Project Charter Schedule Narrative



A schedule is created by the PM during the Project Charter process, which provides a timeline of highlevel project deliverables during each of the Project Process Phases. The schedule developed at this stage is not intended to be as detailed or precise as the construction schedule maintained by the contractor. Its purpose is to provide FP&C leadership, and the client, with an approximate timeline on which to make further decisions. For FP&C leadership, they will review the schedule to ensure the time allocated to the project deliverables appears to be in line with their experience. For the client, the schedule allows them to determine how to incorporate the project into their operations activities.

Initiator

The Project Charter - Schedule is developed by the Project Manager (PM). The schedule differs from the budget as it is <u>not</u> required to be approved by an FP&C Manager, Facilities Planning (MGR) before it can be included in the Project Charter process. The MGR will review the schedule as part of their overall Project Charter review. Before developing the Project Charter – Schedule, the PM should meet with the client and all relevant partner departments to develop the basic Project Scope. The PM develops the schedule based on this scope.

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	РСР	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 MGR and/or Director to review and approve.
Owners Project Requirements	OPR	A written document that details the functional requirements of a project and the expectations of how it will be used and operated.
Commissioning	Cx	The process of assuring that all systems and components of a major piece of equipment, a process, a building or similar are designed, installed and tested in accordance with the operational requirements of the owner.
Minor Project Proposal	MPP	Proposal generated by the PM, which includes actual costs corresponding to the project's Statement of Work, project funding sources, and a proposed schedule. Acceptance of a Minor Project Proposal by the Client results in project funds being transferred into the FPC Project Account.
Purchase Order	РО	A Purchase Order (PO) is a binding contract between UCF and the Vendor. POs include the services/materials being purchased, the scope of service, payment terms, invoicing instructions and the purchase order number.

Key Terms



Architect/Engineer	A/E	Broad term for professionals responsible for the design of buildings, building components, and systems
Schematic Design	SD	Schematic Design produces rough drawings of a site plan, floor plans, elevations and often illustrative sketches or computer renderings.
Design Development	DD	Design development depicts a more detailed site plan as well as floor plans, elevations and section drawings with full dimensions.
Construction Documents	CD	Construction documents include a complete set of architectural drawings (site plan, floor plans, sections, details, etc.) that are combined with structural drawings (and possibly mechanical and electrical drawings) that have enough detail for the contractor to build your project.
General Contractor	GC	A general contractor is the contractor with main responsibility for the construction, improvement, or renovation project under contract, and is the party signing the prime construction contract for the project.
Trade Contractor	тс	A trade contractor is essentially a subcontractor who specializes in a specific part of a construction project. These parts can include electrical, plumbing, landscaping, and other activities.
Manager, Facilities Planning	MGR	Member of Facilities Planning & Construction leadership team, responsible for supervision of a subset of Project Managers and/or support personnel
Associate Vice President	AVP	Leader of the Facilities & Safety Division, reporting to the UCF Vice President of Administration & Finance
Building Code Office	всо	Now the Building Department. Responsible for coordination of all building inspections, permit issuance, and certifications of Completion or Occupancy for UCF construction projects
State Fire Marshal	SFM	State agency responsible for plan review and inspection of all life safety systems installed or modified during construction activities
UCF Certificate of Completion	сс	A certificate of completion is a document issued by the UCF Building Department certifying that all inspections have been passed
Certificate of Occupancy	со	A certificate of occupancy is a document issued by the UCF Building Department certifying a building's compliance with applicable building codes and other laws, and indicating it to be in a condition suitable for occupancy

Key Steps

Start: Review Basic Project Scope

Step1: Access e-Builder Schedule Module

Step2: Delete Schedule tasks and sub-tasks which don't apply to the project

Step3: Review and update duration of remaining sub-tasks

Step4: Save a snapshot of the schedule

Step5: Save the schedule

Finish: Schedule ready for inclusion in Project Charter Process

Review Basic Project Scope

Before creating a schedule, the PM should always review the basic Project Scope they created after meeting with the client and any partner departments involved with this project.

Access e-Builder Schedule Module

To create a schedule for a project, the PM logs into e-Builder, selects the project they wish to create a schedule for, and selects the Schedule module from the Project Menu. A full schedule is available for the PM as it was added by their project assistant when the project shell was created.

Delete Schedule tasks and sub-tasks which don't apply to the project

The PM reviews the schedule and is able to delete tasks and sub-tasks which don't apply to their project.

Review and update the duration of remaining sub-tasks

The PM reviews each schedule sub-task and updates its duration as appropriate in order to reflect the project-specific duration for the sub-task relative to the specific project timeline.

Save a snapshot of the Schedule

The PM takes a snapshot of the project schedule to record a baseline.

Save the Schedule

The PM saves the schedule to memorialize all updates.

Schedule ready for inclusion in the Project Charter Process

The schedule is now ready to be included in the Project Charter Process (PCP). The PM can initiate the PCP and execute the Project Schedule section, which will pull from the now saved project schedule information.

How to guide – The Project Charter - Schedule

Before creating the Project Schedule, the PM should complete the below activities:

- 1. Review Notes and Documents included the Project Details
- 2. Meet with the client and any relevant partner departments to develop a basic project scope
- 3. Review similar projects in e-Builder if desired
- 4. Gain input from the project A/E if applicable

Project Schedule Elements

There are 5 possible schedule elements which could be applicable for a project. The elements included in the project-specific schedule will be based on the scope of each project.

Schedule Element	Related Process(es)
PLANNING	Project Charter Process
DESIGN	 Minor Project Proposal – Design Commitment Approval(s) – Design Professionals Drawing & Design Plan Review – Schematic Design Documents Purchase Order Revision – Design Professionals Drawing & Design Plan Review – Design Development Documents Drawing & Design Plan Review – Construction Documents
BID/PERMIT	 Vendor Selection Bid Review Justification Rotation Hard Bid Minor Project Proposal – Construction Commitment Approval(s) – Construction Email permit communication and see Citizenserve TBD process
CONSTRUCTION	 Potential Change Order Change Order Purchase Order Revision - Contractor Commitment Transfer Process Contractor Pay-App & Consultant Invoice Owner Direct Purchase Invoice Internal Invoice Payments Request For Information FPC – FO Support Request Form Substantial Completion
CLOSEOUT	Final Completion and Close Out

Navigate to the Schedule

From the e-Builder Home screen

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• Select the **Projects** menu button

From the Projects Screen

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Learn more	15004002.1	15004002.1 Renovate former elec rm for a flume channel	Christopher Harris	0004	Minor	STORM WATER RESEARCH LAB	College of Engineerin	ng a	
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	15ZN3006	15ZN3006 Redesign curb and inlet - Pegasus Circle	Evan Shick	0045	Minor	BUSINESS ADMINISTRATION I	Business Administrat and Energy Services	on,	
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	17016006	17016006 RELOCATE RECYCLING AREA	Trey Beck	0016A	Minor	FACILITIES & SAFETY - A	Facilities Operations		Active

• Search for and select the project for which you wish to create a schedule

From the Projects screen – Project Menu

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e-Builder Project Administrator	Mason , Samantha eBAdmin						
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(view map) Address	3528 N Perseus Loop, 16A Orlando, FL 32816				No pro	ject photo uplo	adr
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• Select the **Schedule** link

Create the Schedule

Before a project is assigned to a project manager, their project assistant applies a schedule template, which creates a schedule with all five (5) schedule tasks and their sub-tasks.

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Table 1- Simplified Schedule Tasks and Sub-Tasks

Schedule Task	Sub-Tasks
PLANNING	Project Charter Development
DESIGN	 DESIGN COMMITMENT APPROVAL A/E Proposal Development Requester MPP Approval A/E Commitment Process CONSTRUCTION DOCUMENTS PHASE Drawing Development Issue CDs
BID/PERMIT	 ***Justification*** Scope Issued to GC GC Scope Walk GC Proposal Development ***Rotation*** Scope Issued to GC GC Scope Walk GC Proposal Development ***Hard Bid*** Bid Advertisement Bidding Bid Open/Review CONSTRUCTION PROCUREMENT Bid/Quote Received Requester MPP Approval GC Requisition/PO Process PERMITTING ***GC/TC Drawing Submit*** Doc Submitted to BCO BCO Review
CONSTRUCTION	 Permit Received Mobilization Construction Activities CC/CO Issued
CLOSEOUT	 Documents Final Payment Final Signoff

Deleting Schedule Elements

Not all schedule sub-tasks will apply to every project. Once the PM understands the project goals and develops a basic scope, they can delete unneeded sub-tasks from the schedule.

For example, if the contractor for the project will be selected via Justification, the PM can delete the ***Rotation*** and ***Hard Bid*** sub-tasks.

From the Schedule screen

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Webcam	1.3.2	Rotation***	13 days	05.13.2020	05.01.2020	0		***Rotation***						
_	1.3.3	Hard Bid ***	6 weeks	05.13.2020	05.24.2020	0		*** Hard Bid ***		<u> </u>				
	1.3.4	CONSTRUCTION PROCUREMENT	16 days	05.25.2020	07.17.2020	0		CONSTRUCTION I PERMITTING	NDCUREMENT		_			
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	1.4	CONSTRUCTION	20 days	10.05.2020	11.02.2020	0				CONSTRUCTIO				
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- Expand the BID/PERMIT task
- Select the desired sub-tasks
 - o ***Rotation***
 - ***Hard Bid***
- Right-click within the selected sub-elements

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DESIGN		10 weeks	03.04.2020	
 BID/PERMIT 		20.20 weeks	05.13.2020	
 Justification 		13 days	05.13.2020	
Scope Issued to GC		3 days	05.13.2020	
GC Scope Walk		5 days	05.18.2020	
GC Proposal Developme	nt	5 days	05.26.2020	
Rotation		13 days	05.13.2020	
*** Hard Bid ***	Task Details	weeks	05.13.2020	
CONSTRUCTION PROCURE	Add .	▶ 6 days	06.25.2020	
PERMITTING	Send	0.20 weeks	05.13.2020	
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CLOSEOUT	Set Baseline	0 days	11.02.2020	
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• Select the Delete option

The sub-tasks are removed

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Bidding	13.1.2	GC Scope Walk	5 days	05.18.2020	05.22.2020	0	14F	GC Scope Walk	
Submittals	13.1.3	GC Proposal Development	5 days	05.26.2020	06.01.2020	0	15F	GC Proposal Development	
Webcam	1.3.2	CONSTRUCTION PROCUREMENT	16 days	06.02.2020	06.23.2020	0		CONSTRUCTION PROCUREMENT	
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	1.4	CONSTRUCTION	20 days	09.10.2020	10.08.2020	0		CONSTRUCTION	
	1.5	CLOSEOUT	20 days	10.08.2020	11.05.2020	0		CLOSEOUT	

Updating schedule elements and sub-elements

When the project manager is satisfied that the remaining schedule elements are valid for the project, they review the associated sub-elements, and modify them as needed. The applied schedule template includes values in the Duration, which are placeholders. The PM must review each duration and input a value they believe accurately represents a realistic time frame for completion of the task.

Changing the duration of a sub-element

From the Schedule module

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ais Cost	12.1	 DESIGN COMMITMENT APPROVAL 	7 weeks	03.04.2020	04.21.2020	0		ROVAL					
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Webcam	1.2.2.1	Drawing Development	15 days	04.22.2020	05.12.2020	0	ars	Drawing Development					
Webcam	1.2.2.2	Issue CD's	0 days	05.13.2020	05.13.2020	0	10F	Issue CD's					
	13	BID/PERMIT	16.80 weeks	05.13.2020	09.09.2020	0		BID/PERMIT					
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	1.5	CLOSEOUT	20 days	10.08.2020	11.05.2020	0			CLOSEOUT				

- Open the task you wish to review
 - In this example, Drawing Development is selected
- The duration for Drawing Development is preset to 15 days

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1.3	BID/PERMIT			16.80 weeks	05.13.2020	09.09.2020
1.4	CONSTRUCTION			20 days	09.10.2020	10.08.2020
1.5	CLOSEOUT			20 days	10.08.2020	11.05.2020

- Select the 15 days Duration field
- Input a value or use the ^ or v arrows to change the value to the desired number of days
 - In this example, 20 days were used

Home Dashboard Pr	ojects Planning Forms Processes Documents	Calendar	Contacts B	idding Cost	Schedule		Reports Setup •••	
UNIVERSITY OF X	Schedule							
Recent Pages •	Last Modified by Michael Hagan 02.12.2020 12:20 PM							
Project Menu	Tasks Details Snapshots (1) History (787)							
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Details	Add Task 📲 Indent 🍾 Critical Path 个 Redo 🛃 Export 🖾 Send	Collapse			Working Time			
📩 Planning	Tasks Actions	Navig	ate Baselin	ne Zoom	Calendars		2020	
🖹 Forms	Task Name	Duration	Start	Finish	% Co	Pre	Q1 Q2	Q3
Issues	End User Training Project 07	9.70 months	02.12.2020	11.13.2020	0			
Processes	1 OVERALL PROJECT	9.70 months	02.12.2020	11.13.2020	0			
Documents	1.1 PLANNING	15 days	02.12.2020	03.03.2020	0			
Schedule	1.2 DESIGN	11 weeks	03.04.2020	05.20.2020	0		DESIGN	
iii\$ Cost	1.2.1 DESIGN COMMITMENT APPROVAL	7 weeks	03.04.2020	04.21.2020	0		ROVAL	
Contacts	1.2.1.1 A/E Proposal Development	10 days	03.04.2020	03.17.2020	0	3FS	pment	
💼 Calendar	1.2.1.2 Requester MPP Approval	15 days	03.18.2020	04.07.2020	0	6FS	(PP Approval	
Bidding	1.2.1.3 A/E Commitment Process	10 days	04.08.2020	04.21.2020	0	7FS	Commitment Process	
Submittals	1.2.2 CONSTRUCTION DOCUMENTS PHASE	20 days	04.22.2020	05.20.2020	0		CTION DOCUMENTS PHASE	
Webcam	1.2.2.1 Drawing Development	20 days	04.22.2020	05.19.2020	0	8FS	Drawing Development	
a webcam	1.2.2.2 Issue CD's	0 days	05.20.2020	05.20.2020	0	10F	Issue CD's	
	1.3 BID/PERMIT	16.80 weeks	05.20.2020	09.16.2020	0		BID/PERMIT	
	1.4 CONSTRUCTION	20 days	09.17.2020	10.15.2020	0			CONSTRUCTION
	1.5 CLOSEOUT	20 days	10.15.2020	11.13.2020	0			CLOSEOUT

- Changing the duration of the Drawing Development task impacts any schedule tasks with Drawing Development set as a *predecessor*. This then has a waterfall effect on subsequently linked tasks.
 - The Finish date of the Drawing Development task changed from 05.12.2020 to 05.19.2020
 - The Start date of the Issue CD's task changed from 05.13.2020 to 05.20.2020
 - \circ The Finish date of the Issue CD's task changed from 05.13.2020 to 05.20.2020

• The schedule template applies the predecessor relationships systematically. If a project manager adds a new sub-task, they must manually apply a predecessor relationship if applicable.

Saving updates and capturing the baseline

Once all updates have been made to the schedule the project manager saves the schedule and takes a snapshot to record the schedule as it appears at this point. The PM will be updating the schedule at regular intervals throughout the project life cycle and the snapshots will record specific past schedules, which can be compared to the current schedule.

From the Schedule module

UNIVERSITY OF X	Sche	dule											Schedules -
cent Poges	Last Modified by Michael Heges 10, 112:000 12:00 19:01												
oject Menu		Details Snapshots (1) History (787)	_										
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to Planning	_							2020				2021	
Forms		Task Name	Duration	Start	Finish	% Co	Pre	Q1 Q2	Q3	Q4	Q1	Q2	03
₹≣ Issues		End User Training Project 07	9.70 months	02.12.2020	11.13.2020	0							
Processes	1	 OVERALL PROJECT 	9.70 months	02.12.2020	11.13.2020	0							
Documents	1.1	PLANNING	15 days	02.12.2020	03.03.2020	0		—					
E Schedule	1.2	 DESIGN 	11 meeks	03.04.2020	05.20.2020	0		PESKSN					
👬 Cost	1.2.1	 DESIGN COMMITMENT APPROVAL 	7 weeks	03.04.2020	04.21.2020	0		ROVAL					
Contacts	12.1.1	A/E Proposal Development	10 days	03.04.2020	03.17.2020	0	3FS	ipment					
talendar Calendar	1.2.1.2	Requester MPP Approval	15 days	03.18.2020	04.07.2020	0	6FS	RPP Approval					
sidding	12.1.3	A/E Commitment Process	10 days	04.08.2020	04.21.2020	0	7FS	Commisment Process					
Submittals	1.2.2	 CONSTRUCTION DOCUMENTS PHASE 	20 days	04.22.2020	05.20.2020	0		CTION DOCUMENTS PHASE					
Webcam	1.2.2.1	Draving Development	20 days	04.22.2020	05.19.2020	0	855	Drawing Development					
a recount	1.2.2.2		0 days	05.20.2020	05.20.2020	0	105						
	1.3	BID/PERMIT	16.80 weeks	05.20.2020	09.16.2020	0		BID/PERMIT					
	1.4	CONSTRUCTION	20 days	09.17.2020	10.15.2020	0			CONSTRUCTION				
	1.5	CLOSEOUT	20 days	10.15.2020	11.13.2020	0			CL	OSEOUT			

• Select the **Save** button

Schee	Schedule								
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Tasks	Tasks Details Snapshots (1) History (906)								
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	Tasks	Actions	Navig	ate	Baseline	Zoom	Calendars		
	Task Name		Duration	Start		Finish	% Co		
	End User Training Project 07		9.70 months	02.12.2020		11.13.2020	0		
1	 OVERALL PROJECT 		9.70 months	02.12.2020		11.13.2020	0		
1.1	PLANNING		15 days	02.12.2020		03.03.2020	0		
1.2	DESIGN		11 weeks	03.04.2020		05.20.2020	0		
1.2.1	 DESIGN COMM 	ITMENT APPROVAL	7 weeks	03.04.2020		04.21.2020	0		
1.2.1.1	A/E Proposa	l Development	10 days	03.04.2020		03.17.2020	0		
1.2.1.2	Requester N	IPP Approval	15 days	03.18.2020		04.07.2020	0		
1.2.1.3	A/E Commit	ment Process	10 days	04.08.2020		04.21.2020	0		
1.2.2	 CONSTRUCTION 	N DOCUMENTS PHASE	20 days	04.22.2020		05.20.2020	0		
1.2.2.1	Drawing De	velopment	20 days	04.22.2020		05.19.2020	0		
1.2.2.2	Issue CD's		0 days	05.20.2020		05.20.2020	0		
1.3	BID/PERMIT		16.80 weeks	05.20.2020		09.16.2020	0		
1.4	CONSTRUCTION		20 days	09.17.2020		10.15.2020	0		
1.5	CLOSEOUT		20 days	10.15.2020		11.13.2020	0		

• Select the **Snapshot** menu item

Save Snapshot		×
* Name	Snapshot saved on 02.13.2020	
Save	Cancel	

• Snapshot saved on *current date* auto-populates

Save Snapshot		3
* Name	Snapshot saved on 02.13.2020	
Save	Cancel	

- Select the text in the name field
- Input a new name

Save Snapshot		×
* Name	Library Baseline Schedule 02.13.2020	
Save	Cancel	

• Select the **Save** button

You will be returned to the main schedule screen.

The schedule is now ready to be included in the Project Charter.