Project Charter Process Narrative



Purpose

The purpose of the Project Charter process is to understand, summarize, and present key project information in a concise manner, which will be reviewed and prioritized by FP&C Leadership, or returned for revision. During development of the Project Charter, the PM will review project information, including any Notes or Documents supplied with the project, and verify/identify the correct Requesting Entity and establish a positive relationship with the client. The PM will also develop a basic Project Scope, determine if a design professional is required, if any permitting will be required, create an initial Project Budget and Project Schedule, recommend a Delivery Method for the work, and confirm the funding source(s) for the project.

Initiator

The Project Charter process is initiated by the Project Manager (PM). The PM can start developing the Project Charter after they have acknowledged the project request in eBuilder.

Project Charter	A set of information containing estimates for Project Cost and Project Schedule, as well as Delivery Method, developed by the PM after meeting with project requestor, walking the site, and reaching an agreement on the Project Scope.
Project Charter Process	The eBuilder process the PM initiates after inputting estimated information into the Cost and Schedule modules and selecting a Delivery Method. The process requires the Manager, Facilities Planning (MGR) and/or Director to review and approve.
Project Requestor	Individual who submits a Minor Project Request Form.
Campus Client (CC)	Ongoing Point of Contact for the Minor Project for the Requesting Entity.
Requesting Entity	Entity requesting the Minor Project such as a College, Department, Office, or Auxiliary.
Delivery Method	Method describing how the Contractor for the project will be selected. Delivery Methods consist of Competitive Bid (eB Quotes), Direct Selection, and Rotation.

Key Terms

Key Steps

Start: Project Review - PM Reviews Project Details and attached documentation in eBuilder

Step1: Initial Interaction - PM initiates communication with Project Requestor

Step2: In-Person Meeting/Site Visit

Step2A (Optional): AE Site Visit and Budget Input

Step3: Develop Budget Estimate

Step3A: FP&C Assistant Director Approves Budget

Step4: Develop Project Schedule

Step5: Determine Delivery Method

Step6: Confirm Funding Source(s)

Step7: Create Project Charter

Finish: Management Approves or Rejects Charter

Project Review

The starting point of the Project Charter is the review of a newly assigned and acknowledged project. Before reaching out to the listed CC, the PM reviews information listed in the Project Details section of the eBuilder project, as well as reviewing any documents that were attached. If the PM has any questions about the information, they can reach out to the Construction Project Coordinator for clarification.

Initial Interaction

After the Project Review has been performed, the PM should be equipped with quality information. The PM calls the CC to:

- Introduce themselves and advise that they are the PM assigned to the (Project Name)
- Provide their contact information and the Project Number to the CC
- Verify if the CC is the correct Point of Contact for the project, and if there are any other individuals the CC would like include in project communications
- Discuss the project and determine if the CC has any expectations around the project cost or completion time frame
- Determine if the CC is available for an in-person meeting/site visit (in almost all cases this is advisable)
- Add notes from this interaction in eBuilder to memorialize the discussion
- Add any additional personnel requested during the call to the Project Participants list
- Schedule the in-person meeting/site visit with the appropriate individual(s) as discussed

In-Person Meeting/Site Visit

In most cases the PM should arrange a site visit with the CC where they can:

- Meet with the CC to present the project scope based on the original Project Details and initial conversation
- Gather additional information including an observation of existing site conditions
- Re-confirm the project scope, and advise the POC on next steps
- Notes from this meeting should be entered into eBuilder as soon as practicable

Develop Budget Estimate

(see Project Charter Budget Narrative)

- Design Professional will be Required YES/NO
 - YES
 - AE selected to participate in project
 - PM meets with AE to walk site and get rough estimates of job costs
 - NO
 - PM uses prior experience to determine cost estimates
- e-Builder Cost Module Create Budget Estimate
 - PM should use Budget Template, then delete non-applicable line items
 - PM enters estimated values into applicable budget line items based on information gathered and/or prior experience
 - Once all budget values have been input, PM selects Submit Budget to move the project budget into the Assistant Directors court for approval
 - eBuilder saves information continuously in the Cost module so there is no need to save work as you go

 Develop a Project Schedule
 (see Project Charter Schedule Narrative)

- e-Builder Schedule Module Create Schedule
 - A schedule template will be applied by the Project Assistant before assigning the project to the Project Manager
 - Depending on project scope, remove any non-applicable schedule tasks
 - Review Predecessors to ensure all are properly synced templates include predecessor relationships already. If the PM adds any new tasks, they must set these relationships manually.
 - Review Construction Time to ensure that it matches client and realistic expectations
 - Save a snapshot of the completed schedule

Determine Delivery Method

- Based on client need / project timeline, and <u>award policy</u>, PM should select the appropriate Delivery Method for Continuing Service Contractors
 - In-house completion (Typically an FO Work Order)
 - Completion by a single trade
 - Completion by more than one trade with UCF oversight
 - Completion by Job Order Contractor (JOC)
 - Completion by a licensed General Contractor (GC)
 - Completion by a licensed Construction Manager (CM)
 - Completion by a Design Builder
- Projects less than \$35K
 - PM will create a Statement of Work (SOW)
 - Rotation
 - o Job Order Contract
- Projects over \$35K awarded to General Contractors
 - PM will create a Statement of Work (SOW)
 - $\circ \quad \text{Job Order Contract}$
 - o E-B Quotes
 - o Direct Selection with Justification
- Projects over 35K awarded to Construction Managers
 - PM will create a Statement of Work (SOW)
 - \circ Justification

Confirm Funding Source(s)

- Discuss with the client how the project will be funded, noting that the budget estimate may change depending on various factors, and identify the accounts from which funding will be pulled
 - E&G Education & General
 - o C&G Contracts & Grants
 - AUX Auxiliary Funds
 - OTHER

Create the Project Charter

The following how to guide has been developed for the PM to reference as they initiate the 02 – Project Charter process in e-Builder.

How to guide – The Project Charter

Header	Project Name, Number, and Subject
PROJECT INFORMATION	General information about the project
DESIGN	Used only if the project requires design professionals
DESIGN	Select recommended design professionals as applicable
PROJECT COST REPORT	Requires approved project cost/budget
PROJECT COST	PM uploads project cost report here
PROJECT TIME REPORT	Requires completed project schedule to execute
PROJECT SCHEDULE	PM uploads project schedule here
PERMITTING	Captures anticipated permitting requirements
	Select Delivery Method and provide recommendation logic
BIDDING/AWARD/CONSTRUCTION	Select recommended vendors for each activity as applicable
APPROVAL	Records approval actions of PM, MGR, and Director

The e-Builder Project Charter is comprised of the following sections:

Before initiating the Project Charter process, the PM should complete the below pre-requisites:

- 1. Review comments in the Project Details Notes tab for information added during the Project Request Process
- 2. Review all documents contained in the Project Details Documents tab for any documents added during the Project Request Process
- 3. Meet with the requester and any relevant partner departments to develop a basic scope
- 4. In the e-Builder Cost Module, create the Project Budget
- 5. In the e-Builder Schedule Module, create a Project Schedule

Once all pre-requisites are completed, access e-Builder and select the Projects menu tab.

From the e-Builder Projects screen

Dashboard Proje	ects Planning Fi	orms Processes Documents Calendar	Contacts Bi	dding Cost S	chedula	ports Setup ***		Switch to Cl		203 -
	Projects	Dinis Processes Documents Calendar	contacts bi	dung Cost 3	chedule 14	ports Setup				Hidde
. •	All Active Projects	Edit Add View						end user		
ilable Now	1 2 3 4 5	► H						Project ID Number 2018-007	Project Name End User Training Project 07	
AREHOUSE	Project ID Number •	Project Name	Project Manager	UCF Building Number	Project Type	UCF Building Name	Department			
arn more	15004002.1	15004002.1 Renovate former elec rm for a flume channel	Christopher Harris	0004	Minor	STORM WATER RESEARCH LAB	College of Engineering and	50		
	15020002	15020002 TAF Renovation and HVAC Upgrade	Ben Fauser	0020	Minor	BIOLOGICAL SCIENCES BUILDING	Office of Research			
	15045002	15045002 Replace fire alarm system	Christopher Harris	0045	Minor	BUSINESS ADMINISTRATION I	Business Administration			
	15154003	15154003 NEXTROM FABRICATION MACHINE INSTALLATION	Trey Beck	0154	Minor	MAE LABORATORY	CREOL - Optics & Photonics			
	15ZN3006	15ZN3006 Redesign curb and inlet - Pegasus Circle	Evan Shick	0045	Minor	BUSINESS ADMINISTRATION I	Business Administration, Fac Energy Services	12		
	16054009	16054009 College of Sciences Bidg RM 107	Michael Berrios	0054	Minor	COLLEGE OF SCIENCES BUILDING	UCF IT			Ac
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	16101001	16101001 Nike 101 Door Lock Upgrades	Trey Beck	0101	Minor	NIKE BUILDING 101	Housing			Ac
	16102001	16102001 Nike 102 Door Lock Upgrades	Trey Beck	0102	Minor	NIKE BUILDING 102	Housing			Ac
	16103001	16103001 Nike 103 Door Look Upgrades	Trey Beck	0103	Minor	NIKE BUILDING 103	Housing			Act

• Search for and select the project for which you with to initiate the 02-Project Charter Process

From the Project Menu

	lder.net/da2/Projects/ProjectDetails.aspx?PortalID={aa	
* Information Techno 🕄 Kronos	📓 RESET NID PASSW 🔇 Finance & Accounti 🌘	COAA - Home S Linked In Learning
e-Builder®	Q	
Home Dashboard Proje	ects Planning Forms Processes Docu	uments Calendar Contacts Bidding Cost Schedule Reports Setup ***
UNIVERSITY OF X	Project Details For 2018-007 - End User Training Project	×07 ▼
Recent Pages	Details	
Project Menu	Project Name	End User Training Project 07
Details	e-Builder Project Administrator	Mason , Samantha eBAdmin
Project Participants	Project Status	Administrative
Sent Items	(view map) Address	3528 N Perseus Loop, 16A Orlando, FL 32816
Planning Forms	Country	USA
lssues	Start Date	02.19.2018
• Processes	Target Date	07.19.2018
Documents	Description	Training Project 7
Schedule	Project Webcam	http://www.surveygizmo.com/s3/4204658/UCF-End-User-Training
Contacts	Last Modified By	Mason, Samantha eBAdmin
💼 Calendar	Date Last Modified	12.12.2019
 Bidding Submittals 	Custom Fields (55) Notes (0) Documents (0) Forms (0) Pr	rocesses (0) Settings
Webcam	J. B. H. H.	
	Project Value:	\$500K-\$2M

• Select the Processes link

From the Processes screen

 ← → ♂ ① ① ■ appa-builder.net/dsi2/Processes/ProjectProcesses.appr/PortalID=(as5c56a7-9a4c-4ef5-a28b.3f1e7169630c) ★ Information Retina. ③ Toross @ RESET NID PASSW						
e-Builder 😂	Q.	Switch to Classic style	5058203 - 🧀 🖷 ?			
Home Dashboard Pr	ojects Planning Forms Processes Doc	iments Calendar Contacts Bidding Cost Schedule Reports Setup ***				
UNIVERSITY OF X	Processes for 2018-007 - End User Training Project 07	v	Unfinished Drafts			
Recent Pages						
Project Menu	Search In	◎ Processes initiated by Me ◎ Processes in My Court ● All Processes				
> 🏥 Details	Type of Process	All Processes				
Planning	Status	All Statuses				
Forms	Containing Text					
Issues Processes						
> 🕒 Documents			Filter			

• Select the Start Process button

From the Start a Process pop-up window

app.e-builder.net/da2/processes/SelectProc e-Builder® A TRIMBLE COMPANY	cess.aspx?PortallD={aa5c56a7-9a4c-4ef5-a28b-3f1e7169630c}	?
tart a process on End User Training		
rocesses Process Name	Cano	ei
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 (ROM), etc.	
03 - Vendor Selection Bid Review (BIDVS)	This process is for reviewing and approving the winning bid/vendor and encompass bidding/GS quotes, rotation, and justification.	
04 - Drawing & Design Plan Review (DDPR)	Drawing and design plan review process.	
05 - Commitment Approval (CA)	This process is for creating and approving commitments in e-Builder.	
05 - Minor Project Proposal (MPP)	This process is used to obtain funding from a Client to move forward with Design and/or construction.	
06 - Potential Change Order (PCO)	This process is for receiving potential change orders (Addendum & Add Services). This process will be used in conjunction with the Change Order (CO) process for bundling multiple PCOs into a single CO.	
07AS -Additional Service (AS)	This process is used for projects where the A/E is under contract typically for Major projects.	
07B - Commitment Transfer Process (CTP)	This process is used to execute the following transfers: Line to Line Buyout Savings Contractor Contingency/Buyout Saving Use	s

• Select the 02 – Project Charter Process (PCP) link

From the 02 – Project Charter Process (PCP) screen – PROJECT INFORMATION section

	IMPOR PROJECT INFORMATIO (**Please ensure ALL information on the Project Detai Upload all pictures to the	N MUST BE UP-TO-DATE	this process**
PROJECT PRIORITY:		DATE	
PROJECT NUMBER:		PROJECT MANAGER:	
ESTIMATED PROJECT TIME:		PROJECT DESCRIPTION:	
REQUESTER NAME:		* ESTIMATED PROJECT COST:	
BUILDING LIAISON:		PROJECT FULLY FUNDED?:	Please select an option
PRINCIPAL INVESTIGATOR:		FUNDING SOURCE	Please select an option 💌
DEPARTMENT:		MAJOR OR MINOR PROJECT?:	Please select an option V
BUILDING NUMBER:		ESTIMATED PROJECT COST RANGE	Please select an option V
ROOM NUMBER(S):		RESEARCH EQUIPMENT INSIDE ROOM?:	Please select an option T
TYPE OF PROJECT:	Please select an option	RESEARCH EQUIPMENT OUTSIDE ROOM?:	Please select an option T
CHANGE OF SPACE TYPES?:	Please select an option 🔻	HAZARDOUS MATERIALS?:	Piease select an option *
CHANGE OF ROOM NUMBERS7:	Please select an option V	FURNITURE?:	Please select an option T
CHANGE OF OCCUPANCY COUNT?:	Please select an option	SPACE SHARED? IF YES, DESCRIBE ABOVE:	Please select an option V
INCREASE OF ELECTRICAL CAPACITY?:		PROJECT DEADLINE:	
INCREASE OF MECHANICAL CAPACITY?:	Please select an option T		

- Input ESTIMATED PROJECT TIME as a whole integer indicating the months from planning to close-out
- Input ESTIMATED PROJECT COST in whole dollars
- Select TYPE OF PROJECT dropdown menu

Please select an option	Ŧ
Please select an option	
NEW BUILDING	
ADDITION	
RENOVATION	
EXTERIOR ONLY	
OTHER	

- Select the option that best describes your project
- Select the CHANGE OF SPACE TYPES dropdown menu

Please select an option
Please select an option
YES
NO
UNKNOWN

• Select the applicable option

•

• Select the CHANGE OF ROOM NUMBERS dropdown menu



o Select the applicable option

•

Select the CHANGE OF OCCUPANCY COUNT dropdown menu

Please select an option	•
Please select an option	
YES	
мо	
UNKNOWN	

- Select the applicable option
- Select the INCREASE OF MECHANICAL CAPACITY dropdown menu

Please select an option 🔻
Please select an option
YES
NO
UNKNOWN

- o Select the applicable option
- Select the PROJECT FULLY FUNDED dropdown menu



- o Select the applicable option
- Select the FUNDING SOURCE dropdown menu



- o Select the applicable option
 - E&G Education & General

- C&G Contracts & Grants
- AUX Funds from Auxiliary organizations
- OTHER Technology Fee, Donations, etc
- Select the MAJOR OR MINOR PROJECT dropdown menu

Please select an option	•
Please select an option	
MAJOR >\$2M	
MINOR <\$2M	

- Select the applicable option
- Select the ESTIMATED PROJECT COST RANGE dropdown menu

Please select an option		
UNDER \$10K		
\$10K - \$20K		
\$20K - \$30K		
\$30K - \$40K		
\$40K - \$50K		
\$50K - \$500K		
\$500K - \$1M		
\$1M - \$2M		
DVER \$2M		

- o Select the range which corresponds to your ESTIMATED PROJECT COST
- Select the RESEARCH EQUIPMENT INSIDE ROOM dropdown menu

Please select an option	T
Please select an option	
YES	
NO	
UNKNOWN	

- \circ Select the applicable option
- Select the HAZARDOUS MATERIALS dropdown menu

Please select an option	•
Please select an option	
YES	
NO	
UNKNOWN	

• Select the FURNITURE dropdown menu

Please select an option		
/ES		
NO		

• Select the applicable option

•

Select the SPACE SHARED? IF YES, DESCRIBE ABOVE dropdown menu

Please select an option 🔻
Please select an option
YES
NO
UNKNOWN

- \circ Select the applicable option
- \circ $\;$ Notes on shared space are entered in the PROJECT DESCRIPTION $\;$
- Select the calendar icon next to the PROJECT DEADLINE field
 - \circ Select the date you expect the project to close out according to the Project Schedule

DESIGN			
[Lookup] instructions			
Click [Lookup] Zype 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			
DESIGN TEAM REQUIRED?:	Please select an option 🔻	UMPC REQUIRED:	Please select an option ¥
ARCHITECT:	[Lookup]	LEED REQUIRED:	
MEP ENGINEER:	[Lookup]	SCHEMATIC DESIGN REQUIRED:	Please select an option T
CIVIL ENGINEER:	[Lookup]	DESIGN DEVELOPMENT REQUIRED:	Please select an option V
LANDSCAPE ARCHITECT:	[Lookup]	50% CONSTRUCTION DOCUMENTS REQUIRED:	Please select an option *
BUILDING ENVELOPE:	[Lookup]	100% CONSTRUCTION DOCUMENTS REQUIRED:	Please select an option
THRESHOLD INSPECTION:	[Lookup]	WORKSHOPS REQUIRED:	Please select an option *
FIRE ALARM:	[Lookup]	CRITICAL NEEDS CHECKLIST REQUIRED:	Please select an option T
ELECTRICAL PANEL EVALUATION:	Please select an option V	HVAC EVALUATION:	Please select an option 🔻
FIRE PENETRATIONS INSPECTIONS REQUIRED:	Please select an option V	COMMISSIONING AGENT REQUIRED:	Please select an option V
JUSTIFICATION DRUNNATION	Torthane Joan D / U A 新春葉書篇《使使旧旧名》		

From the 02 – Project Charter Process (PCP) screen – DESIGN section

• Select the DESIGN TEAM REQUIRED dropdown menu

Please select an option	¥
Please select an option	
YES	
NO	
UNKNOWN	

- Select the applicable option
- If YES is selected, complete the applicable information in the section. If NO, or UNKNOWN is selected, continue to the PROJECT COST REPORT section.
- Select the [Lookup] link next to any design professional category for which you wish to recommend a vendor

e-Builder®				1 6 19
Lookup Company Filter Companies				Clear
Company:	brph	Company Custom Fields:	Select a custom	field v
City:		State:		Lookup
Area Code:		County:		Lookup
Zip Proximity:	Within 50 miles of	Project Companies Only:		
Construction Codes:				Lookup 🚯
				Filter
Companies (Click on company	name to view the details)			Cancel
Company Name-	(City St	tate	Phone
BRPH Architects-Engineers Inc	P	Melbourne FL		

- Search for a specific design professional you wish to recommend
 - o Input the name or a partial name into the Company field
 - Select the Filter button

e-Builder®					6♥?
ookup Company					
Filter Companies					Clear
Company:			Company Custom Fields:	Select a custom field Select a custom field	
City:			State:	Continuing Service Category	kup
Area Code:			County:		kup
Zip Proximity:	Within 50 miles of		Project Companies Only:	License Expiration Date	
Construction Codes:				Lookup 🚯	
					Filter
Companies (Click on company	name to view the details)				Cancel
Company Name-		City	State	Phone	
	There ar	e no companies	s for this selection		
					Cancel

- Search for a category of vendors to select from
 - o Select the Company Custom Fields dropdown menu
 - Select Continuing Service Category

e-Builder®			.4	ب ې
Lookup Company Filter Companies				Cle
Company:		Company Custom Fields:	Continuing Service Category V Lookup	
City:		State:	Looku	р
Area Code:		County:	Looku	р
Zip Proximity:	Within 50 miles of	Project Companies Only:		
Construction Codes:			Lookup 🧃	
				Filter
Companies (Click on company	name to view the details)			Can
Company Name	Ci	ty State	Phone	
	There are no	o companies for this selection		
				Can

• Select the Lookup button underneath the field displaying Continuing Service Category

From the Lookup pop-up window

C= A TRI	
Look	up (Select the values to add below) Insert Selected Cancel
•	Value
V	Architect
	Building Automation Systems
	Building Envelope
	Building Envelope Contractor
	Civil Engineer
	Commissioning
	Electrical

- Select the checkbox next to the Value you wish to filter by
- Select the Insert Selected button

e-Builder®						i∎ ♥ ?
Lookup Company						
Filter Companies						Clear
Company:		Company Cust	om Fields:	Continuing Se Architect	Vice Category Lookup]
City;			State:		Lo	okup
Area Code:			County:		Lo	okup
Zip Proximity:	Within 50 miles of	Project Compa	nies Only:			
Construction Codes:					Lookup 🕕	
						Filter
Companies (Click on company n	ame to view the details)					Cancel
Company Name-		City	State	Ρ	hone	
AECOM Technical Services Inc		Los Angeles	CA			
BRPH Architects-Engineers Inc		Melbourne	FL			
C.T. Hsu + Associates, P.A.		Orlando	FL	(4	07) 423-0098	

- Select the Filter button
- Select your recommended vendor from the results

DESIGN			
[Lookup] instructions			
1. Ciki (lookup) 2. Type the first 2 data states of the company name in the Company box 3. Cikic the FLITER botton 4. Click on the company name of the company identified			
Parlow Town Regulation	10	UMPC REQUIRED:	Please select an option
ARCHITECT:	BRPH Architects-Engineers Inc (Change) (Pamove)	LEED REQUIRED:	
MEP ENGINEER:	[Lookup]	SCHEMATIC DESIGN REQUIRED:	Please select an option 🔻
CIVIL ENGINEER:	[Lookup]	DESIGN DEVELOPMENT REQUIRED:	Please select an option 🔻
LANDSCAPE ARCHITECT:	[Lookup]	50% CONSTRUCTION DOCUMENTS REQUIRED:	Please select an option 🔻
BUILDING ENVELOPE:	[Lookup]	00% CONSTRUCTION DOCUMENTS REQUIRED:	Please select an option 🔻
THRESHOLD INSPECTION:	[Lookup]	WORKSHOPS REQUIRED:	Please select an option 🔻
FIRE ALARM:	[Lookup]	CRITICAL NEEDS CHECKLIST REQUIRED:	Please select an option V
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
JUSTIFICATION EPULANATION			

From the 02 - Project Charter Process (PCP) screen - DESIGN section

- You will see your selected design professional displayed
- Repeat this process for any other design professionals you wish to recommend
- Select the ELECTRICAL PANEL EVALUATION dropdown menu

Please select an option	T
Please select an option	
YES	
NO	
UNKNOWN	

- \circ Select the applicable option
- Select the FIRE PENETRATIONS INSPECTIONS REQUIRED dropdown menu

Please select an option	,
Please select an option	
YES	
NO	
UNKNOWN	

• Input why you are recommending the design professional(s) in the JUSTIFICATION EXPLANATION text field



- It can be helpful to create and save statements for a number of common reasons in a separate file, from which you can then copy and paste a prepared statement into this field, modifying the statement verbiage if needed
- Select the UMPC REQUIRED dropdown menu

Please select an option	T)
Please select an option	
YES	
NO	
UNKNOWN	

- o Select the applicable option
- Select the SCHEMATIC DESIGN REQUIRED dropdown menu

Please select an option	Ŧ
Please select an option	
YES	
NO	
UNKNOWN	

- o Select the applicable option
- Select the DESIGN DEVELOPMENT REQUIRED dropdown menu



- Select the applicable option
- Select the 50% CONSTRUCTION DOCUMENTS REQUIRED dropdown menu

Please select an option 🔻		
Please select an option		
YES		
NO		
UNKNOWN		

• Select the 100% CONSTRUCTION DOCUMENTS REQUIRED dropdown menu



- o Select the applicable option
- Select the WORKSHOPS REQUIRED dropdown menu

Please select an option 🔻
Please select an option
YES
NO
UNKNOWN

- Select the applicable option
- Select the CRITICAL NEEDS CHECKLIST REQUIRED dropdown menu

Please select an option 🔻
Please select an option
YES
NO
UNKNOWN

- \circ Select the applicable option
- Select the HVAC EVALUATION dropdown menu



- Select the applicable option
- Select the COMMISSIONING REQUIRED dropdown menu

Please select an option 🔻		
Please select an option		
YES		
NO		
UNKNOWN		

From the 02 – Project Charter process (PCP) screen

e-Builder S	né 🕸 ?		
Start Process	Print Copy Check Spelling Show Workflow Submit Save Draft Delete Draft Cancel		
Project:	End User Training Project 07		
Project Number:	2016-007		
Process:	02 - Project Charter Process		
* Subject:	Project Charter for End User Training Project (0) Priority (Project Cost ()		
Details Attached Documents (b) Attached Processes (b) Attached Forms (b)			

- Select the Save Draft button
 - It is critical to save your work here as the next step of the process will cause you to navigate away from this page --- all unsaved work will be lost.

From the 02 – Project Charter Process (PCP) screen – PROJECT COST REPORT section

PROJECT COST REPORT (a 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. An the biolowing of the deciding on the link 2. Cick the (b) in the deciding mine the stery party project (net bit he [Coull To) drap-down menu) 3. Set (put angle of the the link 3. Cick the Deciminate butfort that may also also that (in the right of the Sule Rogardian) 4. Cick the Deciminate butfort to ave the report to your computer are uposed it into the MOBECT COST field below. 1. SetCost Deciminate butfort to ave the report to your computer are uposed it into the MOBECT COST field below.	

- Ensure the Project Budget you created in the Cost Module is approved
- Select the **REPORTED PROJECT COST** link, which will take you the Reports Menu

From the Reports menu

		Switch to Classic style	5058203 👻 📫 📭
Home Dashboard Projects Planning Forms Process	s Documents Calendar Contacts Bidding Cost Schedule Reports Setup ***		
UNIVERSITY OF X CENTRAL FLORIDA & CENTRAL FLORIDA & Getting:	and		
Recent Pages			×
Available Now Reports	Report Filters		
> Unfiled Account Reports	Select filter fields to include on recort		
WAREHOUSE > UCF BI Reports	Price By	Title	
> UCF KVIs and KPIs Metrics	Budget Line Items Projects Name		fx A V X
Learn more > UCF Standard e-Builder Report	Account Code		
> 🖬 FSBO Step Age Reports 🛛 🖷	Account Code With Description		
> 🖿 Dashboards 🔒	Actual Cost To Complete		
> 🖿 Administration Management 🖷	Actuals Approved		
> 🖿 Master Commitment Reports 🛛 🖷	Actuals Paid		
> 🖿 Actual Cost Reports 🛛 📾	Actuals Received		
> 🖿 Bidding Reports 🔒	Allocated Forecast		
> 🖿 Budget Reports 🔒	Allow Charges		
> Trend Analysis	Amount		
> Integration Reports	Amount Retained		
> E Planning woodule reports and > E Cashflow Reports A	Amount Retained Paid		
> Commitment Reports	Approved Budget Changes		
> Project Management & Control	Approved Commitment Changes		
> Companies and Contacts	Assumption		
> Troject Knowledge Base	Budget ID		
> Executive Program Summary Re	Budget Line Item ID		
> My Work Reports	Category		
> 🖿 Schedule Reports 🖉	Category With Description		
> 🗮 Executive Dashboard Reports 🛛 🔒	Contractor Construction Cost Add		
> 🖿 Admin Dashboard Reports 🛛 🖷	Created By		
> 🖿 Document Management 🖷	Current Budget		
> 🖿 MCO REPORTS 🔒	Current Commitments		
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- Input key words of the Project Name into the unlabeled dropdown menu to the right of the field displaying Equal To
- Select the dropdown menu now containing these key words
- Select the project, for which you are creating the Project Charter

From the Reports Menu

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• Select the Okay button

From the Reports Menu

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	> E FSB0 Step Age Reports	Project Manager: Not Assigned Building Name: BIOLOGICAL SCIENCES BUILDING	Date: 2020-01-22 12:41:10 Building Number: 0020
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	> 🖿 Administration Management 🛛 🗎	Budget Line Item Description	
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	> Submittal Module Reports	01.03.34 - Division 8 - Openings	\$20,000.00
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		01.03.48 - Division 32 - Exterior Improvement	\$10,000.00 \$10,000.00
		01.03.49 - Division 33 - Utilities 01.03.50 - Allowances & Alternates	\$6,000.00
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		01.03.52 - General Conditions 01.03.53 - Contractor's Fee	\$90,000,00

• Select the Export PDF button

From the Reports Menu



• Select the print icon

From the Print pop-up window

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• Select the Destination dropdown menu, then select the Save as PDF option

From the Print pop-up window

UNIVERSITY OF UCF CENTRAL FLORIDA		Print	
End User Training Project 07	Project Charter - Cost	Destination	Save as PDF
Project Manager: Not Assigned Building Name: BIOLOGICAL SCIENCES BUILDING Project Description: Training Project 7	Date: 2020-01-22 12:43:36 Building Number: 0020	Destination	Save as r Dr
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01.03.52 - General Conditions 01.03.53 - Contractor's Fee	\$90,000.00		
01.03.54 - Payment & Performance Bond 01.03.55 - Construction Contingency	\$30.000.00		

- Select the Save button
- Select the file directory on your computer, in which you wish to save this document
- Change the File name of the document to, Project Name + "Project Budget" + MMDDYYYY
- Save the document

In e-Builder, navigate back to the Process menu

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• Select the in-progress Project Charter process you are working with

From the 02 – Project Charter Process (PCP) screen – PROJECT COST section

PROJECT COST (update cost report here)	
* PROJECT COST:	Corg and drag file here or Resource Computer Browne e Builder

- Drag and drop the file you just created into the PROJECT COST field
- Or, select the Browse Computer button and select the file from the directory on your computer in which you saved the estimated project budget

From the 02 – Project Charter process (PCP) screen

e-Builder 📚	4 19 ?
02 - Project Charter Process (PCP)	Instructions
Start Process	Print Copy Check Spelling Show Workflow Submit Save Draft Delete Draft Cancel
Project:	End User Training Project 07
Project Number:	2016-007
Process:	02 - Project Chanter Process
* Subject:	Project Charter for End User Training Project 07) Priority Project Cost 0
Details Attached Documents (0) Attached Processes (0) Attached For	n (6)

- Select the Save Draft button
 - It is critical to save your work here as the next step of the process will cause you to navigate away from this page --- all unsaved work will be lost.

From the 02 – Project Charter Process (PCP) screen – PROJECT TIME REPORT section

PROJECT TIME REPORT (an Activa	ted schedule must be in place before running the report, otherwise no data will appear)
Poject Time Report.	To generate the Time report, do the following: 1. Aur the below report by clucking on the line 2. Clucks the () have do good memory (must be the [task to] drap down memory) 3. Beets your project from the list 4. Clucks the () draw to a the terms of the list of the list for good dial 6. Cluck the Download buttor to save the report to be uploaded into the field below. ***genorematic subsequent

- Ensure you have completed the pre-requisite of creating the Project Schedule in the Schedule Module
- Select the **REPORTED PROJECT SCHEDULE** link, which will take you the Reports Menu

From the Reports menu

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		UCF-574 Trever Collocum Hall		

- Input key words of the Project Name into the unlabeled dropdown menu to the right of the field displaying Equal To
- Select the dropdown menu now containing these key words
- Select the project, for which you are creating the Project Charter

From the Reports Menu

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• Select the Okay button

From the Reports Menu

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	> Administration Management					
	> Master Commitment Reports	PROJECT TIME 1 Overall Project		t Date Finish Date 25/18 09/23/19	Master Tasks	
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	> Bidding Reports	3 Project Assigned to PM 4 Project Charter Development		18/18 02/28/18 18/18 03/02/18		
	> Budget Reports	5 Project Charter Approval	10d 03/I	6/18 03/16/18		
	> Trend Analysis	6 OPR Development 7 Planning		03/09/18 9/18 05/21/18		
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		AD Scope Review AD Scope Review Requester Scope/Cost Review/Approval	5d 04/	2/18 04/08/18 9/18 04/20/18		
	> E Planning Module Reports	11 Contact A/E Firm		3/18 04/23/18		
	> Cashflow Reports	12 A/E Proposal Development 13 A/E Proposal Received		24/18 05/07/18 06/18 05/08/18		
	> Commitment Reports	14 A/E Proposal Review	5d 05/I	06/18 05/14/18		
	> E Project Management & Control	16 Design Funding Approval	8d 05/3	5/18 05/21/18 2/18 05/01/18		
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54 Bidding 30d 11/27/18 01/16/19				11/07/18						
	53	Pre bio wak Bidding		11/08/18						
50 pilo variadioti po 0/1/7/19 0/1/24/19 56 Quiete Received 0 d 01/17/19 0/1/24/19	55	Bid Validation	60	01/17/19	01/24/19					

- Select the Save button
- Select the file directory on your computer, in which you wish to save this document
- Change the File name of the document to, Project Name + "Project Schedule" + MMDDYYYY
- Save the document

In e-Builder, navigate back to the Process menu

	Q.						S	witch to Classic style	5058203 -	14 H
Home Dashboard Proj	jects Planning Forms Processes Do	ocuments Calendar Cont	tacts Bidding Cost Schedule	Reports Setup	•••					
UNIVERSITY OF X	Processes for 2018-007 - End User Training Project 07	•							Unf	inished Dra
Recent Pages •	Filter Processes							Start	t Selected Process Type	Start Pro
Project Menu	Search In	Processes Initiated By Me Proce	tesses in My Court ® All Processes							
etails	Type of Process	02 - Project Charter Process (PCP)	🔻 🗹 Draft 🗹 Open 🗐 Finished							
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Documents										-
Schedule										Fil
Cost	Processes Reports (1)									
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Bidding	Process Subject		Step	Responsible Actors	Step Age	In Step Since	Date Created .	Process Age	Status	Requeste Commen
Constant Submittals	PCP - 1 Project Charter for End User Train	ing Project 07 Priority 1 - Emergency Proje	ect Cost 985,600.00 AD Review	Ben Fauser	1	01.22.2020	01.21.2020	1	Submitted	
Webcam	PCP Project Charter for End User Traini	ng Project 07 Priority Project Cost 0					01.22.2020		NotAssigned	

• Select the in-progress Project Charter process you are working with

From the 02 – Project Charter Process (PCP) screen – PROJECT SCHEDULE section



- Drag and drop the file you just created into the PROJECT TIME field
- Or, select the Browse Computer button and select the file from the directory on your computer in which you saved the estimated project schedule
- Select the BUDGET AND SCHEDULE CONFIRMATION checkbox

From the 02 – Project Charter process (PCP) screen

e-Builder 🥪	ai 14 - ?
02 - Project Charter Process (PCP)	Instructions
Start Process	Print Copy Check Spelling Show Workflow Submit Surve Draft Detele Dark Cancel
Project:	End User Training Project 07
Project Number:	2016-007
Process:	02 - Project Charter Process
* Subject:	Project Charter for End User Training: Project 01) Priority (Project Cost 0
Details Attached Documents (0) Attached Processes (0) Attached For	n (i)

- Select the Save Draft button
 - It is advisable to save your work here as all unsaved work will be lost if you navigate away from the screen.

From the 02 – Project Charter Process (PCP) screen – PERMITTING section



• Select the BCO PERMIT REQUIRED dropdown menu

Please select an option	•
Please select an option	
YES	
NO	
UNKNOWN	

- o Select the applicable option
- Select SFM PERMIT REQUIRED dropdown menu

Please select an option	•
Please select an option	
YES	
NO	
UNKNOWN	

• Select ST JOHS PERMIT REQUIRED dropdown menu



• Select the applicable option

Select GENERATOR PERMIT REQUIRED dropdown menu

Please select an option	•
Please select an option	
YES	
мо	
UNKNOWN	

• Select the applicable option

From the 02 – Project Charter Process (PCP) screen – BIDDING/AWARD/CONSTRUCTION section

BIDDING/AWARD/CONSTRUCTIO [Lothing] intervenies 2. Type is derived 3 discretter of dis company anna in the Company base 3. Click due HIZER butues 4. Click on the memory same of the company identified For a list of justification discretiptions to be used as PAT reference, click here.	DN		
RECOMMENDED AWARD METHOD:	Please select an option V	LANDSCAPE CONTRACTOR:	[Lookup]
RECOMMENDATION OF AWARD:	Please select an option 🔻	ELECTRICAL CONTRACTOR:	[Looiup]
◆ REASONING FOR RECOMMENDED AWARD METHOD:	Forthane fort B Z U A 医 筆 筆 量 篇 译 读 旧 田 作 S	MECHANICAL CONTRACTOR:	[Lookug]
GC UNDER \$500K CONSTRUCTION COST:	[Lookup]	ROOFING CONTRACTOR:	[Lootup]
GC UNDER \$2M CONSTRUCTION COST:	[Lookup]	TREE CARE CONTRACTOR:	[Lookup]
CM UNDER \$2M CONSTRUCTION COST:	[Lookup]	TURF FIELD CONTRACTOR:	[Lookup]
REPAIR & MAINTENANCE:	[Loohup]	OTHER	

• Select the RECOMMENDED AWARD METHOD dropdown menu

Please select an option	۲
Please select an option	
ROTATION	
JUSTIFICATION	
EB QUOTES	
JOC	
SELF-PERFORM (UCF)	

- Select the award method you are recommending
 - ROTATION Next company up for a project in a pool of Continuing Service Vendors
 - JUSTIFICATION Vendor selected due to specific considerations related to the project
 - EB QUOTES Open bid among pool of relevant Continuing Service Vendors
 - JOC Job Order Contract for projects under \$500K
 - SELF-PERFORM Recommendation that UCF in-house personnel complete work

BIDDING/AWARD/CONSTRUCTIO [Loshay] autoretinas 1. (Initi [Loshay] 2. Option de fort characteristic de company states in the Company base 2. (Dich of the company states of the company identified 2. (Dich of the company states of the company identified For a list of justifications descriptions to be used as PA references, elick have.)N		
RECOMMENDED AWARD METHOD:	Please select an option 🔻	LANDSCAPE CONTRACTOR:	[Lookup]
RECOMMENDATION OF AWARD:	Prease select an option V	ELECTRICAL CONTRACTOR:	[Lookup]
◆ REASONING FOR RECOMMENDED AWARD METHOD:	Forthane Res. B Z U A B E E E E C C	MECHANICAL CONTRACTOR:	[Lookup]
GC UNDER \$500K CONSTRUCTION COST:	[Lookup]	ROOFING CONTRACTOR:	[Lookup]
GC UNDER \$2M CONSTRUCTION COST:	[Lookup]	TREE CARE CONTRACTOR:	[Loolup]
CM UNDER \$2M CONSTRUCTION COST:	[Losiup]	TURF FIELD CONTRACTOR:	[Lookup]
REPAIR & MAINTENANCE:	[Lookup]	OTHER	

From the 02 – Project Charter Process (PCP) screen – BIDDING/AWARD/CONSTRUCTION section

• Select the RECOMMENDATION OF AWARD dropdown menu



• Select the option that best aligns with your AWARD METHOD selection

BIDDING/AWARD/CONSTRUCTIO	DN		
Click [Lookup] Z. Type the first 3 characters of the company name in the Company box S. Click the FLTER button Click on the company name of the company identified			
For a list of justification descriptions to be used as PM reference, click here.			
RECOMMENDED AWARD METHOD:	Please select an option 🔻	LANDSCAPE CONTRACTOR:	[Lookup]
RECOMMENDATION OF AWARD:	Please select an option 🔻	ELECTRICAL CONTRACTOR:	[Lockup]
* REASONING FOR RECOMMENDED AWARD METHOD:	Forthane feat. B Z U A E E E E E E C C E E G C	MECHANICAL CONTRACTOR:	[.cotup]
GC UNDER \$500K CONSTRUCTION COST:	[Lookup]	ROOFING CONTRACTOR:	[Lockup]
GC UNDER \$2M CONSTRUCTION COST:	[Lookup]	TREE CARE CONTRACTOR:	[Lookup]
CM UNDER \$2M CONSTRUCTION COST:	[Lookup]	TURF FIELD CONTRACTOR:	[Lookup]
REPAIR & MAINTENANCE:	[Loohup]	OTHER	

From the 02 – Project Charter Process (PCP) screen – BIDDING/AWARD/CONSTRUCTION section

- Input why you are recommending the award method in the REASON FOR RECOMMENDED AWARD METHOD text field
 - It can be helpful to create and save statements for a number of common reasons in a separate file, from which you can then copy and paste a prepared statement into this field, modifying the statement verbiage if needed
- If specific vendors will be recommended, select the [Lookup] link next to a category of vendor you wish to recommend.

From the Lookup Company pop-up window

ilter Companies				Cle
Company:	kcg	Company Custom Fields:	Select a custom field	¥
City:		State:		Lookup
Area Code:		County:		Lookup
Zip Proximity:	Within 50 miles of	Project Companies Only:		
Construction Codes:			Lookup	6
				Filte
ompanies (Click on company r	name to view the details)			Can
Company Name-	City	State	Phone	
RCG Electric LLC	Orland	o FL		
RCG Productions LLC		mee FL		

• Search for a specific vendor you wish to recommend

• Input the name or a partial name into the Company field, then select the Filter button

From the Lookup Company pop-up window

kup Company					_
r Companies					Clea
Company:		Company Cu		ustom field 🔻	
City:			State.	ng Service Category	р
Area Code:			County: License N	e Expiration Date Jumber D ku	ıp
Zip Proximity:	Within 50 miles of	Project Com	panies Only:	xpiration Date	
Construction Codes:				Lookup 📵	
					Filter
Ipanies (Click on company r	name to view the details)				Cance
mpany Name		City S	tate	Phone	
		no companies for this selection			

- Search for a category of vendors to select from
 - Select the Company Custom Fields dropdown menu
 - Select Continuing Service Category

e-Builder®				4 19
ookup Company				Clea
Company:		Company Custom Fields:	Continuing Service Category Lookup	
City:		State:	Loc	kup
Area Code:		County:	Loc	okup
Zip Proximity:	Within 50 miles of	Project Companies Only:		
Construction Codes:			Lookup 🧃	
				Filter
Companies (Click on company	name to view the details)			Can
Company Name	City	State	Phone	
	There are no com	panies for this selection		
				Can

• Select the Lookup button underneath the field displaying Continuing Service Category

From the Lookup pop-up window

C= A TRI	Builder [®]	.	• ?
Look	up (Select the values to add below)	Insert Selected	Cancel
•	Value	Insert Selected	Cancel
	Architect		
	Building Automation Systems		
	Building Envelope		
	Building Envelope Contractor		
	Civil Engineer		
	Commissioning		
	Electrical		

- Select the checkbox next to the Value you wish to filter by
- Select the Insert Selected button

e-Builder®				1 6 14
ookup Company.				
Filter Companies				Clea
Company:		Company Custom Fields:	Continuing S Electrical	Lookup
City:		State:		Lookup
Area Code:		County:		Lookup
Zip Proximity:	Within 50 miles of	Project Companies Only:		
Construction Codes: Lookup				
				Filter
Companies (Click on company	r name to view the details)			Cance
Company Name		City	State	Phone
Ballentine Electric Inc		Orlando	FL	
Cape Design Engineering Co		Merritt Island	FL	
Giles Electric Company, Inc.		South Daytona	FL	(386) 767-5895
GRAEF-USA		Maitland	FL	(407) 659-6500
Hanson Professional Services I	nc	Springfield	IL	
Moses & Associates Inc		Gainesville	FL	
RCG Electric LLC		Orlando	FL	

- Select the Filter button
- Select your recommended vendor from the results

BIDDING/AWARD/CONSTRUCTIO [nohog] intraction 1. (cid. [Lookup] 2. Syste for first of characters of the company same in the Company best 3. (cide of the company same of the company identified 4. Cide on the company same of the company identified Far shir of junification descriptions to be und as PAI reference, cide here.)N		
RECOMMENDED AWARD METHOD:		LANDSCAPE CONTRACTOR:	[Lookup]
RECOMMENDATION OF AWARD:	Contractor's expertise and specialized experience on similar projects	ELECTRICAL CONTRACTOR:	RCG Electric LLC [Change] [Remove]
* REAGONING FOR RECOMMENDED AWARD METHOD:	[FortName • Ref. •] B / U ▲ 単等等等篇 (学 学 臣 臣 16 0) ③ ★ -3a	MECHANICAL CONTRACTOR:	[£0846]
GC UNDER \$500K CONSTRUCTION COST:	[Lookup]	ROOFING CONTRACTOR:	[Lookup]
GC UNDER \$2M CONSTRUCTION COST:	[Lookup]	TREE CARE CONTRACTOR:	[Lookup]
CM UNDER \$2M CONSTRUCTION COST:	[Lookup]	TURF FIELD CONTRACTOR:	[Lookup]
REPAIR & MAINTENANCE:	[Lookup]	OTHER:	

From the 02 – Project Charter Process (PCP) screen – BIDDING/AWARD/CONSTRUCTION section

- You will see your selected vendor displayed
- Repeat this process for any other vendors you wish to recommend

From the 02 – Project Charter process (PCP) screen

e-Builder 📚	46 MP ?
02 - Project Charter Process (PCP)	Instructions
Start Process	Print Copy Over Spelling Show Workflow Submit See Durh Delete Dark Coxed
Project:	End User Training Project 07
Project Number:	2016-007
Process:	02 - Project Charler Process
* Subject:	Project Charter for End User Training Project 07 Priority (Project Cost 0
Details Attached Documents (0) Attached Processes (0) Attached For	n (f)

- Select the Check Spelling button and correct any issues
- Select the Save Draft button
 - It is advisable to save your work here as all unsaved work will be lost if you navigate away from the screen.
- Select the Submit button to send the Project Charter to the FP&C MGR for review

Congratulations! You have created an e-Builder Project Charter.

The MGR will approve or return the Project Charter with comments.