A Guide On
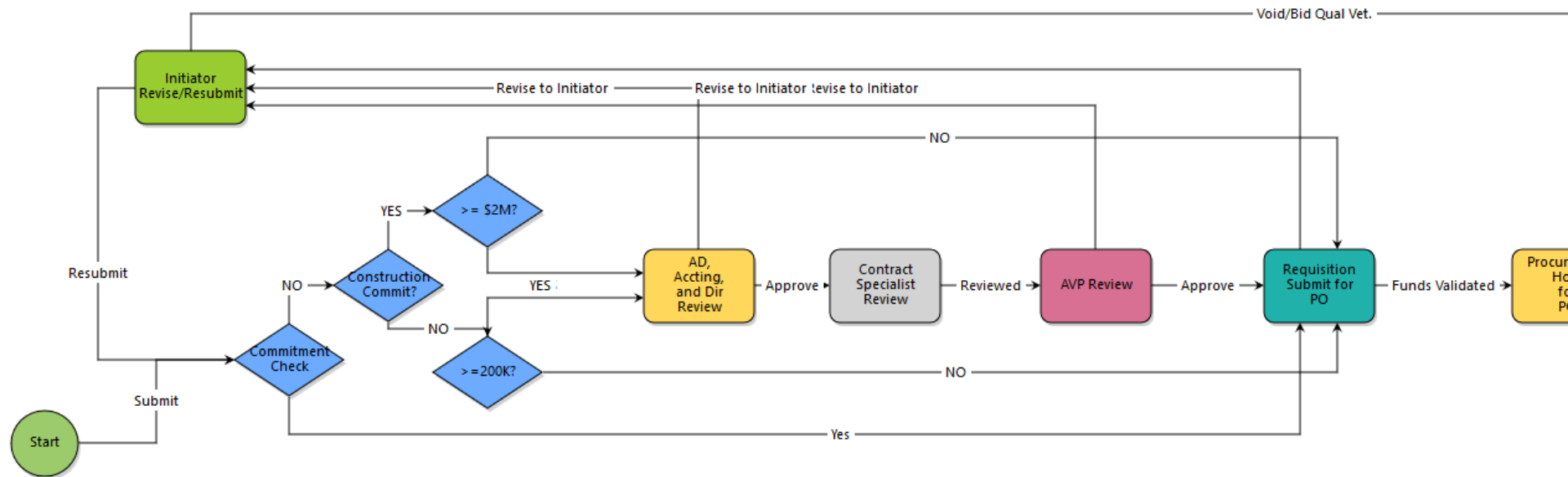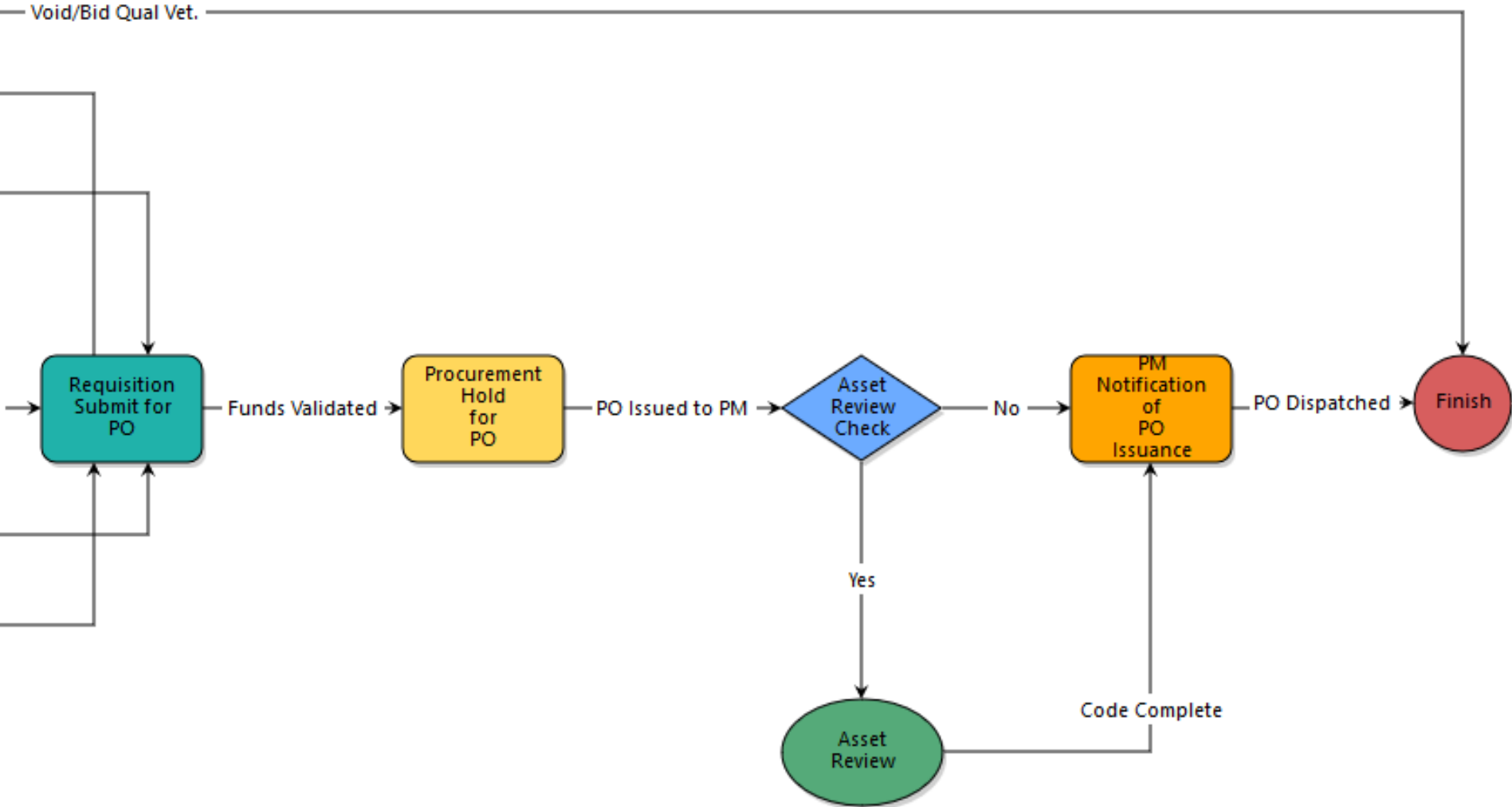
Commitment Approval (CA) Process

Prepared by UCF / e-Builder
14 February 2022

Commitment Approval (CA) Process

Void/Bid Qual Vet.

Requisition Submit for PO → Funds Validated → Procurement Hold for PO → PO Issued to PM → Asset Review Check → No → PM Notification of PO Issuance → PO Dispatched → Finish

Asset Review Check → Yes → Asset Review → Code Complete → PM Notification of PO Issuance

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Commitment Approval (CA) Process

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Process Description:

The Commitment Approval (CA) workflow process allows commitments to be reviewed and approved by the appropriate parties, using the structured workflow defined in this document. By moving their existing commitment process into e-Builder, UCF will benefit from more streamlined efficiency, reduce email updates, and provide for greater visibility.

Process Participants:

1. Project Manager (PM)
2. Director
3. Associate/Assistant Director
4. AVP
5. Contract Specialist
6. Accounting Supervisor
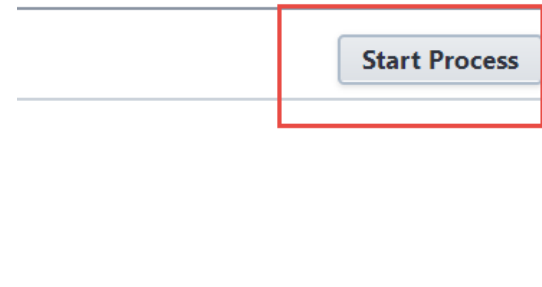7. FSBO Support

Process Details:

1. After confirming with the client on fees and funds, the Project Manager (PM) will create the commitment and submit it for review.

2. e-Builder validates the Commitment Type and the current contract value. Based on the predetermined conditions the commitment is routed to Director, Accounting Supervisor, Associate/Assistant Director, Contract Specialist, AVP review step or directly to the Accounting Supervisor Review step.

3. Director, Accounting Supervisor, Associate/Assistant Director (AD/Acct/Dir Review) each review the commitment and has to approve to AVP. If one of the reviewers wants to send back to the PM, it will go back to the PM for revisions.

4. The Contract Specialist receives the process in their court, reviews the information, will use Cobblestone (DocuSign) to get signatures. Once the Contract Specialist uploads the signed contract, and actioned the process as Commitment Ready, the process will route to the AVP for review.

5. The AVP receives the process in their court, reviews the information and can send back to the PM if any updates are required or move the process forward to the Accounting Supervisor by actioning the process as Approve Commitment.

6. The Accounting Supervisor receives the process in their court, checks if the budget is sufficient (increase if necessary), validates the information in PeopleSoft, and can either send back to the PM to revise or move forward by actioning the process as Funds Validated. The PM is notified with the PO is issued.
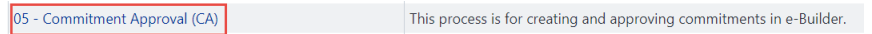
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Initiation of Process:

1. Select specific project to start the Commitment Approval Process.

2. Select **Processes** from the Project Menu.

Project Menu
- › Details
- Planning
- Forms
- › Issues
- Processes ›
- › Documents
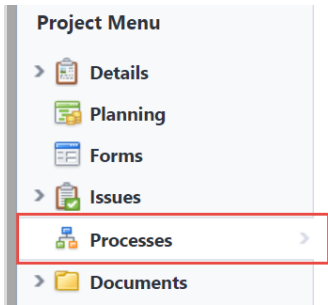
3. Select **Start Process** in the process Module.

Start Process

4. Click **Commitment Approval** button.

| 05 - Commitment Approval (CA) | This process is for creating and approving commitments in e-Builder. |

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Project Manager Input:

1. Click process name to open Commitment Approval.

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.

Add New Commitment Item

Item Number	001
Budget Line Item	Please Select a Line Item
Current Budget	
Description	
Retainage Percent	0.0
Amount	0.00
Allowance Item?	☐
Custom Fields	📇

Add

3. Select an action and click **Take Action** button to move process along; possible actions are:

   a. **Submit** – Select this action if all information is entered and process is ready to move forward.

e-Builder

05 - Commitment Approval (CA) — Instructions

Start Process — Print | Check Spelling | **Submit** | Save Draft | Cancel

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AD/Acct/Dir Review:

1. Click process name to open Commitment Approval.

2.

3. Scroll to review 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.

3. Select an action and click **Take Action** button to move process along; possible actions are:

   a. **Approve to AVP** – Select this action if all information is correct and process is ready to move forward.

   b. **Revise to Initiator** – Select this action if after reviewing the information entered, the process needs to get sent back to the Initiator to make updates. Comments will be required upon taking this action

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Initiator Revise:

1. Click process name to open Commitment Approval.

2. Review comments by selecting the **Comments** tab.

3. 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.

4. Select an action and click **Take Action** button to move process along; possible actions to take are:

   a. **Resubmit** – Take this action once all comments have been addressed and all information in the process has been updated accordingly.

   b. **Void** – Process is no longer needed and routes to finish in a Void status.

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Contract Specialist Review:

1. Click process name to open Commitment Approval.

2. Review the information, use Cobblestone (DocuSign) to get signatures, and upload the signed contract. Required fields will have a red asterisk (*) and the process cannot be submitted until all required fields have been completed.

Please upload the signed contract from Cobblestone in to the Executed Contract field.

FP&C Project Number:
Building Permit Number:
Date of Proposal:
Scope of Work:
Vendor's Proposal:

Please add the contractor's proposal.
Naming Standard: Proposal_Project Number_Vendor's Name_YYYYMMDD - Example: Proposal_21123001_RCG_20210429

SFM Permit Number:
Project Manager:
Project Manager e-Mail:
* Executed Contract: Drag and drop file here or Browse e-Builder Browse Computer
Contract Selection Method:
Asset Review Required:

Select "Yes" if the purchase order should be sent to the Asset Management team for review of assets to be demolished, removed or replaced. Please refer to the first page of the Project Asset Table to view example asset types.

3. Select an action and click **Take Action** button to move process along; possible actions are:

    a. **Commitment Ready** – Select this action if all information is entered and process is ready to move forward.

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AVP Review:

1. Click process name to open Commitment Approval.

2. Review the following information:

3. Select an action and click **Take Action** button to move process along; possible actions are:

   a. **Approve Commitment**– Select this action if all information is entered and process is ready to move forward.

   b. **Revise to Initiator -** Select this action if after reviewing the information entered, the process needs to get sent back to the Initiator to make updates. Comments will be required upon taking this action

Requisition Submit for PO:

1. Click process name to open Commitment Approval.

2. Review to ensure that the budget is sufficient (increase if necessary) and validate the information in PeopleSoft. Required fields will have a red asterisk (*) and the process cannot be submitted until all required fields have been completed.

3. Select an action and click **Take Action** button to move process along; possible actions are:

   a. **Funds Validated** – Select this action if all information is entered and process is ready to move forward.

   b. **Revise to Initiator -** Select this action if after reviewing the information entered, the process needs to get sent back to the Initiator to make updates. Comments will be required upon taking this action

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Procurement Hold for PO:

1. Click process name to open Commitment Approval.

2. Review to ensure that the budget is sufficient (increase if necessary) and validate the information in PeopleSoft. Required fields will have a red asterisk (*) and the process cannot be submitted until all required fields have been completed.

3. Select an action and click **Take Action** button to move process along; possible actions are:

   a. **Funds Validated** – Select this action if all information is entered and process is ready to move forward.

   b. **Revise to Initiator -** Select this action if after reviewing the information entered, the process needs to get sent back to the Initiator to make updates. Comments will be required upon taking this action

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PM Notification of PO Issuance:

1. Click process name to open Commitment Approval.

2. Review to ensure that the budget is sufficient (increase if necessary) and validate the information in PeopleSoft. Required fields will have a red asterisk (*) and the process cannot be submitted until all required fields have been completed.

3. Select an action and click **Take Action** button to move process along; possible actions are:

   a. **PO Dispatched** – Select this action if all information is entered and process is ready to move forward.

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. **Project Number:** Displays the project number

7. **Overall Due Date:** Date the process needs to be completed by *(If applicable)*

8. **Step Due Date:** Date this step in the process needs to be completed by *(If applicable)*

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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