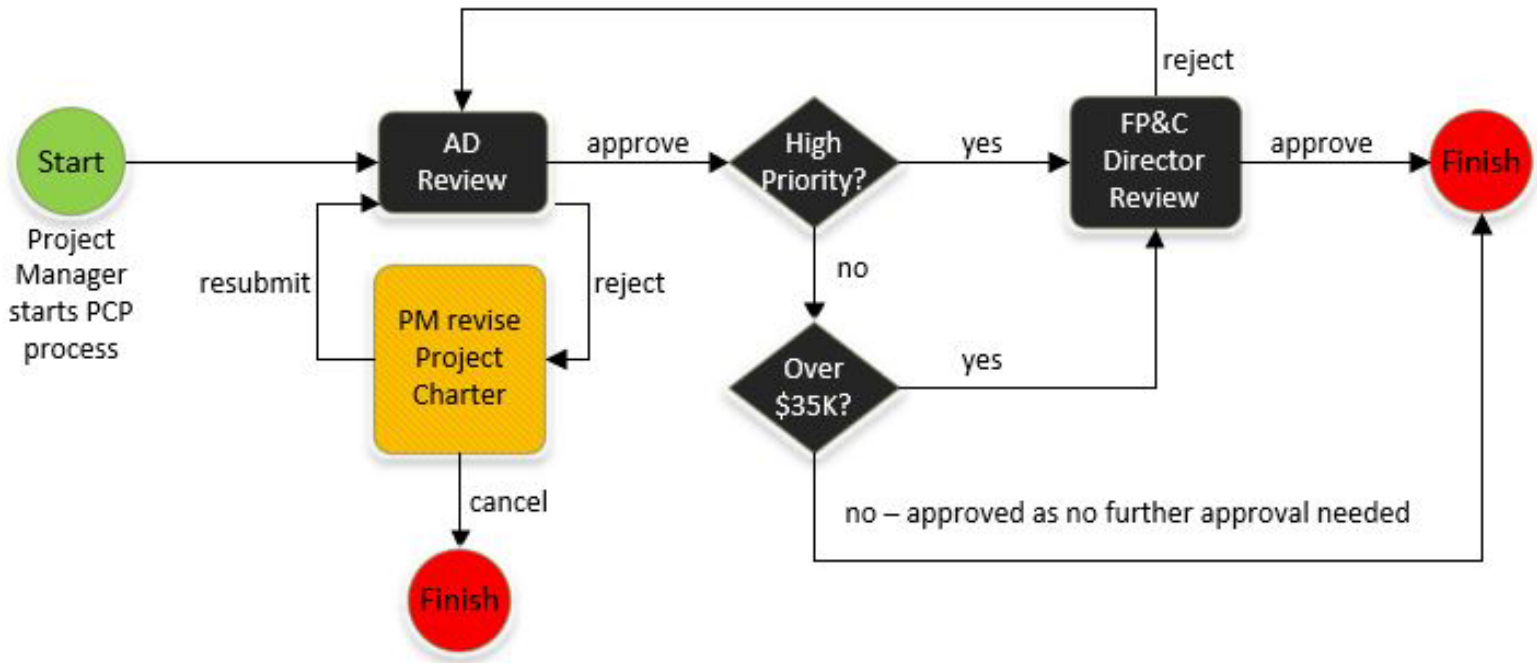




A Guide On Project Charter Process (PCP)

*Prepared by UCF FP&C
7 May 2019*

PCP – PROJECT CHARTER PROCESS



LEGEND

Process Description:

The purpose of the Project Charter process is to review and approve project requests, identify configurations in e-Builder, assign participants (staffing), identify milestones, enter and approve the initial Budget (ROM).

This process is initiated only by the Project Manager.

Process Participants:

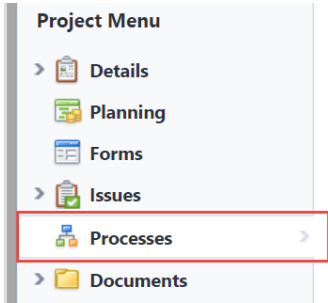
1. Project Manager
2. Assistant Director
3. Director

Process Details:

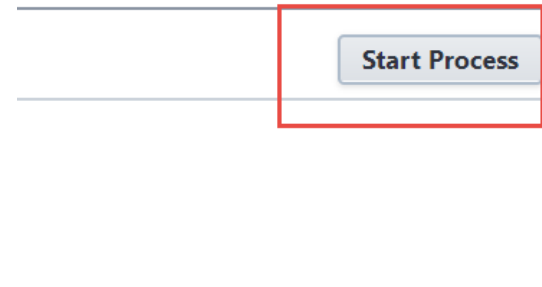
1. Process is initiated by the Project Manager.
 1. Data Field Assignments on "Submit" action: e-Builder reads the value from the Assignment Expression and stores it in a process data field. For example, row 1 of the table below, e-builder reads the value from the project custom field "Project ID" and stores it the process data field "PROJECT NUMBER".
2. The Associate/Assistant Director receives and reviews the information and can take the following actions:
 1. Approved. To Conditional. Process routes to "High Priority 1/2" conditional to evaluate the priority of the project. If the priority is either Emergency or Urgent, process routes to "Director Review" step; otherwise, process routes to "<35K?" conditional to evaluate if the estimated cost of the project is less than \$35,000. If project is not an Emergency/Urgent and less than \$35,000, process completes; otherwise, process routes to "Director Review" step. Status of process: Leave Status Unchanged.
3. Initiator resubmit - Project Manager receives the workflow and make the changes required in the comments tab.
4. Director receives the workflow and reviews the information submitted by the PM and reviewed by the AD.
5. Finish, process completes

Initiation of Process:

1. Select the project you wish to start the process in
2. Select **Processes** from the Project Menu.



3. Select **Start Process** in the process Module.



4. Click **Project Charter Process (PCP)** button.

Processes		Cancel
Process Name	Description	
02 - Project Charter Process (PCP)	This process is for reviewing/approving project requests, identifying configurations in e-Builder, assigning participants (staffing), identify milestones, entering and approving the initial budget (ICM), etc.	

Start/Initiator Review:

1. Initiate process within specific project and read prompts

02 - Project Charter Process (PCP) All Fields View Instructions

Project:	02 - Project Charter Process	Overall Due Date:	
Process Document:		Step Due Date:	
Current Workflow Step:			
* Subject:	<input type="text"/>		
Tracking Prefix:	<input type="text"/>		
Status:			

IMPORTANT!!

PROJECT INFORMATION MUST BE UP-TO-DATE

Please ensure ALL information on the Project Details page is up-to-date before submitting this process

Upload all pictures to the [Attached Documents] tab

2. Scroll and complete the necessary details. Required fields will have a red asterisk (*) and the process cannot be submitted until all required fields have been completed. Instructions are listed on the screen

* PROJECT PRIORITY: <input type="text"/>	DATE: <input type="text"/>
PROJECT NUMBER: <input type="text"/>	PROJECT MANAGER: <input type="text"/>
ESTIMATED PROJECT TIME: <input type="text"/>	* ESTIMATED PROJECT COST: <input type="text"/>
REQUESTER NAME: <input type="text"/>	PROJECT FULLY FUNDED: <input type="text"/>
BUILDING LIAISON: <input type="text"/>	FUNDING SOURCE: <input type="text"/>
PRINCIPAL INVESTIGATOR: <input type="text"/>	ACCOUNT NUMBER (IF KNOWN): <input type="text"/>
DEPARTMENT: <input type="text"/>	PROJECT BUDGET (PER REQUESTER): <input type="text"/>
BUILDING NUMBER: <input type="text"/>	MAJOR OR MINOR PROJECT: <input type="text"/>
ROOM NUMBER(S): <input type="text"/>	ESTIMATED PROJECT COST RANGE: <input type="text"/>
TYPE OF PROJECT: <input type="text"/>	RESEARCH EQUIPMENT INSIDE ROOM: <input type="text"/>
CHANGE OF SPACE TYPES: <input type="text"/>	RESEARCH EQUIPMENT OUTSIDE ROOM: <input type="text"/>
CHANGE OF ROOM NUMBER(S): <input type="text"/>	HAZARDOUS MATERIALS: <input type="text"/>
CHANGE OF OCCUPANCY COUNTY: <input type="text"/>	FURNITURE: <input type="text"/>
INCREASE OF ELECTRICAL CAPACITY: <input type="text"/>	SPACE SHARED? IF YES, DESCRIBE ABOVE: <input type="text"/>
INCREASE OF MECHANICAL CAPACITY: <input type="text"/>	PROJECT DEADLINE: <input type="text"/>

3. Select necessary companies/persons from lookup fields

* PROJECT PRIORITY: <input type="text"/>	DATE: <input type="text"/>
PROJECT NUMBER: <input type="text"/>	PROJECT MANAGER: <input type="text"/>
ESTIMATED PROJECT TIME: <input type="text"/>	* ESTIMATED PROJECT COST: <input type="text"/>
REQUESTER NAME: <input type="text"/>	PROJECT FULLY FUNDED: <input type="text"/>
BUILDING LIAISON: <input type="text"/>	FUNDING SOURCE: <input type="text"/>
PRINCIPAL INVESTIGATOR: <input type="text"/>	ACCOUNT NUMBER (IF KNOWN): <input type="text"/>
DEPARTMENT: <input type="text"/>	PROJECT BUDGET (PER REQUESTER): <input type="text"/>
BUILDING NUMBER: <input type="text"/>	MAJOR OR MINOR PROJECT: <input type="text"/>
ROOM NUMBER(S): <input type="text"/>	ESTIMATED PROJECT COST RANGE: <input type="text"/>
TYPE OF PROJECT: <input type="text"/>	RESEARCH EQUIPMENT INSIDE ROOM: <input type="text"/>
CHANGE OF SPACE TYPES: <input type="text"/>	RESEARCH EQUIPMENT OUTSIDE ROOM: <input type="text"/>
CHANGE OF ROOM NUMBER(S): <input type="text"/>	HAZARDOUS MATERIALS: <input type="text"/>
CHANGE OF OCCUPANCY COUNTY: <input type="text"/>	FURNITURE: <input type="text"/>
INCREASE OF ELECTRICAL CAPACITY: <input type="text"/>	SPACE SHARED? IF YES, DESCRIBE ABOVE: <input type="text"/>
INCREASE OF MECHANICAL CAPACITY: <input type="text"/>	PROJECT DEADLINE: <input type="text"/>

4. Generate and attach reports per prompts

PROJECT COST REPORT (an Approved 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:

- Run the below report by clicking on the link
- Click the [X] on the drop-down menu to select your project (next to the [Equal To] drop-down menu)
- Select your project from the list
- Click the [OK] button to run the report
- Click the Export Report button (to the right of the blue floppy disk)
- Click the Download button to save the report to your computer and upload it into the PROJECT COST field below.

"REPORTED PROJECT COST"

PROJECT COST (update cost report here)

* PROJECT COST: Drop and drop file here or [Browse e-Builder](#) [Browse Computer](#)

PROJECT TIME REPORT (an Activated schedule must be in place before running the report, otherwise no data will appear)

Project Time Report: To generate the Time report, do the following:

- Run the below report by clicking on the link
- Click the [X] on the drop-down menu (next to the [Equal To] drop-down menu)
- Select your project from the list
- Click the [OK] button to run the report
- Click the Export Report button (to the right of the blue floppy disk)
- Click the Download button to save the report to be uploaded into the field below.

"REPORTED PROJECT TIME"

PROJECT SCHEDULE (upload schedule report here)

* PROJECT TIME: Drop and drop file here or [Browse e-Builder](#) [Browse Computer](#)

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

PERMITTING

BCO PERMIT REQUIRED: ST ZONING PERMIT REQUIRED:

SM PERMIT REQUIRED: GENERATOR PERMIT REQUIRED:

BIDDING/AWARD/CONSTRUCTION

Bidding Instructions:

- Click [OK]
- Click the [X] on the drop-down menu to select your project (next to the [Equal To] drop-down menu)
- Click the [OK] button to run the report
- Click the Export Report button (to the right of the blue floppy disk)
- Click the Download button to save the report to be uploaded into the field below.

RECOMMENDED AWARD METHOD: <input type="text"/>	ELECTRICAL CONTRACTOR: <input type="text"/>
UC UNDER FIRM CONSTRUCTION COST: <input type="text"/>	MECHANICAL CONTRACTOR: <input type="text"/>
SC UNDER XSM CONSTRUCTION COST: <input type="text"/>	ROOFING CONTRACTOR: <input type="text"/>
CM UNDER XSM CONSTRUCTION COST: <input type="text"/>	TREE CARE CONTRACTOR: <input type="text"/>
REPAIR & MAINTENANCE: <input type="text"/>	TURF FIELD CONTRACTOR: <input type="text"/>
LANDSCAPE CONTRACTOR: <input type="text"/>	OTHER: <input type="text"/>

APPROVAL

PM RECOMMENDATION: <input type="text"/>	PM APPROVAL DATE: <input type="text"/>
ASSOCIATE DIRECTOR APPROVAL: <input type="text"/>	ASSOCIATE DIRECTOR APPROVAL DATE: <input type="text"/>
DIRECTOR APPROVAL: <input type="text"/>	DIRECTOR APPROVAL DATE: <input type="text"/>
DCOM APPROVAL: <input type="text"/>	DCOM APPROVAL DATE: <input type="text"/>
AVP APPROVAL: <input type="text"/>	AVP APPROVAL DATE: <input type="text"/>

AD Review:

1. Filter process instances by project and select desire instance

Filter Instances Cancel

Status: Draft Open Finished

Step Name:

Containing Text:

Filter

Project: Show All Page 1 of 1 Show 25 Delete Instance

Project	Process	Subject	Status	Step	In Step Since	Date Created	Created By
<input type="checkbox"/> Classroom Seating	PCP - 3	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

Pictures are located under the (Attached Document) tab, if applicable.

PROJECT PRIORITY:	DATE:
PROJECT NUMBER:	PROJECT MANAGER:
ESTIMATED PROJECT TIME:	ESTIMATED PROJECT COST:
REQUESTER NAME:	PROJECT FULLY FUNDED:
BUILDING LIAISON:	FUNDING SOURCE:
PRINCIPAL INVESTIGATOR:	ACCOUNT NUMBER (IF KNOWN):
DEPARTMENT:	PROJECT BUDGET (PER REQUESTER):
BUILDING NUMBER:	MAJOR OR MINOR PROJECT:
ROOM NUMBER(S):	ESTIMATED PROJECT COST RANGE:
TYPE OF PROJECT:	RESEARCH EQUIPMENT INSIDE ROOM:
CHANGE OF SPACE TYPES:	RESEARCH EQUIPMENT OUTSIDE ROOM:
CHANGE OF ROOM NUMBERS:	HAZARDOUS MATERIALS:

3. Select necessary companies/persons from lookup fields

PROJECT PRIORITY: <input type="text" value="-- Please select an option --"/>	DATE: <input type="text"/>
PROJECT NUMBER:	PROJECT MANAGER:
ESTIMATED PROJECT TIME:	ESTIMATED PROJECT COST:
REQUESTER NAME:	PROJECT FULLY FUNDED: <input type="text" value="-- Please select an option --"/>
BUILDING LIAISON:	FUNDING SOURCE: <input type="text" value="-- Please select an option --"/>
PRINCIPAL INVESTIGATOR:	ACCOUNT NUMBER (IF KNOWN): <input type="text"/>
DEPARTMENT:	PROJECT BUDGET (PER REQUESTER): <input type="text"/>
BUILDING NUMBER:	MAJOR OR MINOR PROJECT: <input type="text" value="-- Please select an option --"/>
ROOM NUMBER(S):	ESTIMATED PROJECT COST RANGE: <input type="text" value="-- Please select an option --"/>
TYPE OF PROJECT: <input type="text" value="-- Please select an option --"/>	RESEARCH EQUIPMENT INSIDE ROOM: <input type="text" value="-- Please select an option --"/>
CHANGE OF SPACE TYPES: <input type="text" value="-- Please select an option --"/>	RESEARCH EQUIPMENT OUTSIDE ROOM: <input type="text" value="-- Please select an option --"/>
CHANGE OF ROOM NUMBERS: <input type="text" value="-- Please select an option --"/>	HAZARDOUS MATERIALS: <input type="text" value="-- Please select an option --"/>
CHANGE OF OCCUPANCY COUNTY: <input type="text" value="-- Please select an option --"/>	FURNITURE: <input type="text" value="-- Please select an option --"/>
INCREASE OF ELECTRICAL CAPACITY: <input type="text" value="-- Please select an option --"/>	SPACE SHARED? IF YES, DESCRIBE ABOVE: <input type="text" value="-- Please select an option --"/>
INCREASE OF MECHANICAL CAPACITY: <input type="text" value="-- Please select an option --"/>	PROJECT DEADLINE: <input type="text"/>

4. Generate and attach reports per prompts

PROJECT COST REPORT (an Approved budget must be in place before running the report, otherwise no data will appear)

To generate the Cost report, do the following:

1. Run the below report by clicking on the link
2. Click the [X] on the drop-down menu to select your project (next to the (Equal To) drop-down menu)
3. Select your project from the list
4. Click the (OK) button to run the report
5. Click the Export Report button on the right of the blue floppy disk
6. Click the Download button to save the report to your computer and upload it into the PROJECT COST field below.

"REPORTED PROJECT COST"

PROJECT COST (update cost report here)

PROJECT COST: or

PROJECT TIME REPORT (an Activated schedule must be in place before running the report, otherwise no data will appear)

To generate the Time report, do the following:

1. Run the below report by clicking on the link
2. Click the [X] on the drop-down menu (next to the (Equal To) drop-down menu)
3. Select your project from the list
4. Click the (OK) button to run the report
5. Click the Export Report button on 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 TIME"

PROJECT SCHEDULE (upload schedule report here)

PROJECT TIME: or

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

PERMITTING

BCO PERMIT REQUIRED:

SPM PERMIT REQUIRED:

S1 ZONING PERMIT REQUIRED:

GENERATOR PERMIT REQUIRED:

BIDDING/AWARD/CONSTRUCTION

Send to:

1. Click (Send)
2. Type the email addresses of the recipient(s) in the To: recipient box.
3. Click the (OK) button.
4. Click the (OK) button to save the report to be uploaded into the field below.

RECOMMENDED AWARD METHOD:

UC UNDER FIRM CONSTRUCTION COST: <input type="text" value="Send"/>	ELECTRICAL CONTRACTOR: <input type="text" value="Send"/>
UC UNDER XCM CONSTRUCTION COST: <input type="text" value="Send"/>	MECHANICAL CONTRACTOR: <input type="text" value="Send"/>
CM UNDER XCM CONSTRUCTION COST: <input type="text" value="Send"/>	ROOFING CONTRACTOR: <input type="text" value="Send"/>
REPAIR & MAINTENANCE: <input type="text" value="Send"/>	TREE CARE CONTRACTOR: <input type="text" value="Send"/>
LANDSCAPE CONTRACTOR: <input type="text" value="Send"/>	TURF FIELD CONTRACTOR: <input type="text" value="Send"/>
	OTHER: <input type="text"/>

APPROVAL

PM RECOMMENDATION:	PM APPROVAL DATE:
ASSOCIATE DIRECTOR APPROVAL:	ASSOCIATE DIRECTOR APPROVAL DATE:
DIRECTOR APPROVAL:	DIRECTOR APPROVAL DATE:
DCOM APPROVAL:	DCOM APPROVAL DATE:
AVP APPROVAL:	AVP APPROVAL DATE:

Director Review:

1. Filter process instances by project and select desire instance

Filter Instances Cancel

Status: Draft Open Finished

Step Name:

Containing Text:

Filter

Project: Show All Page of 1 Show Delete Instance

Project	Process	Subject	Status	Step	In Step Since	Date Created	Created By
<input type="checkbox"/> Classroom Seating	PCP - 3	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

Pictures are located under the (Attached Document) tab, if applicable.

PROJECT PRIORITY:	DATE:
PROJECT NUMBER:	PROJECT MANAGER:
ESTIMATED PROJECT TIME:	ESTIMATED PROJECT COST:
REQUESTER NAME:	PROJECT FULLY FUNDED:
BUILDING LIAISON:	FUNDING SOURCE:
PRINCIPAL INVESTIGATOR:	ACCOUNT NUMBER (IF KNOWN):
DEPARTMENT:	PROJECT BUDGET (PER REQUESTER):
BUILDING NUMBER:	MAJOR OR MINOR PROJECT:
ROOM NUMBERS:	ESTIMATED PROJECT COST RANGE:
TYPE OF PROJECT:	RESEARCH EQUIPMENT INSIDE ROOM:
CHANGE OF SPACE TYPES:	RESEARCH EQUIPMENT OUTSIDE ROOM:
CHANGE OF ROOM NUMBERS:	HAZARDOUS MATERIALS:

3. Review project information in project details vs. project information

PROJECT INFORMATION (**Please ensure all information on the Project Details page is up to date before starting this process**)

PROJECT PRIORITY:	DATE:
PROJECT NUMBER:	PROJECT MANAGER:
ESTIMATED PROJECT TIME:	ESTIMATED PROJECT COST:
REQUESTER NAME:	PROJECT FULLY FUNDED:
BUILDING LIAISON:	FUNDING SOURCE:
PRINCIPAL INVESTIGATOR:	ACCOUNT NUMBER (IF KNOWN):
DEPARTMENT:	PROJECT BUDGET (PER REQUESTER):
BUILDING NUMBER:	MAJOR OR MINOR PROJECT:
ROOM NUMBERS:	ESTIMATED PROJECT COST RANGE:
TYPE OF PROJECT:	RESEARCH EQUIPMENT INSIDE ROOM:
CHANGE OF SPACE TYPES:	RESEARCH EQUIPMENT OUTSIDE ROOM:
CHANGE OF ROOM NUMBERS:	HAZARDOUS MATERIALS:
CHANGE OF OCCUPANCY COUNT:	FURNITURE:
INCREASE OF ELECTRICAL CAPACITY:	SPACE SHARED? IF YES, DESCRIBE ABOVE:
INCREASE OF MECHANICAL CAPACITY:	PROJECT DEADLINE:

4. Approvals will be automatically captured and assigned in process

PERMITTING

ECO PERMIT REQUIRED:

ST JOHN'S PERMIT REQUIRED:

SFM PERMIT REQUIRED:

GENERATOR PERMIT REQUIRED:

BIDDING/AWARD/CONSTRUCTION

[Link] Instructions

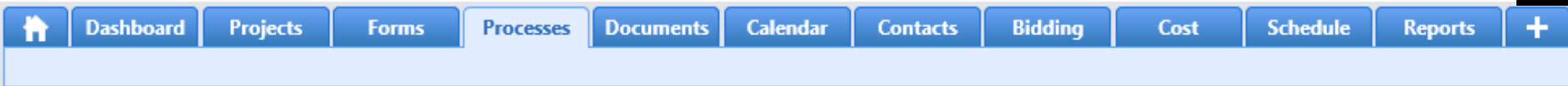
- Click [Link]
- Type the first 3 characters of the company name in the Company box
- Click the FILTER button
- Click on the company name of the company identified

RECOMMENDED AWARD METHOD:

GC UNDER \$50K CONSTRUCTION COST: <input type="text" value="[Link]"/>	ELECTRICAL CONTRACTOR: <input type="text" value="[Link]"/>
CM UNDER \$2M CONSTRUCTION COST: <input type="text" value="[Link]"/>	MECHANICAL CONTRACTOR: <input type="text" value="[Link]"/>
REPAIR & MAINTENANCE: <input type="text" value="[Link]"/>	ROOFING CONTRACTOR: <input type="text" value="[Link]"/>
LANDSCAPE CONTRACTOR: <input type="text" value="[Link]"/>	TREE CARE CONTRACTOR: <input type="text" value="[Link]"/>
	TURF FIELD CONTRACTOR: <input type="text" value="[Link]"/>
	OTHER: <input type="text"/>

APPROVAL

PM RECOMMENDATION:	PM APPROVAL DATE:
ASSOCIATE DIRECTOR APPROVAL:	ASSOCIATE DIRECTOR APPROVAL DATE:
DIRECTOR APPROVAL:	DIRECTOR APPROVAL DATE:
GC/CM APPROVAL:	GC/CM APPROVAL DATE:
AVP APPROVAL:	AVP APPROVAL DATE:



Project:	Classroom Seating 1		
Process Document:	PCP - 3 Show History Current Actors 2	Overall Due Date: 6	
Current Workflow Step:	Finish Show Workflow Diagram 3	Step Due Date: 7	
Subject:	Project Charter for Classroom Seating Priority 3 - Expedite 4 (education/improvements) Project Cost 24000		
Status:	Submitted 5		

Process Description:

Each time you open a process to perform your function within a project, you will see the Process Header. The process header contains information that can help you identify where you are within a process, within a project.

1. **Project:** Project Name
2. **Process Document:** The process instance
 - [Show History](#): Will display a historical list of actions taken within this process instance
 - [Current Actors](#): Will display a list of actors responsible for the process in its current step
3. **Current Workflow Step:** The name of the current step
 - [Show Workflow Diagram](#): Will display the workflow diagram, highlighting the current step where this instance is with a blue frame
4. **Subject:** Displays the specific process instance subject
5. **Status:** Displays the process' current status
6. **Overall Due Date:** Date the process needs to be completed by *(If applicable)*
7. **Step Due Date:** Date this step in the process needs to be completed by *(If applicable)*

Support:

Announcements ▾

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

Notes and Comments: