

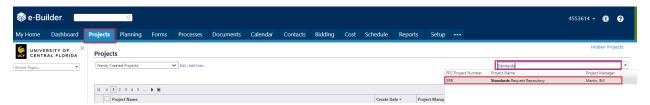
# e-Builder Standards Change Request (SCR) Process Guide

**Process Objective:** Request and adjudication for a change to the UCF Design and Construction Standards.

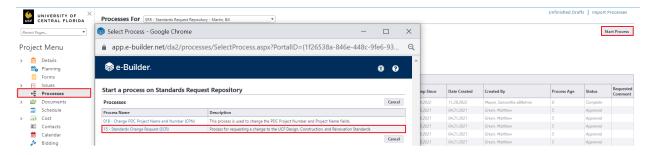
**Roles that may start process:** UCF employees may request a change to the UCF Design and Construction Standards. In addition, UCF welcomes feedback from external partners regarding our Standards. If an external partner would like to recommend a change to the Standards, they should contact a UCF employee sponsor to make the request on their behalf.

## How to start a process instance:

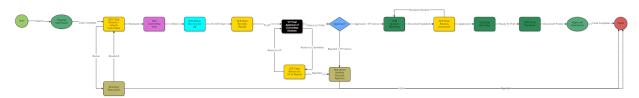
- 1. Log in to e-Builder by clicking the yellow e-Builder button at <a href="https://fp.ucf.edu/">https://fp.ucf.edu/</a> and using SSO credentials.
- 2. Search for the Standards Request Repository.



3. Click "Process" from the Project Menu, click "Start Process" in the upper right-hand corner and Select process "15 – Standards Change Request" from the list.



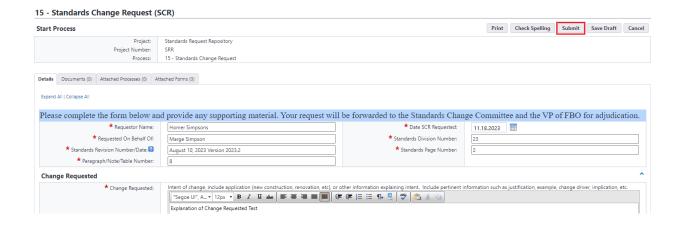
### Workflow:



Step 1: Start

Requestor reviews instructions, completes all data fields and uploads documentation that supports the request. Once complete, the requestor clicks the "Submit" button.

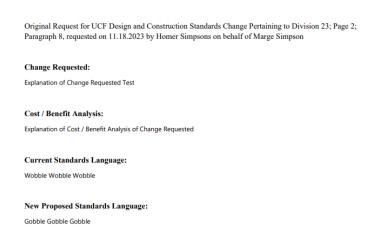
Published: November 20, 2023



# Mail Merge: Original Submission

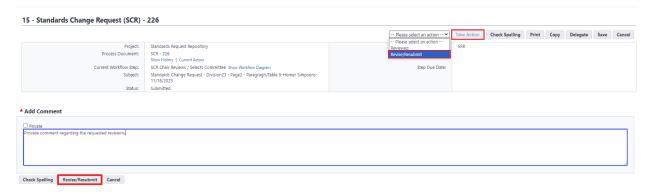
The process will emit a PDF document of the standards change request and store it within the Original Submissions folder of the Standards Request Repository project.

Original Version of Standards Change Request for SCR - 226

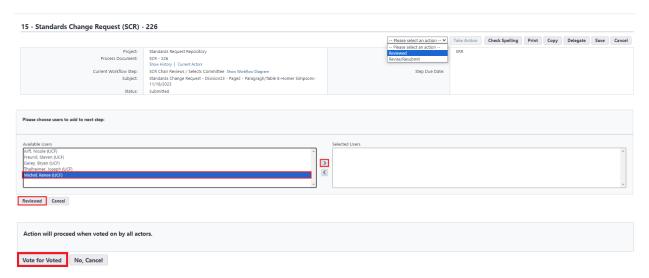


# Step 2: SCR Chair Reviews the Request / Selects Ad hoc Committee Members

The SCR Chair will review the request and may return the request to the requestor with comment for modifications. To return the process to the requestor, the SCR Chair will select "Revise / Resubmit" from the drop-down box, and then select the "Take Action" button. The SCR Chair will be <u>required</u> to provide comment and click "Revise / Resubmit" again.

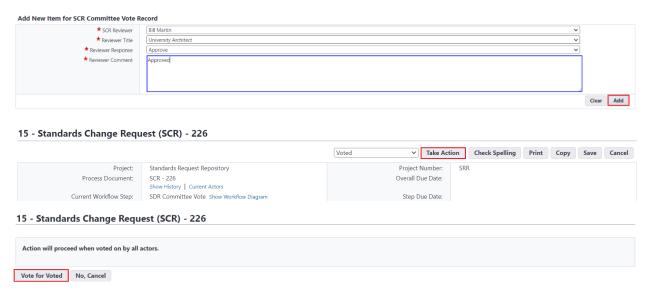


To forward the request to the committee for vote, the SCR Committee Chair will select "Reviewed" from the drop-down menu and click the "Take Action" button. The process will forward to the standing committee members for vote. The SCR Chair will have the option to select additional ad hoc members from a list and should select them if the scope of the change requires it. If additional reviewers are required, select them from the available users list and then click the ">" to move them to the selected users list. Once complete, click "Reviewed." If no additional reviewers are required, only click "Reviewed."



**Step 3: SCR Committee Vote (Target Duration < 5 days)** 

Members of the SCR Committee will review the requested change to the UCF Design and Construction Standards and cast a vote to approve, reject or request a meeting. Any member of the committee may request further input from the requestor or other UCF stakeholders by using the request comment function prior to casting their vote (See request comment instructions on Page 8). Once a committee member makes their decision, the committee member will select their name, title, vote, and provide comment. Once all selections have been made, the committee member will add their vote to the grid by clicking "add." Next the committee member will click the "Take Action" button to cast their vote and "vote for voted" to confirm their vote.

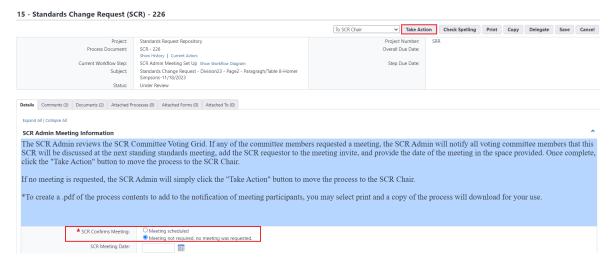


## Step 4: SCR Admin Meeting Set-Up (Target Duration < 2days)

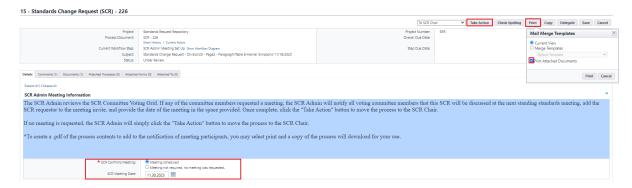
The SCR Admin reviews the SCR Committee Vote Record Grid.



If no meeting has been requested, the SCR Admin will select "Meeting not required, no meeting was requested" and click the take action button.



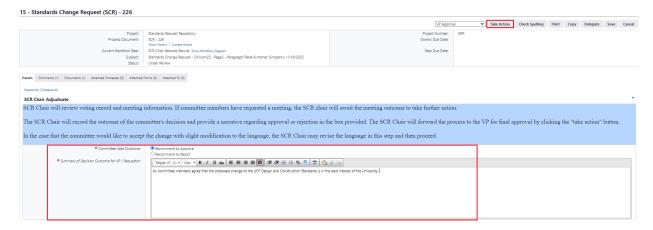
If any of the committee members requested a meeting, the SCR Admin will notify all committee members and the Requestor that this Standards Change Request will be discussed and the next available Standards Committee meeting. The related outlook meeting invite will be forwarded to the requestor and a PDF Print of the process will be added to the meeting invite. Once the meeting is confirmed, the SCR Admin will select "Meeting Scheduled," provide the date of the meeting in the space provided, and click the take action button to move the process forward to the SCR Chair.



## Step 5: SCR Chair Records Results / Makes Recommendation (Target Duration < 7 days)

If a meeting has been set to discuss the SCR, the SCR Chair will await the meeting outcome to take further action. During the meeting, the SCR Chair has the ability to modify the votes / comments of the committee to reflect their final votes and comments. In addition, the SCR chair has the ability to modify the language of the proposed standards language to accommodate feedback from the committee.

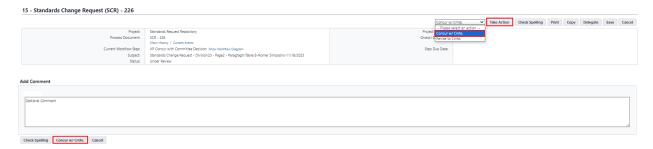
If no meeting has been requested, the SCR Chair will review the vote record grid, provide the committee's recommendation for approval or rejection and provide a summary of the justification for the recommendation. The SCR Chair will then select the "Take Action" button to forward the process to the Vice President of Facilities and Business Operations (VP) for final approval.



**Step 6: VP Final Approval of Committee Decision** 

The VP will review the request and the recommendation of the Standards Change Committee.

If the VP concurs with the committee's recommendation, the VP will select "Concur w. Cmte." from the drop-down and the "Take Action" button. The VP my opt to provide comment or not, then will click "Concur w/ Cmte." again. If the change was approved, the process will route for standards change implementation. If the change was rejected, the process will route to notify the requestor that the proposed change was rejected.



If the VP does not concur with the committee's recommendation, the VP will select "Revise to Cmte." from the drop-down and the "Take Action" button. The VP will be required to provide comment, then will click the "Revise to Cmte." again. The process will return to the SCR Chair to act per the VP's direction. The SCR Chair can reject directly to the requestor or revise the request and resubmit to the VP.





### Step 8: Office Technology Manager (OTM) Updates Standards

The OTM will update the standards, upload a PDF version to the process, and click "Take Action" to send the updates to the SCR Chair for review.

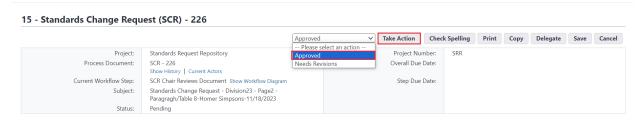
Step 8a: Requestor Notified Request Rejected

If the committee and the VP have elected to reject the change to the Standards, the process will return to the requestor to notify them. The requestor should review the comments, then select the "Take Action" button to finish the process.

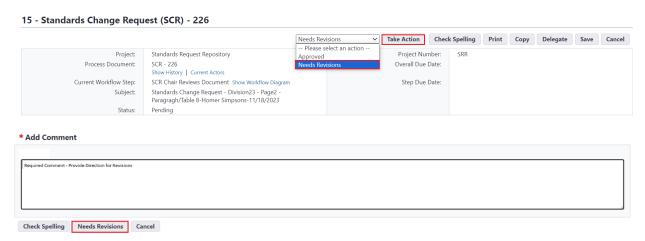
# **Step 9: SCR Chair Reviews Updated Document**

The SCR Chair will review the updated document.

To approve publication, the SCR Chair will select "Approved" from the drop-down menu and the "Take Action" button.



To return to the OTM for revisions, the SCR Chair will select "Needs Revisions" from the drop-down and click the "Take Action" button. A comment will be required. Use the comment box to provide direction for the revisions and click the "Needs Revision" button again.



# **Step 9: OTM Updates Standards**

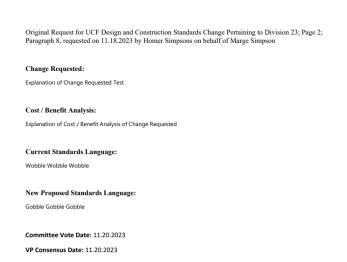
Once the updated standards publication has been approved by the SCR chair, the process will route to the OTM for quarterly publication to the UCF Design and Construction Standards. Once the Standards

have been updated, the OTM will email a link to the modified Standards the SCR Committee with copy to all staff of Planning, Design and Construction.

### Mail Merge - Final Record of Standards Change Request

Upon completion of the SCR Process, a mail merge will be emitted that provides the final record of the Standards Change Request.

Final Record of Standards Change Request for SCR - 226



#### **To Request Comment:**

If a step actor would like to request input from a UCF Stakeholder or the Requestor click the "comment" tab and click the "request comment" button. Another window will open with a list of all project participants. Select the person / people from who you request comment, select a respond by date, and pose your question in the box. The people from who you requested comment will receive an email notification communicating that you have requested comment. The SDR process will appear in their e-Builder home screen under "my processes" for easy access.

