

A Guide On Substantial Completion(SC)

Prepared by e-Builder 9th February 2018





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Dashboard

Calendar

Documents

Process Description:

Projects

The purpose of the Substantial Completion process is to track and collect all documentation including but not limited to letters, certificates, punch-list, and O&M required to reach Substantial Completion. This process is initiated by GC (Primary, Secondary, Tertiary), or Project Manager. The routing of the process assures that Project Manager, Architect, Associate/Assistant Director, an Director have reviewed the information before officially declaring Substantial Completion.

Forms

Processes

Process Participants:

- 1. GC Primary
- 2. GC Secondary
- 3. GC Tertiary
- 4. PM Project Manager

Process Details:

Contacts

Bidding

1. After the submission of the Substantial Completion the process will route to the PM for review.

Cost

Schedule

- 2. The Architect / Engineer (AE) will review the information and will send it back to the initiator for revise with comment or approve the information and move the process forward.
- 3. The Project Manager (PM) will review the process and approve the process for further review. The PM can also send the process back to the initiator wit comment.
- 4. The PM will review the process for one final review and approve the process to move forward.
- 5. The Associate Director will review the process and either revise back to the PM with comments if necessary or approve the information provided and push the process forward.
- 6. The F&S Directors will review the process and revise back to the PM with comment or approve and complete the process.



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Substantial Completion Process (SC)

Documents Dashboard Processes Calendar Projects Contacts Bidding Cost Schedule Forms Reports **GC/PM Input:** Note: Items above this note must be completed to receive TCO. Items below the line are required for Close Out and Substantial Completion. 1. Click process name to open Substantial Completion SC. The Ac-Built Set of documents has been provided by the Contractor to • control of the experiment of the experiment of the Control of A: Built The Archited Engineer (ArE) for production of the final Record Set of occurrents, include a MEM or enablem the Ard, indicating that he or she has received the Contractor's An Duit Set and has begun the creation Set and has began the cre Drug and drop file here Processes Reports (0) cr Browse e-Builder Bronse Computer Completed Draft Operations and Maintenance (OBM) Manuals have been provide to UCF. The UCF #M will confirm receipt of Oder Monuals and that If ey have been turned ever to Facilities Operations for review. Process Subject Draft warranties have been provided to the Owner for review and acceptance of terms . Notuce a letter from the Contractor listing all draft warranties provided to UCP for review. The UCP PM wild confirm Weekpr at octar latter Esting of dicti work onties provided to UCF for review SC - 1 Substantial Completion Checklist and Approval for z - User Acceptance Testing (zzUAT) The UCT PM will confirm receipt of draft warrants or Browse e-Builder Branae Computer 48 lock cores have been changed from the construction master to University cores. Include a latter or email from the UCF Locksmith. Letter or email flors the UCF Lockumith, confirming that the change-out of lock contri la complete Scroll and complete the necessary details. Required fields will have a 2. confirming that the change-out of lock cases is complete. or Browsse-Suilder Bronse Computer red asterisk (*) and the process cannot be submitted until all required The final building cleaning has been completed by the Contractor. The UCF RM will confirm that the final building cleaning the base completed to the UCF RM's and UCF and user's satisfaction. fields have been completed. Arc Flash calculations have been completed and labels have been installed, include a inter hom the Express of Recard or Commissioning Agent, verying that Arc Flash consistions have been completed and labels have been installed. Ingineer of Pecord or Commis ing Agent letter verifying that Arc Flag or Browse e-Builder Brense Computer Print Process Document: 59 - Subdantial Completion Overall Dus Date Current Workflow Step Step Due Dete + Subject: Tracking Prefec Select an action and click **Submit** button to move process along; 3. Sec. 1 possible actions are: All of the following checklist requirements must be completed prior to Substantial Completion. a. Submit - Select this action if all information is entered and At UCF discretion (F&S AVP and BCO), partial completion of the checklist can allow issuance of Temporary Certificate of Occupancy. process is ready to move forward. • 1 The entire facility can be occupied and used for the purposes intended * Le Architect of Record's Substantial Completion Certificate solude a capy of the Architect of Record's Syladantics Complition te Brouss e-Bullder Browse Computer Completed O PATH All building inspections for code compliance have been completed and passed. Date Fire Mercal (Mc Serby inspections have applicable) new been completed add passed. The terms of all the safety spectrum (Fire alians, typicable, demonstor (Papplicable), fire Tang, and indica throngone's (McGino's System) is considered have the Constant's indicating which impedded users passing and enter dates that are used with the meeting. How there is the Constant's meeting which impedded users passing and enter dates the prime passes. These used with the meeting. The Paper passing and the dates of the same set of the same based of the meeting. How the dates are passed and the same set of the dates are based on the same set of the dates are based on the same set of the dates are based on the dates and the meeting. The dates are based on the dates are da actor letter indicating which impections were passed and on what dates they were period er Brouse e-Bullder Response Computer Cf Building Code Official Check Spelling Submit Start Process Print Save Draft Cancel endor impections have passed and contilicates have been issued. Nack a letter from the Contractor, indicating which impections very samed and on what sates they were period or Brunne e Bullder Completes Browne Computer The invoke system and the building Automotion systems (BAG) are complete and have been approved by the Engineer of Record and Commissioners Aparts induce a latter them to be degreen of theored and the Commuticeners approximations that MONE systems and BAS systems er of Record and the Commissioning Agent letter indicating the er Browes a Builder Breves Computer

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e-Builder, Substantial Completion Process (SC) Dashboard Projects Forms Processes Documents Calendar Contacts Bidding Cost

AE Review:

1. Click process name to open Substantial Completion.

Reports (0)
Subject

2. 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.

All of the following checklist requirements must be completed prior to Substantial Completion.

At UCF discretion (F&S AVP and BCO), partial completion of the checklist can allow issuance of Temporary Certificate of Occupancy.

P.	The entire faoility can be occupied and used for the purposes intended, include a copy of the Architect of Record's Subscontal Completion Gerafloote,	te .	Architect of Record's Substantial Completion Certificate
2	All bolding improvements for solve comparison have been compared and protect 100 mF for the solver includes application plane been compared and parents. The theoring of all insufficient guesters gives the solver insufficient applicable, the solver, and inform Entregrence in the fortune to the solver insufficient application application applicable associations and the solver the processing of the include AMP application. Set in solver building insurantics and any data inspection desired internative plane building insurantics and any data inspection desired internative plane data application applicable inspection desired internative plane data application applicable applicable and the solution insurantics. Set in solve the solution instruction of the data application applicable ap	24	Contractor Hater inducting which impections were passed and on what drive they were possed
3:	Elevator impections have passed and certificates have been issued. Include a tester fram the Contractor, indicating which inspections were passed and on what cases they were passed.	Ja	Contractor letter indicating which inspections were possed and on what date: they were passed
(A.	The HVAC system and the Evideling Automation Systems (EAC) are compared and have been approved by the Leganeer of Necost and Commissioning Apart. Include a leganet from the Anjoineer of Aecost and the Commissioning Apart, and/ording that HVAC systems and BAS systems are complete.	48	Engineer of Peoped and the Commissioning Agent letter indicating that WARC systems and BAS insteads are comparte
6	The Air-Built Bet of documents has been provided by the Contractor to the Archbact(Signeer AVI) for production of the final Record Set of documents. Include a later or email from the Ae Instatrupt dock to an documents. Include a later arcman share and the Set Set and an bages the outpine of the Aeroset Set and Set Set and Am bages the outpine dock and set of the Set Set Set Set Set Set Set Set Set Se	64	Art letter indicating that he or she has reserved the Contractory Al-Built Set out has begun the contract of the Record Set
۵.	The Ar-ball lief of documents has been streaded by the Carthologic of Choice OC The Ar-ball lief of documents has been streaded by the Carthologic of the the Ar-ball control of the Carthologic of the final Recent Sar of mounters, include a term recent limit the Ari Recent Sar of		All follow indicating that he as she has restrict the Contractory Ai-Built for and hes begun the creation of the Record Set
7	Draft Operations and Maintenance (D&Ar) Manuals have been provided to UCF. The UCF PH will confirm receipt of O&M Manuals not that they have been sumed over to Pacifice December 34 meries.		
) A.	Draft warranties have been provided to the Danier for mains and acceptance of lenses, include a latter from the Constructor Earling of dragt warranties provided to LOF for reveaus. The LOF RM will confirm receipt of draft warranties.	ta -	Contractor letter listing all datt warranties previded to UCF for review The UCF RM will confirm receipt of draft warranties
0	All lock cores have been changed from the construction marker to University cores, include a letter or email from the UCF cocksrich, conforming that the change-out of lock cores is complete.	5a	Letter or small from the UCE Locismith, confirming that the change out of loce core is complete
10	The final building cleaning has been completed by the Contractor. The UCP AM will confirm that the final building cleaning has been completed to the UCP IMTs and UCP and varis schidaction.	1	

- 3. Select an action and click **Take Action** button to move process along; possible actions are:
 - **a.** Approve to PM Select this action if all information is correct and process is ready to move forward.

Schedule

Reports

b. Revise to Initiator/PM – 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

09 - Substantial Cor	npletion (SC) - 1	Delete Ins	tance	Workflow Override	All Fields View	N I	Instructions
	Please select an action T a	ke Action	Check Spell	ing Print Copy	Delegate	Save	Cancel







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Dashboard

Calendar

Contacts

Bidding

F&S Directors:

1. Click process name to open Substantial Completion.

Projects

rocesses	Reports (0)	
Proce	ss Subject	

Forms

Processes

Documents

2. Review the information, Required fields will have a red asterisk (*) and the process cannot be submitted until all required fields have been completed.

 If using the Redline tool on the attachments, Once the new window appears with the file of When complete, click the Annotate drop dow Give the annotation layer a name and click O Close the window. 	click the Redine link beneath the file name. ontent on the screen, dick the Annotate button to start marking up the file. m menu and select Save K.	
Reviewing Redline Markups (marked up documents i	will be denoted with a number next to the word "Redline" - For example, Redline.(]) to denote there is only 1 layer of markups.	
 Click on "Redline (X)" Click on the Annotate drop down menu and Click on the checkbox next to the markup file 	select OPEN you wish to view from the list	
f you wish to mark up the existing file, you can do s		
If you wish to save the markup onto the exist If you wish to save the markup onto another	ing file, click SAVE. Iayer, click SAVE AS, name the new layer, then click DK.	
Subconsultant Billing:		
Reimbursables:		
Contractor - Is This a Final Completion?: PM - Is This a Final Completion?:		
Contractor - Is This a Final Completion?: PM - Is This a Final Completion?: Commitment Invoice Details		
Contractor - Is This a Final Completion?: PM - Is This a Final Completion?: Commitment Involce Details Status:	Dalt	
Contractor - Is This a Final Completion?: PM - Is This a Final Completion?: Commitment Invoice Details Status:	Draft Select a commitment	
Contractor - Is This a Final Completion?: PM - Is This a Final Completion?: Commitment Invoice Details Status: Commitment: invoice Number:	Draft Select a commitment. Company/Contact	
Contractor - Is This a Final Completion?: PM - Is This a Final Completion?: Commitment Invoice Details Status: Commitment: Invoice Number: Date Received:	Draft Select a commitment	

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

Cost

Schedule

- **a. Approved** Select this action if all information is entered and process is ready to move forward.
- b. Revise to PM 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

09 - Substantial Completion (SC) - 1	Delete Inst	tance	Workflow Ov	verride	All Fields View		Instructions	
Please select an action 🔻 🛛 Ta	ke Action	Check Spelli	ng Print	Сору	Delegate	Save	Cancel	



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
 - <u>Current Actors</u>: 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)



Support Information

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ħ	Dashboard	Projects	Forms	Processes	Documents	Calendar	Contacts	Bidding	Cost	Schedule	Reports	+
<u>Sup</u>	port:					Note	s and Commen	<u>its:</u>				
	Announceme To contact e-Be Please call (888) support@e-buil	ents - uilder Support 288-5717 or ema der.net. Thank yo	511 L1									