

A Guide On Project Charter Process (PCP)

Prepared by UCF / e-Builder 10 February 2022







Dashboard

Calendar

Reports

Process Description:

Projects

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).

Forms

Processes

Documents

This process is initiated only by the Project Manager.

Process Participants:

- 1. Project Manager
- 2. Assistant Director
- 3. Director

Process Details:

Contacts

1. Process is initiated by the Project Manager.

Bidding

 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".

Schedule

2. The Associate/Assistant Director receives and reviews the information and can take the following actions:

Cost

- 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





.

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

ist 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]	TURE FIELD CONTRACTOR:	[Lookup]

3. Select necessary companies/persons from lookup fields

- Please select an option

- Please select an option -

- Please select an option

Proposed	Professional	Service	Firms	

* FLECTRICAL PANEL

* FIRE PENETRATIONS

* LEED REQUIRED:

INSPECTIONS REQUIRED:

EVALUATION:

[Lookup] instructions - Click [Lookup company identified] - Type the first 3 characters of	the company name in the Company box - Click the Fl	LTER button - Click on the company name of the
ARCHITECT:	[Lookup]	CIVIL ENGINEER:	[Lookup]
MEP ENGINEER:	[Lookup]	LANDSCAPE ARCHITECT:	[Lookup]
BUILDING ENVELOPE:	[Lookup]	THRESHOLD INSPECTION:	[Lookup]

* HVAC EVALUATION

REQUIRED:

COMMISSIONING AGENT

-- Please select an option -

-- Please select an option -

e-Builder 📚

Dashboard

Project Charter (PCP) Process

Calendar

Contacts

Bidding

Documents

Processes

Reports

AD Review:

1. Filter process instances by project and select desire instance

Forms

Projects

ilter Instances							Cancel
	Status:	Draft Dopen D Finished					
Step Name:							
Conta	ining Text:						
							Filter
roject: All Projects		Show All		Pa	ige 🛛 🗸 of	1 Show 25 ¥	Delete Instance
Project 🔺	Process	Subject	Status	Step	In Step Since	Date Created	Created By
Classroom Seating		Project Charter for Classroom Seating Priority 3 - Expedite (education/improvements) Project Cost 24000	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: GENERATOR PERMIT REQUIRED:
Design Information	
DESIGN TEAMAREOURED3	LIMPC PEOLIPED.

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 [Look name of the company identified	tup] - Type the first 3 characters of the company d	name in the Company box - Cli	ck the FILTER button - Click on the company
ARCHITECT:		CIVIL ENGINEER:	
MEP ENGINEER:		LANDSCAPE ARCHITECT:	
BUILDING ENVELOPE:		THRESHOLD INSPECTION:	

stimated 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	0.00
Management Services:	
e total will populate once you	advance the process.
TOTAL PROJECT COST:	
roject Schedule	
,	
n activated schedule must be in	a place before running the report, otherwise no data will appear)
Project Time Report:	To generate the Time report, do the following:
i ojeti i nici teporti	
	1. Run the below report by holding CTRL and clicking on the link to open it in a new tab
	 Click the [v] on the drop down menu (next to the [Equal To] drop down menu) Select your project from the list
	4. Click the [OK] button to run the report
	5. Click the Export Beport 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:	

Cost

Schedule

 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

usui	lication	
F	RECOMMENDED AWARD METHOD:	
	RECOMMENDATION OF AWARD:	
i	REASONING FOR RECOMMENDED AWARD METHOD:	

e-Builder 📚

Project Charter (PCP) Process

Calend

UCF

Director Review:

Dashboard

1. Filter process instances by project and select desire instance

Forms

Projects

Processes

Documents

ilter Instances							Cancel
	Status:	Draft Dopen Finished					
Step Name:							
Contain	ing Text:						
							Filter
roject: All Projects		Show All		Pa	ige 🛛 🗸 of	1 Show 25 ¥	Delete Instance
Project -	Process	Subject	Status	Step	In Step Since	Date Created	Created By
Classroom Seating		Project Charter for Classroom Seating Priority 3 - Expedite (education/improvements) Project Cost 24000	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: GENERATOR PERMIT REQUIRED:
Design Information	
DESIGN TEAM DEQUIDED2	

DESIGN TEAM REQUIRED?	UNIPC REQUIRED:	
ELECTRICAL PANEL	HVAC EVALUATION:	
EVALUATION:		
FIRE PENETRATIONS	COMMISSIONING AGENT	
INSPECTIONS REQUIRED:	REQUIRED:	
LEED REQUIRED:		

Proposed Professional Service Firms

[Lookup] instructions - Click [Look name of the company identified	up] - Type the first 3 characters of the company d	name in the Company box - Cli	ck the FILTER button - Click on the company
ARCHITECT:		CIVIL ENGINEER:	
MEP ENGINEER:		LANDSCAPE ARCHITECT:	
BUILDING ENVELOPE:		THRESHOLD INSPECTION:	

Contacts	Bidding	Cost	Schedule	Reports	
stimated 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	0.00				
Management Services:					
he total will populate once yo	u advance the process				
TOTAL PROJECT COST:	a advance the process.				
Project Schedule					
	in place before running the report, of	(h)			
Project Time Report:	To generate the Time report, do the f				
Project nine Report.	To generate the Time report, do the T	onowing.			
		ding CTRL and clicking on the link			
	 Click the [v] on the drop dot Select your project from the 	wn menu (next to the [Equal To] drop	down menu)		
	4. Click the [OK] button to run				
	5. Click the Export Report butt	ton (to the right of the blue floppy dis.			
	Click the Download button t	to save the report to be uploaded into	the field below.		
	REPORTED PROJECT SCHEDULE				

Confirmation Statement

BUDGET AND SCHEDULE CONFIRMATION:

PROJECT TIME:

 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

nearton	
RECOMMENDED AWARD METHOD:	
RECOMMENDATION OF AWARD:	
REASONING FOR RECOMMENDED AWARD METHOD:	ARD

e-B	Builder, 📚	•		Proje	ct Chai	rter (P	CP) Pr	ocess				UCF
ħ	Dashboard	Projects	Forms	Processes	Documents	Calendar	Contacts	Bidding	Cost	Schedule	Reports	+
PN	/I Sets Base	line Sched	ule:									
1.	The PM shall project sched		ect's Schedul	e module an	d set the baseli	ine						
	seline Schedule Reminder											
m	ow that the cha odule for this p oen select Basel	roject and set	the baseline for	or the schedu	le. Go do this,	ule						
												0

e-Builder 📚

Project Charter (PCP) Process

UCF

					N.		-		
Dashboard Project	s Forms	Processes	Documents	Calendar	Contacts	Bidding	Cost	Schedule	Reports
				Esti	mated Project Cost				
nish:					Design Estimate:	0.00			
1511.					Construction Estimate:	0.00			
					Permitting (BCO / SFM):	0.00			
Filter process instances	s by project and sele	ect desire i	instance		OIR Estimate:	0.00			
•	,,,,				UCFIT Estimate: Testing and Inspection	0.00			
					Estimate:	0.00			
Instances			Cancel		UES Cx / Commissioning:	0.00			
Status: Draft Dopen Finished					F & S Work Order Estimate:	0.00			
Step Name:	-				Other Estimate:	0.00			
Containing Text:	7				Other Description:	0.00			
L	_				Contingency Estimate: FP&C Professional	0.00			
			Filter		Management Services:	0.00			
: All Projects V Show All		Page 1 V of	1 Show 25 V Delete Instance						
oject - Process Subject	St		Date Created Created By	The t	otal will populate once you TOTAL PROJECT COST:	advance the process.			
assroom Seating PCP - 3 Project Charter for Classroom Seating P		ubmitted Finish 01.30.2018	01.30.2018 Chandra Mohan,						
Cost 24000			08:51AM Vignesh	Pro	ect Schedule				
				(An a	ctivated schedule must be in	place before running the report, ot	herwise no data will appear)		
					Project Time Report:	To generate the Time report, do the fo			
							ing CTRL and clicking on the li m menu (<i>next to the</i> [Equal To] <i>dr</i>		
						Select your project from the l	ist	op do minima (
Review information as-	needed all tields wi					4. Click the [OK] button to run	the report		
	needed. / In neide Wi	ii be reau-	-oniy. Approva	5					
	needed. / In neide Wi	lli be reau-	-only. Approval	5		5. Click the Export Report butto	on (to the right of the blue floppy o		
Review information as- will be listed.		li be reau-	-oniy. Approva	5		 Click the Export Report butto Click the Download button to 			
will be listed.		lli be reau-	-oniy. Approva	5		5. Click the Export Report butto	on (to the right of the blue floppy o		
will be listed.			-oniy. Approva	5	PROJECT TIME:	 Click the Export Report butto Click the Download button to 	on (to the right of the blue floppy o		
will be listed.	PROJECT M	DATE:	-oniy. Approva			 Click the Export Report butto Click the Download button to 	on (to the right of the blue floppy o		
will be listed. sject Information PROJECT PRIORITY:		DATE: ANAGER:	oniy. Approva		firmation Statement	 Click the Export Report butto Click the Download button to 	on (to the right of the blue floppy o		
will be listed. ject Information PROJECT PRIORITY: PROJECT NUMBER:	PROJECT M	DATE: ANAGER: RIPTION:	oniy. Approva		firmation Statement	 Click the Export Report butto Click the Download button to 	on (to the right of the blue floppy o		
will be listed. oject Information PROJECT PRIORITY: PROJECT NUMBER: REQUESTER NAME: BUILDING LIAISON: BUILDING NUMBER:	PROJECT M. PROJECT DESC PRINCIPAL INVES	DATE: ANAGER: RIPTION:	oniy. Approva	Con	firmation Statement BUDGET AND SCHEDULE CONFIRMATION:	 Click the Export Report butto Click the Download button to 	on (to the right of the blue floppy o		
will be listed. sject Information PROJECT PRIORITY: PROJECT NUMBER: REQUESTER NAME: BUILDING LIAISON:	PROJECT M. PROJECT DESC PRINCIPAL INVES	DATE: ANAGER: RIPTION: TIGATOR:	oniy. Approva	Con	firmation Statement	 Click the Export Report butto Click the Download button to 	on (to the right of the blue floppy o		
will be listed. oject Information PROJECT PRIORITY: PROJECT NUMBER: REQUESTER NAME: BUILDING LIAISON: BUILDING LIAISON: BUILDING NUMBER: ROOM NUMBER(5):	PROJECT M. PROJECT DESC PRINCIPAL INVES	DATE: ANAGER: RIPTION: TIGATOR:	oniy. Approva	Con Con	firmation Statement BUDGET AND SCHEDULE CONFIRMATION: tractor Selection up) instructions - Click [Looka	S. Click the Export Report Built G. Click the Download builton to **REPORTED PROJECT SCHEDULE** [] J. Type the first 3 characters of	n (to the right of the blue flappy or save the report to be uploaded in	to the field below.	button - Click on the comp
will be listed. oject Information PROJECT PRIORITY: PROJECT NUMBER: REQUESTER NAME: BUILDING LIAISON: BUILDING LIAISON: BUILDING NUMBER: ROOM NUMBER(5):	PROJECT M PROJECT DESC PRINCIPAL INVES DEPAI ST JOHNS	DATE: ANAGER: RIPTION: TIGATOR: RTMENT: S PERMIT	oniy. Approva	Con Con	firmation Statement BUDGET AND SCHEDULE CONFIRMATION: tractor Selection	S. Click the Export Report Built G. Click the Download builton to **REPORTED PROJECT SCHEDULE** [] J. Type the first 3 characters of	n (to the right of the blue flappy or save the report to be uploaded in	to the field below.	button - Click on the comp
will be listed. piect Information PROJECT PRIORITY: PROJECT NUMBER: REQUESTER NAME: BUILDING LIAISON: BUILDING HUMBER; ROOM NUMBER(5): mmitting BCO PERMIT REQUIRED:	PROJECT M PROJECT DESC PRINCIPAL INVES DEPAI ST JOHNS R	DATE: ANAGER: RIPTION: TIGATOR: RTMENT: S PERMIT EQUIRED:	oniy. Approva	Con Con	firmation Statement BUDGET AND SCHEDULE CONFIRMATION: tractor Selection up) instructions - Click [Looka of the company identified	S. Click the Export Report Built G. Click the Download builton to **REPORTED PROJECT SCHEDULE** [] J. Type the first 3 characters of	n (to the right of the blue floopy or save the report to be uploaded in save the report to be uploaded in f the company name in the	to the field below.	button - Click on the comp
will be listed. pject Information PROJECT PRIORITY: PROJECT NUMBER: REQUESTER NAME: BUILDING LIAISON: BUILDING NUMBER: ROOM NUMBER(5): rmitting	PROJECT M PROJECT DESC PRINCIPAL INVES DEPAI ST JOHN: R GENERATO	DATE: ANAGER: RIPTION: TIGATOR: RTMENT: S PERMIT S PERMIT	oniy. Approva	Con Con	firmation Statement BUDGET AND SCHEDULE CONFIRMATION: tractor Selection up] instructions - Click [Looks of the company identified list of justification descriptions	S. Click the Export Report Patter G. Click the Download button to "*REPORTED PROJECT SCHEDULE** ""	n (to the right of the blue floopy or save the report to be uploaded in save the report to be uploaded in f the company name in the	Company box - Click the FILTER	button - Click on the comp
will be listed. pect Information PROJECT PRIORITY: PROJECT NUMBER: REQUESTER NAME: BUILDING UNISON: BUILDING NUMBER: ROOM NUMBER: ROOM NUMBER: SFM PERMIT REQUIRED: SFM PERMIT REQUIRED:	PROJECT M PROJECT DESC PRINCIPAL INVES DEPAI ST JOHN: R GENERATO	DATE: ANAGER: RIPTION: TIGATOR: RTMENT: S PERMIT EQUIRED:	oniy. Approva	Con Con	firmation Statement BUDGET AND SCHEDULE CONFIRMATION: tractor Selection up) instructions - Click [Looka of the company identified	S. Click the Export Report Patter G. Click the Download button to "*REPORTED PROJECT SCHEDULE** ""	n (to the right of the blue flappy or save the report to be uploaded in save the report to be uploaded in f the company name in the .	to the field below.	button - Click on the comp
will be listed. ject Information PROJECT PRIORITY: PROJECT NUMBER: REQUESTER NAME BUILDING LUISSON: BUILDING NUMBER: ROOM NUMBER:S; mitting ECO PERMIT REQUIRED: SFM PERMIT REQUIRED: sign Information	PROJECT M PROJECT DESC PRINCIPAL INVES DEPAI ST JOHN: RI GENERATO RI	DATE: ANAGER: RIPTION: TIGATOR: RTMENT: S PERMIT EQUIRED: EQUIRED:	oniy. Approva	Con Con	firmation Statement BUDGET AND SCHEDULE CONFIRMATION: CONFIRMATION: tractor Selection up] instructions - Click [Looks of the company identified list of justification descriptions GC UNDER S500K CONSTRUCTION COST: CM UNDER S4M	S. Click the Export Report Patter G. Click the Download button to "*REPORTED PROJECT SCHEDULE** ""	n (to the right of the blue flappy or save the report to be uploaded in f the company name in the .	Company box - Click the FILTER GC UNDER S4M	button - Click on the comp
will be listed. pict Information PROJECT PRIORITY: PROJECT NUMBER: REQUESTER NAME: BUILDING LIAISON: BUILDING NUMBER: REQUESTER NAME: BUILDING NUMBER: BUILDI	PROJECT M PROJECT DESC PRINCIPAL INVES DEPAI ST JOHN R GENERATOR R UMPC RI	DATE: ANAGER: RIPTION: TIGATOR: RTMENT: S PERMIT EQUIRED: R PERMIT EQUIRED: EQUIRED:	oniy. Approva	Con Con TLook name For a	firmation Statement BUDGET AND SCHEDULE CONFIRMATION: tractor Selection up) instructions - Click [Looka of the company identified list of justification descriptions GC UNDER 5500K CONSTRUCTION COST: CM UNDER 54M CONSTRUCTION COST:	S. Click the Export Report Patter G. Click the Download button to "*REPORTED PROJECT SCHEDULE** ""	n (to the right of the blue flappy or save the report to be uploaded in f the company name in the .	Company box - Click the FILTER GC UNDER S4M JRUCTION COST; R MAINTENANCE:	button - Click on the comp
will be listed. pipet Information PROJECT PRIORITY: PROJECT NUMBER: REQUESTER NAME: BUILDING LIAISON: BUILDING NUMBER: ROOM NUMBER(S): mitting BCO PERMIT REQUIRED: SFM PERMIT REQUIRED: SFM PERMIT REQUIRED: BEIGN TEAM REQUIRED: ELECTRICAL PANEL	PROJECT M PROJECT DESC PRINCIPAL INVES DEPAI ST JOHN: RI GENERATO RI	DATE: ANAGER: RIPTION: TIGATOR: RTMENT: S PERMIT EQUIRED: R PERMIT EQUIRED: EQUIRED:	oniy. Approva	Con Con TLook name For a	firmation Statement BUDGET AND SCHEDULE CONFIRMATION: CONFIRMATION: tractor Selection up] instructions - Click [Looks of the company identified list of justification descriptions GC UNDER S500K CONSTRUCTION COST: CM UNDER S4M	S. Click the Export Report Patter G. Click the Download button to "*REPORTED PROJECT SCHEDULE** ""	n (to the right of the blue flappy or save the report to be uploaded in f the company name in the .	Company box - Click the FILTER GC UNDER S4M TRUCTION COST: & MAINTENANCE: MECHANICAL	button - Click on the comp
will be listed. poject Information PROJECT PRIORITY: PROJECT NUMBER: REQUESTER NAME: BUILDING LIAISON: BUILDING NUMBER: REQUESTER NAME: BUILDING NUMBER: BUIL	PROJECT M PROJECT DESC PRINCIPAL INVES DEPAI ST JOHN R GENERATOR R UMPC RI	DATE: ANAGER: RIPTION: TIGATOR: RTMENT: S PERMIT EQUIRED: EQUIRED: EQUIRED: UJATION:	oniy. Approva	Con Con Look For a E	firmation Statement BUDGET AND SCHEDULE CONFIRMATION: tractor Selection up) instructions - Click [Looka of the company identified list of justification descriptions GC UNDER 5500K CONSTRUCTION COST: CM UNDER 54M CONSTRUCTION COST:	S. Click the Export Report Patter G. Click the Download button to "*REPORTED PROJECT SCHEDULE** ""	n (io the right of the blue flappy o save the report to be uploaded in f the company name in the	Company box - Click the FILTER GC UNDER S4M JRUCTION COST; R MAINTENANCE:	button - Click on the comp
will be listed. ject Information PROJECT PRIORITY: PROJECT PRIORITY: PROJECT NUMBER: REQUESTER NAME BUILDING UMBER: ROOM NUMBER: ROOM NUMBER: ROOM NUMBER: SFM PERMIT REQUIRED: SFM PERMIT REQUIRED: SFM PERMIT REQUIRED: EVALUATION: EVAL	PROJECT M PROJECT DESC PRINCIPAL INVES DEPAI ST JOHINI R GENERATO R UMPC RI UMPC RI UMPC RI COMMISSIONIN	DATE: ANAGER: RIPTION: TIGATOR: RTMENT: S PERMIT EQUIRED: EQUIRED: EQUIRED: UJATION:	oniy. Approva	Con [Look name For a	firmation Statement BUDGET AND SCHEDULE CONFIRMATION: tractor Selection up] instructions - Click [Looks e of the company identified list of justification descriptions GC UNDER S500K CONSTRUCTION COST: CM UNDER S4M CONSTRUCTION COST: LECTRICAL CONTRACTOR:	S. Click the Export Report Patter G. Click the Download button to "*REPORTED PROJECT SCHEDULE** ""	n (to the right of the blue flappy of a save the report to be uploaded in f the company name in the .	Company box - Click the FILTER GC UNDER S4M TRUCTION COST: & MAINTENANCE: MECHANICAL CONTRACTOR:	button - Click on the comp
will be listed. ject Information PROJECT PRIORITY: PROJECT PRIORITY: PROJECT NUMBER: REQUESTER NAME: BUILDING LIAISON: BUILDING NUMBER: BUILDING NUMBER: ROOM NUMBER(S): mitting BCO PERMIT REQUIRED: SFM PERMIT REQUIRED: SFM PERMIT REQUIRED: SFM PERMIT REQUIRED: EVALUATION: FIRE PERKETRATIONS	PROJECT M PROJECT DESC PRINCIPAL INVES DEPAI ST JOHINI R GENERATO R UMPC RI UMPC RI UMPC RI COMMISSIONIN	DATE: ANAGER: RIPTION: TIGATOR: RTMENT: S PERMIT EQUIRED: CQUIRED: LUATION: G AGENT	oniy. Approva	Con [Look name For a	firmation Statement BUDGET AND SCHEDULE CONFIRMATION: tractor Selection up] Instructions - Click [Looko of the company identified list of Justification descriptions GC UNDER S500K CONSTRUCTION COST: CCM UNDER \$4M CONSTRUCTION COST: LECTRICAL CONTRACTOR: NNDSCAPE CONTRACTOR:	S. Click the Export Report Patter G. Click the Download button to "*REPORTED PROJECT SCHEDULE** ""	n (to the right of the blue flappy of a save the report to be uploaded in f the company name in the .	Company box - Click the FILTER GC UNDER S4M TRUCTION COST: k MAINTENANCE: MECHANICAL CONTRACTOR: RE CONTRACTOR:	button - Click on the comp
will be listed.	PROJECT M PROJECT DESC PRINCIPAL INVES DEPAI ST JOHINI R GENERATO R UMPC RI UMPC RI UMPC RI COMMISSIONIN	DATE: ANAGER: RIPTION: TIGATOR: RTMENT: S PERMIT EQUIRED: CQUIRED: LUATION: G AGENT	oniy. Approva	Con [Look name For a	firmation Statement BUDGET AND SCHEDULE CONFIRMATION: tractor Selection up] instructions - Click [Looks of the company identified list of justification descriptions GC UNDER STORY CONSTRUCTION COST: CCTONTRUCTION COST: LCTRICAL CONTRACTOR: NUDSCAPE CONTRACTOR: NUDSCAPE CONTRACTOR:	S. Click the Export Report Patter G. Click the Download button to "*REPORTED PROJECT SCHEDULE** ""	n (to the right of the blue flappy of a save the report to be uploaded in f the company name in the .	Company box - Click the FILTER GC UNDER S4M TRUCTION COST: k MAINTENANCE: MECHANICAL CONTRACTOR: RE CONTRACTOR:	button - Click on the comp
will be listed. poet Information PROJECT PRIORITY: PROJECT NUMBER: REQUESTER NAME: BUILDING LAISON: BUILDING NUMBER; ROOM NUMBER(S): rmitting BCO PERMIT REQUIRED: SFM PERMIT REQUIRED: SFM PERMIT REQUIRED: SEGN Information DESIGN TEAM REQUIRED: EVALUATION: FIRE PERMITARIONS INSPECTIONS REQUIRED: LEED REQUIRED: SEGN PROFESSIONAL SERVICE FIRMS	PROJECT M PROJECT DESC PRINCIPAL INVES DEPAI ST JOHINI R GENERATO R UMPC RI HVAC EVAL COMMISSIONIN RI	DATE: ANAGER: RIPTION: TIGATOR: RTMENT: S PERMIT EQUIRED: CQUIRED: CQUIRED: G AGENT EQUIRED:		Con [Look name For a E U Just	firmation Statement BUDGET AND SCHEDULE CONFIRMATION: tractor Selection up] instructions - Click [Looks of the company identified list of justification descriptions GC UNDER STORM CONSTRUCTION COST: LECTRICAL CONTRACTOR: ROOFING CONTRACTOR: ROOFING CONTRACTOR: ROOFING CONTRACTOR: OTHER:	S. Click the Export Report Patter G. Click the Download button to "*REPORTED PROJECT SCHEDULE** ""	n (to the right of the blue flappy of a save the report to be uploaded in f the company name in the .	Company box - Click the FILTER GC UNDER S4M TRUCTION COST: k MAINTENANCE: MECHANICAL CONTRACTOR: RE CONTRACTOR:	button - Click on the comp
will be listed.	PROJECT M PROJECT DESC PRINCIPAL INVES DEPAI ST JOHINI R GENERATO R UMPC RI HVAC EVAL COMMISSIONIN RI	DATE: ANAGER: RIPTION: TIGATOR: RTMENT: S PERMIT EQUIRED: CQUIRED: CQUIRED: G AGENT EQUIRED:		Con [Look name For a E U Just	firmation Statement BUDGET AND SCHEDULE CONFIRMATION: tractor Selection up] instructions - Click [Looks of the company identified list of justification descriptions GC UNDER STOOK CONSTRUCTION COST: CONSTRUCTION COST: CONSTRUCTION COST: LECTRICAL CONTRACTOR: ROOFING CONTRACTOR: ROOFING CONTRACTOR: OTHER: iffication RECOMMENDED AWARD METHOD:	S. Click the Export Report Patter G. Click the Download button to "*REPORTED PROJECT SCHEDULE** ""	n (to the right of the blue flappy of a save the report to be uploaded in f the company name in the .	Company box - Click the FILTER GC UNDER S4M TRUCTION COST: k MAINTENANCE: MECHANICAL CONTRACTOR: RE CONTRACTOR:	button - Click on the comp
will be listed.	PROJECT MA PROJECT DESC PRINCIPAL INVES DEPAI ST JOHN: R GENERATO R UMPC RI HVAC EVAL COMMISSIONIN RI COMMISSIONIN RI	DATE: ANAGER: RIPTION: TIGATOR: RTMENT: S PERMIT EQUIRED: EQUIRED: EQUIRED: G AGENT EQUIRED: MY box - Click the FILT		Con [Look name For a E U Just	firmation Statement BUDGET AND SCHEDULE CONFIRMATION: tractor Selection ap] instructions - Click [Looks of the company identified list of justification descriptions GC UNDER SSMOK CONSTRUCTION COST: ECTRICAL CONTRACTOR: ROOFINCA CONTRACTOR: ROOFINC CONTRACTOR: OTHER: iffication RECOMMENDED AWARD METHOD: RECOMMENDED AWARD METHOD: RECOMMENDED AWARD	S. Click the Export Report Patter G. Click the Download button to "*REPORTED PROJECT SCHEDULE** ""	n (to the right of the blue flappy of a save the report to be uploaded in f the company name in the .	Company box - Click the FILTER GC UNDER S4M TRUCTION COST: k MAINTENANCE: MECHANICAL CONTRACTOR: RE CONTRACTOR:	button - Click on the comp
will be listed. pict Information PROJECT PRIORITY: PROJECT NUMBER: REQUESTER NAME: BUILDING LUISON: BUILDING LUISON: BUILDING NUMBER: ROOM NUMBER:	PROJECT M PROJECT DESC PRINCIPAL INVES DEPAI ST JOHNS R GENERATOR R UMPC RI UMPC RI UMPC RI COMMISSIONIN RI COMMISSIONIN RI COVIL ET	DATE: ANAGER: RIPTION: TIGATOR: RTMENT: S PERMIT EQUIRED: EQUIRED: UATION: G AGENT EQUIRED: S PAC- CLick the FILTI NGINEER:		Con [Look name For a E U Just	firmation Statement BUDGET AND SCHEDULE CONFIRMATION: tractor Selection up) Instructions - Click [Looko of the company identified GC UNDER STOOK GC UNDER STOOK CONSTRUCTION COST: CCM UNDER STAM CONSTRUCTION COST: LECTRICAL CONTRACTOR: ROOFING CONTRACTOR: ROOFING CONTRACTOR: OTHER: ification RECOMMENDED AWARD RECOMMENDED AWARD RECOMMENDED AWARD RECOMMENDATION OF AWARD:	S. Click the Export Report Patter G. Click the Download button to "*REPORTED PROJECT SCHEDULE** ""	n (to the right of the blue flappy of a save the report to be uploaded in f the company name in the .	Company box - Click the FILTER GC UNDER S4M TRUCTION COST: k MAINTENANCE: MECHANICAL CONTRACTOR: RE CONTRACTOR:	button - Click on the comp
will be listed. jet Information PROJECT PRIORITY: PROJECT PRIORITY: PROJECT NUMBER: BUILDING LIAISON: BUILDING NUMBER: ROOM NUMBER(S): mitting BCO PERMIT REQUIRED: SFM PERMIT REQUIRED: SFM PERMIT REQUIRED: SFM PERMIT REQUIRED: LEED REQUIRED: LEED REQUIRED: LEED REQUIRED: COMPANY Identified COMPANY	PROJECT M PROJECT DESC PRINCIPAL INVES DEPAI ST JOHNIN R GENERATO R UMPC RI HVAC EVAI HVAC EVAI COMMISSIONIN RI acters of the company name in the Company CIVIL EI LANDSCAPE AR	DATE: ANAGER: RIPTION: TIGATOR: RTMENT: S PERMIT R PERMIT R PERMIT R QUIRED: QUIRED: G AGENT EQUIRED: G AGENT SQUIRED: CHITECT:		Con [Look name For a E U Just	firmation Statement BUDGET AND SCHEDULE CONFIRMATION: tractor Selection up] Instructions - Click [Looka of the company identified list of Justification descriptions GC UNDER S500K CONSTRUCTION COST: CCMUNDER SIM CONSTRUCTION COST: LECTRICAL CONTRACTOR: ROOFING CONTRACTOR: ROOFING CONTRACTOR: OTHER: ification RECOMMENDED AWARD REASONING FOR RECOMMENDED AWARD: REASONING FOR	S. Click the Export Report Patter G. Click the Download button to "*REPORTED PROJECT SCHEDULE** ""	n (to the right of the blue flappy of a save the report to be uploaded in f the company name in the .	Company box - Click the FILTER GC UNDER S4M TRUCTION COST: k MAINTENANCE: MECHANICAL CONTRACTOR: RE CONTRACTOR:	button - Click on the comp
will be listed. pict Information PROJECT PRIORITY: PROJECT NUMBER: REQUESTER NAME: BUILDING LUISON: BUILDING LUISON: BUILDING NUMBER: ROOM NUMBER:	PROJECT M PROJECT DESC PRINCIPAL INVES DEPAI ST JOHNS R GENERATOR R UMPC RI UMPC RI UMPC RI COMMISSIONIN RI COMMISSIONIN RI COVIL ET	DATE: ANAGER: RIPTION: TIGATOR: RTMENT: S PERMIT R PERMIT R PERMIT R QUIRED: QUIRED: G AGENT EQUIRED: G AGENT SQUIRED: CHITECT:		Con [Look name For a E U Just	firmation Statement BUDGET AND SCHEDULE CONFIRMATION: tractor Selection up] instructions - Click [Looks of the company identified list of justification descriptions GC UNDER SSOOK CONSTRUCTION COST: CCM UNDER SMM CONSTRUCTION COST: LECTRICAL CONTRACTOR: ROOFING CONTRACTOR: ROOFING CONTRACTOR: Ification RECOMMENDED AWARD: READONING FOR READONING FOR READONING FOR	S. Click the Export Report Patter G. Click the Download button to "*REPORTED PROJECT SCHEDULE** ""	n (to the right of the blue flappy of a save the report to be uploaded in f the company name in the .	Company box - Click the FILTER GC UNDER S4M TRUCTION COST: k MAINTENANCE: MECHANICAL CONTRACTOR: RE CONTRACTOR:	button - Click on the comp
will be listed. piect Information PROJECT PRIORITY: PROJECT PRIORITY: PROJECT NUMBER: REQUESTER NAME: BUILDING LIAISON: BUILDING NUMBER: ROOM NUMBER(S): rmitting BCO PERMIT REQUIRED: SFM PERMIT REQUIRED: SFM PERMIT REQUIRED: SFM PERMIT REQUIRED: ELECTRICAL PANEL EVALUATION: FIRE PENATUROS: LEED REQUIRED: COMPARY Identified ARCHITECT: MEP ENGINEE:	PROJECT M PROJECT DESC PRINCIPAL INVES DEPAI ST JOHNIN R GENERATO R UMPC RI HVAC EVAI HVAC EVAI COMMISSIONIN RI acters of the company name in the Company CIVIL EI LANDSCAPE AR	DATE: ANAGER: RIPTION: TIGATOR: RTMENT: S PERMIT R PERMIT R PERMIT R QUIRED: QUIRED: G AGENT EQUIRED: G AGENT SQUIRED: CHITECT:		Con Look For a El L	firmation Statement BUDGET AND SCHEDULE CONFIRMATION: tractor Selection up] Instructions - Click [Looka of the company identified list of Justification descriptions GC UNDER S500K CONSTRUCTION COST: CCMUNDER SIM CONSTRUCTION COST: LECTRICAL CONTRACTOR: ROOFING CONTRACTOR: ROOFING CONTRACTOR: OTHER: ification RECOMMENDED AWARD REASONING FOR RECOMMENDED AWARD: REASONING FOR	S. Click the Export Report Patter G. Click the Download button to "*REPORTED PROJECT SCHEDULE** ""	n (to the right of the blue flappy of a save the report to be uploaded in f the company name in the .	Company box - Click the FILTER GC UNDER S4M TRUCTION COST: k MAINTENANCE: MECHANICAL CONTRACTOR: RE CONTRACTOR:	button - Click on the comp
will be listed. oject Information PROJECT PRIORITY: PROJECT PRIORITY: PROJECT NUMBER: REQUISTER NAME: BUILDING LIAISON: BUILDING NUMBER: ROOM NUMBER(S): ************************************	PROJECT M PROJECT DESC PRINCIPAL INVES DEPAI ST JOHNIN R GENERATO R UMPC RI HVAC EVAI HVAC EVAI COMMISSIONIN RI acters of the company name in the Company CIVIL EI LANDSCAPE AR	DATE: ANAGER: RIPTION: TIGATOR: RTMENT: S PERMIT R PERMIT R PERMIT R PERMIT R QUIRED: G AGENT EQUIRED: G AGENT EQUIRED: S QUIRED: CHITECT:		Con Look For a El L	firmation Statement BUDGET AND SCHEDULE CONFIRMATION: tractor Selection up] instructions - Click [Looks of the company identified list of justification descriptions GC UNDER SSOOK CONSTRUCTION COST: CON UNDER S4M CONSTRUCTION COST: LECTRICAL CONTRACTOR: ROOFING CONTRACTOR: ROOFING CONTRACTOR: OTHER: iffication RECOMMENDED AWARD RECOMMENDED AWARD RECOMMENDED AWARD RECOMMENDED AWARD RECOMMENDED AWARD RECOMMENDED AWARD RECOMMENDED AWARD	S. Click the Export Report Patter G. Click the Download button to "*REPORTED PROJECT SCHEDULE** ""	n (to the right of the blue flappy of a save the report to be uploaded in f the company name in the	Company box - Click the FILTER GC UNDER S4M TRUCTION COST: k MAINTENANCE: MECHANICAL CONTRACTOR: RE CONTRACTOR:	button - Click on the comp
will be listed. oject Information PROJECT PRIORITY: PROJECT PRIORITY: PROJECT NUMBER: REQUISTER NAME: BUILDING LIAISON: BUILDING NUMBER: ROOM NUMBER(S): ************************************	PROJECT M PROJECT DESC PRINCIPAL INVES DEPAI ST JOHNIN R GENERATO R UMPC RI HVAC EVAI HVAC EVAI COMMISSIONIN RI acters of the company name in the Company CIVIL EI LANDSCAPE AR	DATE: ANAGER: RIPTION: TIGATOR: RTMENT: S PERMIT R PERMIT R PERMIT R PERMIT R QUIRED: G AGENT EQUIRED: G AGENT EQUIRED: S QUIRED: CHITECT:		Con Look For a El L	firmation Statement BUDGET AND SCHEDULE CONFIRMATION: tractor Selection up] instructions - Click [Looks of the company identified GC UNDER SSOOK CONSTRUCTION COST: CONSTRUCTION COST: CONSTRUCTION COST: LECTRICAL CONTRACTOR: ROOFING CONTRACTOR: ROOFING CONTRACTOR: RECOMMENDED AWARD RELADDED AWARD RECOMMENDED AWARD RECOMMENDED AWARD RECOMMENDED AWARD RECOMMENDED AWARD METHOD: PM RECOMMENDATION: ASSOCIATE DIRECTOR	S. Click the Export Report Patter G. Click the Download button to "*REPORTED PROJECT SCHEDULE** ""	n (to the right of the blue flappy of a save the report to be uploaded in f the company name in the 	Company box - Click the FILTER GC UNDER S4M TRUCTION COST: & MAINTENANCE: MECHANICAL CONTRACTOR: DC CONTRACTOR: DC ONTRACTOR: DC ONTRACTOR: DC ONTRACTOR: DC ONTRACTOR: DC ONTRACTOR:	button - Click on the comp
will be listed. oject Information PROJECT PRIORITY: PROJECT PRIORITY: PROJECT NUMBER: REQUISTER NAME: BUILDING LIAISON: BUILDING NUMBER: ROOM NUMBER(S): ************************************	PROJECT M PROJECT DESC PRINCIPAL INVES DEPAI ST JOHNIN R GENERATO R UMPC RI HVAC EVAI HVAC EVAI COMMISSIONIN RI acters of the company name in the Company CIVIL EI LANDSCAPE AR	DATE: ANAGER: RIPTION: TIGATOR: RTMENT: S PERMIT R PERMIT R PERMIT R PERMIT R QUIRED: G AGENT EQUIRED: G AGENT EQUIRED: S QUIRED: CHITECT:		Con Look For a El L	firmation Statement BUDGET AND SCHEDULE CONFIRMATION: tractor Selection up) Instructions - Click [Looka of the company identified GC UNDER STORK GC UNTRACTOR: CONTRUCTION COST: LECTRICAL CONTRACTOR: ROOFING CONTRACTOR: ROOFING CONTRACTOR: OTHER: ification RECOMMENDATION OF AWARD: REASONING FOR RECOMMENDED AWARD METHOD: YOVAL PM RECOMMENDATION:	S. Click the Export Report Patter G. Click the Download button to "*REPORTED PROJECT SCHEDULE** ""	n (io the right of the blue flappy of the blue flappy of a save the report to be uploaded in f the company name in the	Company box - Click the FILTER GC UNDER SAM TRUCTION COST: & MAINTENANCE: MECHANICAL CONTRACTOR: D CONTRACTOR: D CONTRACTOR:	button - Click on the comp



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 Information



Dashboard Projects Processes Documents Calendar Contacts Bidding Schedule ÷ Forms Cost Reports h Support: **Notes and Comments:** 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