSTRUCTION COST: Linking	TREE CARE CONTRACTOR: Linking
REPAIR & MAINTENANCE: Linking	TURF FIELD CONTRACTOR: Linking
LANDSCAPE CONTRACTOR: Linking	OTHER: <input type="text"/>

APPROVAL

PM RECOMMENDATION:	PM APPROVAL DATE:
ASSOCIATE DIRECTOR APPROVAL:	ASSOCIATE DIRECTOR APPROVAL DATE:
DIRECTOR APPROVAL:	DIRECTOR APPROVAL DATE:
CCQM APPROVAL:	CCQM APPROVAL DATE:
AUP APPROVAL:	AUP APPROVAL DATE:

AVP Review:

1. Filter process instances by project and select desired instance

Filter Instances Cancel

Status: Draft Open Finished

Step Name:

Containing Text:

Filter

Project: All Projects Show All Page 1 of 1 Show 25 Delete Instance

Project	Process	Subject	Status	Step	In Step Since	Date Created	Created By
<input type="checkbox"/> Classroom Seating	PCP - J	Project Charter for Classroom Seating Priority 3 - Expedite (education/improvements) Project Cost 24000	Submitted	Final	01.30.2018	01.30.2018 08:54AM	Chandra Mohan, Vijayesh

2. Review information as-needed. Most fields will be read-only

Pictures are located under the (Attached Document) tab, if applicable.

PROJECT PRIORITY:	DATE:
PROJECT NUMBER:	PROJECT MANAGER:
ESTIMATED PROJECT TIME:	ESTIMATED PROJECT COST:
REQUESTER NAME:	PROJECT FULLY FUNDED:
BUILDING LIASON:	FUNDING SOURCE:
PRINCIPAL INVESTIGATOR:	ACCOUNT NUMBER (IF KNOWN):
DEPARTMENT:	PROJECT BUDGET (PER REQUESTER):
BUILDING NUMBER:	MAJOR OR MINOR PROJECT:
ROOM NUMBER(S):	ESTIMATED PROJECT COST RANGE:
TYPE OF PROJECT:	RESEARCH EQUIPMENT INSIDE ROOM:
CHANGE OF SPACE TYPES:	RESEARCH EQUIPMENT OUTSIDE ROOM:
CHANGE OF ROOM NUMBERS:	HAZARDOUS MATERIALS:

3. Comments can be added/reviewed via the comments tab.

Details **Comments (0)** Attached Documents (0) Attached Processes (0) Attached Forms (0) Attached To (0)

Request Comment Comment

Private Comment

There are no comments for this process.

Request Comment Comment

Print Copy Cancel

4. Review project information in project details vs. project information

PROJECT INFORMATION (**Please ensure all information on the Project Details page is up to date before starting this process**)

PROJECT PRIORITY:	DATE:
PROJECT NUMBER:	PROJECT MANAGER:
ESTIMATED PROJECT TIME:	ESTIMATED PROJECT COST:
REQUESTER NAME:	PROJECT FULLY FUNDED:
BUILDING LIASON:	FUNDING SOURCE:
PRINCIPAL INVESTIGATOR:	ACCOUNT NUMBER (IF KNOWN):
DEPARTMENT:	PROJECT BUDGET (PER REQUESTER):
BUILDING NUMBER:	MAJOR OR MINOR PROJECT:
ROOM NUMBER(S):	ESTIMATED PROJECT COST RANGE:
TYPE OF PROJECT:	RESEARCH EQUIPMENT INSIDE ROOM:
CHANGE OF SPACE TYPES:	RESEARCH EQUIPMENT OUTSIDE ROOM:
CHANGE OF ROOM NUMBERS:	HAZARDOUS MATERIALS:
CHANGE OF OCCUPANCY COUNT:	FURNITURE:
INCREASE OF ELECTRICAL CAPACITY:	SPACE SHARED? IF YES, DESCRIBE ABOVE:
INCREASE OF MECHANICAL CAPACITY:	PROJECT DEADLINE:

5. Approvals will be automatically captured and assigned in process

PERMITTING

EGD PERMIT REQUIRED: OF PERMIT REQUIRED:

SPR PERMIT REQUIRED: GENERATOR PERMIT REQUIRED:

BIDDING/AWARD/CONSTRUCTION

Linking to items:

- Click (Linking)
- Type the Box 7 checkbox of the company name in the Company box
- Click the ENTER button
- Click on the company name of the company selected

RECOMMENDED AWARD METHOD:	ELECTRICAL CONTRACTOR: Link
GC UNDER BIDD CONSTRUCTION COST: Link	MECHANICAL CONTRACTOR: Link
GC UNDER BIDD CONSTRUCTION COST: Link	ROOFING CONTRACTOR: Link
GC UNDER BIDD CONSTRUCTION COST: Link	TREE CARE CONTRACTOR: Link
REPAIR & MAINTENANCE: Link	TURF FIELD CONTRACTOR: Link
LANDSCAPE CONTRACTOR: Link	OTHER: <input type="text"/>

APPROVAL

PM RECOMMENDATION:	PM APPROVAL DATE:
ASSOCIATE DIRECTOR APPROVAL:	ASSOCIATE DIRECTOR APPROVAL DATE:
DIRECTOR APPROVAL:	DIRECTOR APPROVAL DATE:
CCO/CM APPROVAL:	CCO/CM APPROVAL DATE:
AUP APPROVAL:	AUP APPROVAL DATE:

Finish:

1. Filter process instances by project and select desired instance

Filter Instances Cancel

Status: Draft Open Finished

Step Name:

Containing Text:

Filter

Project: All Projects Show All Page 1 of 1 Show 25 Delete Instance

Project	Process	Subject	Status	Step	In Step Since	Date Created	Created By
<input type="checkbox"/>	Classroom Seating	PCP - J	Submitted	Finish	01.30.2018	01.30.2018 08:51AM	Chandra Mohan, Vijayesh

2. Review information as-needed. Fields will be read-only

Pictures are located under the [Attached Document] tab, if applicable.

PROJECT PRIORITY:	DATE:
PROJECT NUMBER:	PROJECT MANAGER:
ESTIMATED PROJECT TIME:	ESTIMATED PROJECT COST:
REQUESTER NAME:	PROJECT FULLY FUNDED:
BUILDING ID/ISSN:	FUNDING SOURCE:
PRINCIPAL INVESTIGATOR:	ACCOUNT NUMBER (IF KNOWN):
DEPARTMENT:	PROJECT BUDGET (PER REQUESTER):
BUILDING NUMBER:	MAJOR OR MINOR PROJECT:
ROOM NUMBER(S):	ESTIMATED PROJECT COST RANGE:
TYPE OF PROJECT:	RESEARCH EQUIPMENT INSIDE ROOM:
CHANGE OF SPACE TYPE(S):	RESEARCH EQUIPMENT OUTSIDE ROOM:
CHANGE OF ROOM NUMBER(S):	HAZARDOUS MATERIALS:

3. Comments can be reviewed via the comments tab.

Details **Comments (0)** Attached Documents (2) Attached Processes (0) Attached Forms (0) Attached To (0)

Private Comment Request Comment Comment

There are no comments for this process.

Request Comment Comment

Print Copy Cancel

4. Approvals will be listed

PERMITTING

ECD PERMIT REQUIRED Please select an option... DT FORMS PERMIT REQUIRED Please select an option...
 UFM PERMIT REQUIRED Please select an option... UNIFORM PERMIT REQUIRED Please select an option...

BIDDING/AWARD/CONSTRUCTION

Bidding Summary:

- Click (Bids)
- Type the Bid # (Business of the company name in the Company list)
- Click the Bid ID button.
- Click on the company name of the company awarded

RECOMMENDED AWARD METHOD: Please select an option...

<input type="checkbox"/> GC UNDER BIDDING CONSTRUCTION COST: Link <input type="checkbox"/> GC UNDER BIDDING CONSTRUCTION COST: Link <input type="checkbox"/> CM UNDER BIDDING CONSTRUCTION COST: Link <input type="checkbox"/> REPAIR & MAINTENANCE: Link <input type="checkbox"/> LANDSCAPE CONTRACTOR: Link	<input type="checkbox"/> ELECTRICAL CONTRACTOR: Link <input type="checkbox"/> MECHANICAL CONTRACTOR: Link <input type="checkbox"/> ROOFING CONTRACTOR: Link <input type="checkbox"/> TREE CARE CONTRACTOR: Link <input type="checkbox"/> TURF FIELD CONTRACTOR: Link <input type="checkbox"/> OTHER: <input type="text"/>
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APPROVAL

PM RECOMMENDATION ASSOCIATE DIRECTOR APPROVAL DIRECTOR APPROVAL GC/CM APPROVAL AWP APPROVAL	PM APPROVAL DATE ASSOCIATE DIRECTOR APPROVAL DATE DIRECTOR APPROVAL DATE GC/CM APPROVAL DATE AWP APPROVAL DATE
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Project:	Classroom Seating 1		
Process Document:	PCP - 3 Show History Current Actors 2		Overall Due Date: 6
Current Workflow Step:	Finish Show Workflow Diagram 3		Step Due Date: 7
Subject:	Project Charter for Classroom Seating Priority 3 - Expedite 4 (education/improvements) Project Cost 24000		
Status:	Submitted 5		

Process Description:

Each time you open a process to perform your function within a project, you will see the Process Header. The process header contains information that can help you identify where you are within a process, within a project.

1. **Project:** Project Name
2. **Process Document:** The process instance
 - [Show History](#): Will display a historical list of actions taken within this process instance
 - [Current Actors](#): Will display a list of actors responsible for the process in its current step
3. **Current Workflow Step:** The name of the current step
 - [Show Workflow Diagram](#): Will display the workflow diagram, highlighting the current step where this instance is with a blue frame
4. **Subject:** Displays the specific process instance subject
5. **Status:** Displays the process' current status
6. **Overall Due Date:** Date the process needs to be completed by *(If applicable)*
7. **Step Due Date:** Date this step in the process needs to be completed by *(If applicable)*

Support:

Announcements ▾

To contact e-Builder Support
Please call (888) 288-5717 or email support@e-builder.net. Thank you!

Notes and Comments: