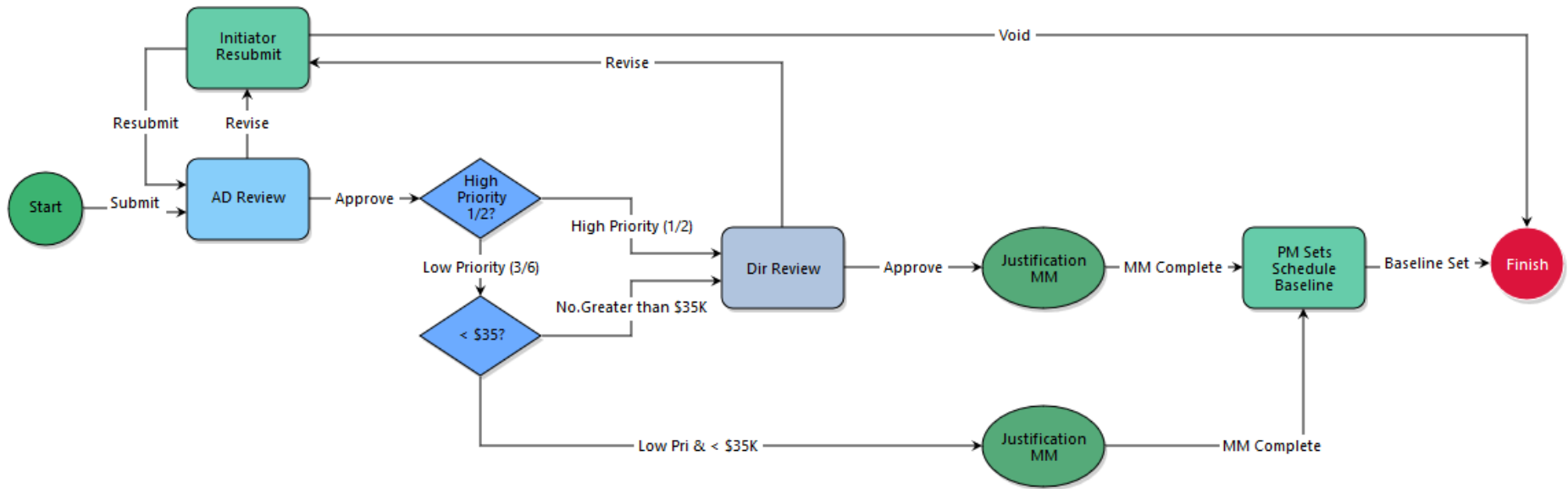




A Guide On Project Charter Process (PCP)

*Prepared by UCF / e-Builder
10 February 2022*



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







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. Finish, process completes

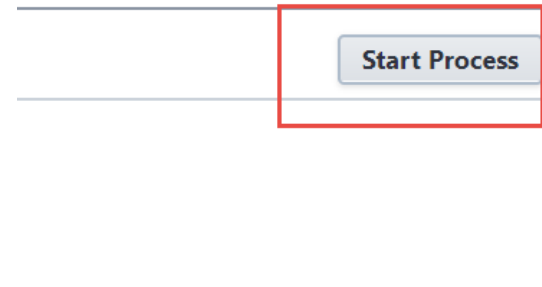
Initiation of Process:

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 (staffing), identify milestones, entering and approving the initial budget (ICM), 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: | | 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 Information

| | | | |
|-------------------|--|-------------------------|--|
| PROJECT PRIORITY: | | DATE: | |
| PROJECT NUMBER: | | PROJECT MANAGER: | |
| REQUESTER NAME: | | PROJECT DESCRIPTION: | |
| BUILDING LIAISON: | | PRINCIPAL INVESTIGATOR: | |
| BUILDING NUMBER: | | DEPARTMENT: | |
| ROOM NUMBER(S): | | | |

Permitting

| | | | |
|------------------------|-------------------------------|------------------------------|-------------------------------|
| * BCO PERMIT REQUIRED: | -- Please select an option -- | * ST JOHNS PERMIT REQUIRED: | -- Please select an option -- |
| * SFM PERMIT REQUIRED: | -- Please select an option -- | * GENERATOR PERMIT REQUIRED: | -- Please select an option -- |

Design Information

| | | | |
|---|-------------------------------|---------------------------------|-------------------------------|
| * DESIGN TEAM REQUIRED: | -- Please select an option -- | * UMPC REQUIRED: | -- Please select an option -- |
| * ELECTRICAL PANEL EVALUATION: | -- Please select an option -- | * HVAC EVALUATION: | -- Please select an option -- |
| * FIRE PENETRATIONS INSPECTIONS REQUIRED: | -- Please select an option -- | * COMMISSIONING AGENT REQUIRED: | -- Please select an option -- |
| * LEED REQUIRED: | -- Please select an option -- | | |

3. Select necessary companies/persons from lookup fields

Proposed Professional Service Firms

[Lookup] instructions - Click [Lookup] - Type the first 3 characters of the company name in the Company box - Click the FILTER button - Click on the company name of the company identified

| | | | |
|--------------------|----------|-----------------------|----------|
| ARCHITECT: | [lookup] | CIVIL ENGINEER: | [lookup] |
| MEP ENGINEER: | [lookup] | LANDSCAPE ARCHITECT: | [lookup] |
| BUILDING ENVELOPE: | [lookup] | THRESHOLD INSPECTION: | [lookup] |

3. Enter estimated project cost. The total will calculate when submitted.

Estimated Project Cost

| | |
|--|----------------------|
| Design Estimate: | 0.00 |
| Construction Estimate: | 0.00 |
| Permitting (BCO / SFM): | 0.00 |
| OIR Estimate: | 0.00 |
| UCFIT Estimate: | 0.00 |
| Testing and Inspection Estimate: | 0.00 |
| UES Cx / Commissioning: | 0.00 |
| F & S Work Order Estimate: | 0.00 |
| Other Estimate: | 0.00 |
| Other Description: | <input type="text"/> |
| Contingency Estimate: | 0.00 |
| FP&C Professional Management Services: | 0.00 |

The total will populate once you advance the process.

TOTAL PROJECT COST:

4. Generate and attach reports per prompts

Project Schedule

(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 holding CTRL and clicking on the link to open it in a new tab
2. Click the [x] on the drop down menu (next to the [Equal To] drop down menu)
3. Select your project from the list
4. Click the [OK] button to run the report
5. Click the Export Report button (to the right of the blue floppy disk)
6. Click the Download button to save the report to be uploaded into the field below.

****REPORTED PROJECT SCHEDULE****

* PROJECT TIME: or

Confirmation Statement

* BUDGET AND SCHEDULE CONFIRMATION: Project Manager has confirmed that the rough cost and schedule included in this project charter has been discussed with and agreed upon by the end client.

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

Contractor Selection

[Lookup] instructions - Click [Lookup] - Type the first 3 characters of the company name in the Company box - Click the FILTER button - Click on the company name of the company identified

For a list of justification descriptions to be used as PM reference, click here.

| | | | |
|------------------------------------|----------------------|----------------------------------|----------|
| GC UNDER \$500K CONSTRUCTION COST: | [lookup] | GC UNDER \$4M CONSTRUCTION COST: | [lookup] |
| CM UNDER \$4M CONSTRUCTION COST: | [lookup] | REPAIR & MAINTENANCE: | [lookup] |
| ELECTRICAL CONTRACTOR: | [lookup] | MECHANICAL CONTRACTOR: | [lookup] |
| LANDSCAPE CONTRACTOR: | [lookup] | TREE CARE CONTRACTOR: | [lookup] |
| ROOFING CONTRACTOR: | [lookup] | TURF FIELD CONTRACTOR: | [lookup] |
| OTHER: | <input type="text"/> | | |

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: 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 - 3 | Submitted | Finish | 01.30.2018 | 01.30.2018 08:51AM | Chandra Mohan, Vignesh |

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

Project Information

| | |
|-------------------|-------------------------|
| PROJECT PRIORITY: | DATE: |
| PROJECT NUMBER: | PROJECT MANAGER: |
| REQUESTER NAME: | PROJECT DESCRIPTION: |
| BUILDING LIAISON: | PRINCIPAL INVESTIGATOR: |
| BUILDING NUMBER: | DEPARTMENT: |
| ROOM NUMBER(S): | |

Permitting

| | |
|----------------------|----------------------------|
| BCO PERMIT REQUIRED: | ST JOHNS PERMIT REQUIRED: |
| SFM PERMIT REQUIRED: | GENERATOR PERMIT REQUIRED: |

Design Information

| | |
|---|-------------------------------|
| DESIGN TEAM REQUIRED: | UMPC REQUIRED: |
| ELECTRICAL PANEL EVALUATION: | HVAC EVALUATION: |
| FIRE PENETRATIONS INSPECTIONS REQUIRED: | COMMISSIONING AGENT REQUIRED: |
| LEED REQUIRED: | |

Proposed Professional Service Firms

[Lookup] instructions - Click [Lookup] - Type the first 3 characters of the company name in the Company box - Click the FILTER button - Click on the company name of the company identified

| | |
|--------------------|-----------------------|
| ARCHITECT: | CIVIL ENGINEER: |
| MEP ENGINEER: | LANDSCAPE ARCHITECT: |
| BUILDING ENVELOPE: | THRESHOLD INSPECTION: |

Estimated Project Cost

| | |
|--|------|
| Design Estimate: | 0.00 |
| Construction Estimate: | 0.00 |
| Permitting (BCO / SFM): | 0.00 |
| OIR Estimate: | 0.00 |
| UCFIT Estimate: | 0.00 |
| Testing and Inspection Estimate: | 0.00 |
| UES Cx / Commissioning: | 0.00 |
| F & S Work Order Estimate: | 0.00 |
| Other Estimate: | 0.00 |
| Other Description: | 0.00 |
| Contingency Estimate: | 0.00 |
| FP&C Professional Management Services: | 0.00 |

The total will populate once you advance the process.

TOTAL PROJECT COST:

Project Schedule

(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 holding CTRL and clicking on the link to open it in a new tab
2. Click the [v] on the drop down menu (next to the [Equal To] drop down menu)
3. Select your project from the list
4. Click the [OK] button to run the report
5. Click the Export Report button (to the right of the blue floppy disk)
6. Click the Download button to save the report to be uploaded into the field below.

****REPORTED PROJECT SCHEDULE****

PROJECT TIME:

Confirmation Statement

BUDGET AND SCHEDULE CONFIRMATION:

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

Contractor Selection

[Lookup] instructions - Click [Lookup] - Type the first 3 characters of the company name in the Company box - Click the FILTER button - Click on the company name of the company identified

For a list of justification descriptions to be used as PM reference, click here.

| | |
|------------------------------------|----------------------------------|
| GC UNDER \$500K CONSTRUCTION COST: | GC UNDER \$4M CONSTRUCTION COST: |
| CM UNDER \$4M CONSTRUCTION COST: | REPAIR & MAINTENANCE: |
| ELECTRICAL CONTRACTOR: | MECHANICAL CONTRACTOR: |
| LANDSCAPE CONTRACTOR: | TREE CARE CONTRACTOR: |
| ROOFING CONTRACTOR: | TURF FIELD CONTRACTOR: |
| OTHER: | |

Justification

RECOMMENDED AWARD METHOD:

RECOMMENDATION OF AWARD:

REASONING FOR RECOMMENDED AWARD METHOD:

Director Review:

1. Filter process instances by project and select desire 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 - 3 | Submitted | Finish | 01.30.2018 | 01.30.2018 08:51AM | Chandra Mohan, Vignesh |

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

Project Information

| | |
|-------------------|-------------------------|
| PROJECT PRIORITY: | DATE: |
| PROJECT NUMBER: | PROJECT MANAGER: |
| REQUESTER NAME: | PROJECT DESCRIPTION: |
| BUILDING LIAISON: | PRINCIPAL INVESTIGATOR: |
| BUILDING NUMBER: | DEPARTMENT: |
| ROOM NUMBER(S): | |

Permitting

| | |
|----------------------|----------------------------|
| BCO PERMIT REQUIRED: | ST JOHNS PERMIT REQUIRED: |
| SFM PERMIT REQUIRED: | GENERATOR PERMIT REQUIRED: |

Design Information

| | |
|---|-------------------------------|
| DESIGN TEAM REQUIRED: | UMPC REQUIRED: |
| ELECTRICAL PANEL EVALUATION: | HVAC EVALUATION: |
| FIRE PENETRATIONS INSPECTIONS REQUIRED: | COMMISSIONING AGENT REQUIRED: |
| LEED REQUIRED: | |

Proposed Professional Service Firms

[Lookup] instructions - Click [Lookup] - Type the first 3 characters of the company name in the Company box - Click the FILTER button - Click on the company name of the company identified

| | |
|--------------------|-----------------------|
| ARCHITECT: | CIVIL ENGINEER: |
| MEP ENGINEER: | LANDSCAPE ARCHITECT: |
| BUILDING ENVELOPE: | THRESHOLD INSPECTION: |

Estimated Project Cost

| | |
|--|------|
| Design Estimate: | 0.00 |
| Construction Estimate: | 0.00 |
| Permitting (BCO / SFM): | 0.00 |
| OIR Estimate: | 0.00 |
| UCFIT Estimate: | 0.00 |
| Testing and Inspection Estimate: | 0.00 |
| UES Cx / Commissioning: | 0.00 |
| F & S Work Order Estimate: | 0.00 |
| Other Estimate: | 0.00 |
| Other Description: | |
| Contingency Estimate: | 0.00 |
| FP&C Professional Management Services: | 0.00 |

The total will populate once you advance the process.

TOTAL PROJECT COST:

Project Schedule

(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 holding CTRL and clicking on the link to open it in a new tab
2. Click the [v] on the drop down menu (next to the [Equal To] drop down menu)
3. Select your project from the list
4. Click the [OK] button to run the report
5. Click the Export Report button (to the right of the blue floppy disk)
6. Click the Download button to save the report to be uploaded into the field below.

****REPORTED PROJECT SCHEDULE****

PROJECT TIME:

Confirmation Statement

BUDGET AND SCHEDULE CONFIRMATION:

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

Contractor Selection

[Lookup] instructions - Click [Lookup] - Type the first 3 characters of the company name in the Company box - Click the FILTER button - Click on the company name of the company identified

For a list of justification descriptions to be used as PM reference, click here.

| | |
|------------------------------------|----------------------------------|
| GC UNDER \$500K CONSTRUCTION COST: | GC UNDER \$4M CONSTRUCTION COST: |
| CM UNDER \$4M CONSTRUCTION COST: | REPAIR & MAINTENANCE: |
| ELECTRICAL CONTRACTOR: | MECHANICAL CONTRACTOR: |
| LANDSCAPE CONTRACTOR: | TREE CARE CONTRACTOR: |
| ROOFING CONTRACTOR: | TURF FIELD CONTRACTOR: |
| OTHER: | |

Justification

RECOMMENDED AWARD METHOD:

RECOMMENDATION OF AWARD:

REASONING FOR RECOMMENDED AWARD METHOD:

PM Sets Baseline Schedule:

1. The PM shall go to the project's Schedule module and set the baseline project schedule.

Baseline Schedule Reminder

Now that the charter has been approved, PMs need to go into the Schedule module for this project and set the baseline for the schedule. Go do this, then select Baseline Set above to confirm that this has been done.

Finish:

1. Filter process instances by project and select desire 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 - 3 | Submitted | Finish | 01.30.2018 | 01.30.2018 08:51AM | Chandra Mohan, Vignesh |

2. Review information as-needed. All fields will be read-only. Approvals will be listed.

Project Information

| | | | |
|-------------------|--|-------------------------|--|
| PROJECT PRIORITY: | | DATE: | |
| PROJECT NUMBER: | | PROJECT MANAGER: | |
| REQUESTER NAME: | | PROJECT DESCRIPTION: | |
| BUILDING LIAISON: | | PRINCIPAL INVESTIGATOR: | |
| BUILDING NUMBER: | | DEPARTMENT: | |
| ROOM NUMBER(S): | | | |

Permitting

| | | | |
|----------------------|--|----------------------------|--|
| BCO PERMIT REQUIRED: | | ST JOHNS PERMIT REQUIRED: | |
| SFM PERMIT REQUIRED: | | GENERATOR PERMIT REQUIRED: | |

Design Information

| | | | |
|---|--|-------------------------------|--|
| DESIGN TEAM REQUIRED: | | UMPC REQUIRED: | |
| ELECTRICAL PANEL EVALUATION: | | HVAC EVALUATION: | |
| FIRE PENETRATIONS INSPECTIONS REQUIRED: | | COMMISSIONING AGENT REQUIRED: | |
| LEED REQUIRED: | | | |

Proposed Professional Service Firms

[Lookup] instructions - Click [Lookup] - Type the first 3 characters of the company name in the Company box - Click the FILTER button - Click on the company name of the company identified

| | | | |
|--------------------|--|-----------------------|--|
| ARCHITECT: | | CIVIL ENGINEER: | |
| MEP ENGINEER: | | LANDSCAPE ARCHITECT: | |
| BUILDING ENVELOPE: | | THRESHOLD INSPECTION: | |

Estimated Project Cost

| | |
|--|------|
| Design Estimate: | 0.00 |
| Construction Estimate: | 0.00 |
| Permitting (BCO / SFM): | 0.00 |
| OIR Estimate: | 0.00 |
| UCFIT Estimate: | 0.00 |
| Testing and Inspection Estimate: | 0.00 |
| UES Cx / Commissioning: | 0.00 |
| F & S Work Order Estimate: | 0.00 |
| Other Estimate: | 0.00 |
| Other Description: | 0.00 |
| Contingency Estimate: | 0.00 |
| FP&C Professional Management Services: | 0.00 |

The total will populate once you advance the process.

TOTAL PROJECT COST:

Project Schedule

(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 holding CTRL and clicking on the link to open it in a new tab
2. Click the [v] on the drop down menu (next to the [Equal To] drop down menu)
3. Select your project from the list
4. Click the [OK] button to run the report
5. Click the Export Report button (to the right of the blue floppy disk)
6. Click the Download button to save the report to be uploaded into the field below.

****REPORTED PROJECT SCHEDULE****

PROJECT TIME:

Confirmation Statement

BUDGET AND SCHEDULE CONFIRMATION:

Contractor Selection

[Lookup] instructions - Click [Lookup] - Type the first 3 characters of the company name in the Company box - Click the FILTER button - Click on the company name of the company identified

For a list of justification descriptions to be used as PM reference, click here.

| | | | |
|------------------------------------|--|----------------------------------|--|
| GC UNDER \$500K CONSTRUCTION COST: | | GC UNDER \$4M CONSTRUCTION COST: | |
| CM UNDER \$4M CONSTRUCTION COST: | | REPAIR & MAINTENANCE: | |
| ELECTRICAL CONTRACTOR: | | MECHANICAL CONTRACTOR: | |
| LANDSCAPE CONTRACTOR: | | TREE CARE CONTRACTOR: | |
| ROOFING CONTRACTOR: | | TURF FIELD CONTRACTOR: | |
| OTHER: | | | |

Justification

RECOMMENDED AWARD METHOD:

RECOMMENDATION OF AWARD:

REASONING FOR RECOMMENDED AWARD METHOD:

Approval

| | | | |
|------------------------------|--|-----------------------------------|--|
| PM RECOMMENDATION: | | PM APPROVAL DATE: | |
| ASSOCIATE DIRECTOR APPROVAL: | | ASSOCIATE DIRECTOR APPROVAL DATE: | |
| DIRECTOR APPROVAL: | | DIRECTOR APPROVAL DATE: | |

| | | | |
|------------------------|--|----------------------------|--|
| 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:

Training Resources

Please visit the FP&C website for a variety of e-Builder training resources both in print and video.

<http://fp.ucf.edu/resources/ebuilder/>

Need e-Builder Help?

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

For UCF Project Support

e-Builder System Admins can be reached at eBuilderadmin@ucf.edu

Notes and Comments: