# A Guide On

## Project Request (PRP) Process

*Prepared by e-Builder*
*31 January 2018*

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Reject/Void

Approved by All → **AVP Review** → Approved → **Project Admin Assign AD** → Reviewed → **AD Assign PM** → Assigned → **Project Admin Create Shell & Number** → Created → **PM Acknowledge Assigned Project** → Acknowledged → **Finish**

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## Process Description:

The purpose of the Project Request process is to enable personnel from various university departments to

request a Facilities project to add or modify property under their responsibility. This process is accessible by a

Public data entry form that does not require an e-Builder user license. The request is vetted by an internal

Facilities committee and several staff specialists. If the project is approved, the Project Administrator sets up a

new e-Builder project to track the concept development and subsequent design/construction. By using this

process, the Facilities staff and university departments will be able to track, manage, and report all proposed

projects.

This process will launch from a special project called "Project Requests Repository". The eB Admin is the

primary initiator of the process.

## Process Participants:

1. UCF Employee or eB User
2. Project Administrator
3. Dean
4. Building Manager
5. Client
6. Stakeholder
7. SPAA
8. Project Administrator
9. Account Supervisor
10. FSBO Support
11. Director
12. Assistant Vice President
13. Assistant Director
14. Project Manager

## Process Details:

1. Process is initiated by any employee through the Public Process, OR by any user who has access to the Project Requests Repository project inside e-Builder.

2. Project Admin adds Dean and Building Manager to Next Step.

   1. To selected actor using the "SNA Code Step 1". Upon completion of this code, process routes automatically to conditional "Code Step Check 1". If code ran successfully, the process routes to "Client Stakeholder Verification" step; otherwise, process routes back to "Project Administrator Route" step

3. Clients and Stakeholders Verify and Electronically Approve Request.

4. SPAA Request Reviewer Reviews Projects and Sends for approval.

5. Project # assigned and the funding availability is confirmed with the requester.

6. Account Supervisor Provides Funding information or issues to FSBO Support to Provide Funding Information.

7. FSBO Support Provides Funding information.

8. All Directors review the Project Request for State Fire Marshall review, electrical load calculations, & infrastructure capacity.

9. AVP Reviews Project Request and Approves.

10. Assistant Director will Assign the PM to the Project.

11. Project Admin creates the Project Shell in e-Builder and the Project Number in PS.

12. Project Manager Acknowledges that they have been assigned to the project and the Shell is complete.
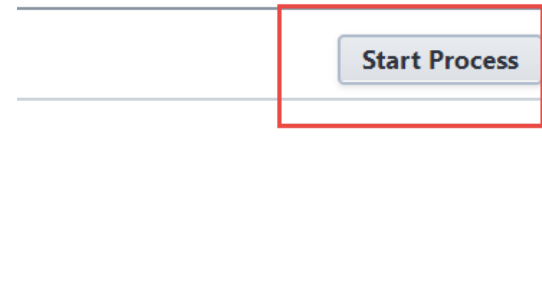
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## Initiation of Process:

1. Select the Project Request Repository project to start the process

2. Select **Processes** from the Project Menu.

**Project Menu**
- Details
- Planning
- Forms
- Issues
- **Processes**
- Documents
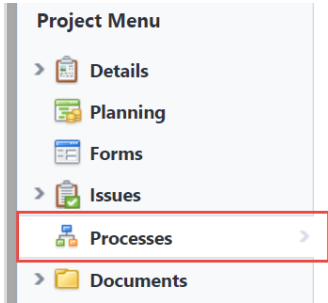
3. **Or visit the public link: https://app.e-builder.net/public/publicLanding.aspx?QS=7dbbbc472813424c9a26d3cd036e6316**

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

**Start Process**

4. Click **Project Request (PRP)** button.

| 01 - Project Request (PRP) | This is a Public Process (available to non-eBuilder users) used for requesting new projects. This version will contain updated fields and field dependencies, replacing the original |

## Initiator Input:

1. Initiate process via public link or in the Project Request Repository project.



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



3. Dynamic grid allows multiple rows to be added account number and dollars.

4. Checklists require toggle

5. Questions are answered at bottom of screen



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## Project Admin Review:

1. Click process name to open Project Request process.



2. Scroll to review 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.



3. A majority of fields will become read only. Comments may be added under the comments tab or other fields may be completed if possible.

4. Select participants at bottom of screen.

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## Client Stake Holder Review:

1. Click process name to open Project Request process.



2. Review comments by selecting the **Comments** tab.



3. 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.

4. Other fields are to-be reviewed



5. Add comments regard project request in dynamic grid



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## SPAA, eB Admin, Dir, AVP Review:

1. Click process name to open Project Request process.



2. Most fields are read only, review information:



3. Add comments regard project request in dynamic grid



4. Review comments by selecting the **Comments** tab.

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## All Directors Review:

1. Click process name to open Project Request process.



2. Most fields are read only, review information:



3. Add comments regard project request in dynamic grid



4. Review comments by selecting the **Comments** tab.

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## AD Assign PM Review:

1. Click process name to open Project Request process.



2. Most fields are read only, review information:



3. Add comments regard project request in dynamic grid



4. Client participants are listed



5. Review comments by selecting the **Comments** tab.



6. Assign project manager by filling in name.

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## Project Admin Create Project:

1. Click process name to open Project Request process.



2. Most fields are read only, review information:



3. Project Admin must create project and enter information below:



3. Add comments regard project request in dynamic grid



4. Client participants are listed



5. Review comments by selecting the **Comments** tab.



6. Assign project manager by filling in name.

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## Final Review/Finish:

1. Click process name to open Project Request process.



2. Most fields are read only, review information:



3. Project Admin entered project info:



4. Client participants are listed



5. Review comments by selecting the **Comments** tab.



6. Assigned project manager is listed:

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## 01 - Project Request (PRP) - 1

[Delete Instance] [Workflow Override] [All Fields View] [Instructions]

[Print] [Copy] [Cancel]

| | | | |
|---|---|---|---|
| Project: | Project Requests Repository (1) | Overall Due Date: (6) | |
| Process Document: | PRP - 1 (2) Show History | Current Actors | Step Due Date: (7) | |
| Current Workflow Step: | Finish  Show Workflow Diagram (3) | | |
| Subject: | Electrical upgrade (specialized equipment use),Finish upgrade,HVAC upgrade,Lab upgrade,Life Safety,Lighting improvement | Requested by: James Ross | Estimated Value: $0 (4) | | |
| Status: | Approved (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)*

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**Notes and Comments:**

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