

## Project Charter Process Narrative



### Purpose

The purpose of the Project Charter process is to understand, summarize, and present key project information in a concise manner, which will be reviewed and prioritized by FP&C Leadership, or returned for revision. During development of the Project Charter, the PM will review project information, including any Notes or Documents supplied with the project, and verify/identify the correct Requesting Entity and establish a positive relationship with the client. The PM will also develop a basic Project Scope, determine if a design professional is required, if any permitting will be required, create an initial Project Budget and Project Schedule, recommend a Delivery Method for the work, and confirm the funding source(s) for the project.

### Initiator

The Project Charter process is initiated by the Project Manager (PM). The PM can start developing the Project Charter after they have acknowledged the project request in eBuilder.

### Key Terms

Project Charter	A set of information containing estimates for Project Cost and Project Schedule, as well as Delivery Method, developed by the PM after meeting with project requestor, walking the site, and reaching an agreement on the Project Scope.
Project Charter Process	The eBuilder process the PM initiates after inputting estimated information into the Cost and Schedule modules and selecting a Delivery Method. The process requires the Manager, Facilities Planning (MGR) and/or Director to review and approve.
Project Requestor	Individual who submits a Minor Project Request Form.
Campus Client (CC)	Ongoing Point of Contact for the Minor Project for the Requesting Entity.
Requesting Entity	Entity requesting the Minor Project such as a College, Department, Office, or Auxiliary.
Delivery Method	Method describing how the Contractor for the project will be selected. Delivery Methods consist of Competitive Bid (eB Quotes), Direct Selection, and Rotation.

### **Key Steps**

Start: Project Review - PM Reviews Project Details and attached documentation in eBuilder

Step1: Initial Interaction - PM initiates communication with Project Requestor

Step2: In-Person Meeting/Site Visit

Step2A (Optional): AE Site Visit and Budget Input

Step3: Develop Budget Estimate

Step3A: FP&C Assistant Director Approves Budget

Step4: Develop Project Schedule

Step5: Determine Delivery Method

Step6: Confirm Funding Source(s)

Step7: Create Project Charter

Finish: Management Approves or Rejects Charter

### **Project Review**

The starting point of the Project Charter is the review of a newly assigned and acknowledged project. Before reaching out to the listed CC, the PM reviews information listed in the Project Details section of the eBuilder project, as well as reviewing any documents that were attached. If the PM has any questions about the information, they can reach out to the Construction Project Coordinator for clarification.

### **Initial Interaction**

After the Project Review has been performed, the PM should be equipped with quality information. The PM calls the CC to:

- Introduce themselves and advise that they are the PM assigned to the (Project Name)
- Provide their contact information and the Project Number to the CC
- Verify if the CC is the correct Point of Contact for the project, and if there are any other individuals the CC would like include in project communications
- Discuss the project and determine if the CC has any expectations around the project cost or completion time frame
- Determine if the CC is available for an in-person meeting/site visit (in almost all cases this is advisable)
- Add notes from this interaction in eBuilder to memorialize the discussion
- Add any additional personnel requested during the call to the Project Participants list
- Schedule the in-person meeting/site visit with the appropriate individual(s) as discussed

### **In-Person Meeting/Site Visit**

In most cases the PM should arrange a site visit with the CC where they can:

- Meet with the CC to present the project scope based on the original Project Details and initial conversation
- Gather additional information including an observation of existing site conditions
- Re-confirm the project scope, and advise the POC on next steps
- Notes from this meeting should be entered into eBuilder as soon as practicable

**Develop Budget Estimate***(see Project Charter Budget Narrative)*

- **Design Professional will be Required – YES/NO**
  - **YES**
    - AE selected to participate in project
    - PM meets with AE to walk site and get rough estimates of job costs
  - **NO**
    - PM uses prior experience to determine cost estimates
- **e-Builder Cost Module – Create Budget Estimate**
  - PM should use Budget Template, then delete non-applicable line items
  - PM enters estimated values into applicable budget line items based on information gathered and/or prior experience
  - Once all budget values have been input, PM selects Submit Budget to move the project budget into the Assistant Directors court for approval
  - eBuilder saves information continuously in the Cost module so there is no need to save work as you go

**Develop a Project Schedule***(see Project Charter Schedule Narrative)*

- **e-Builder Schedule Module – Create Schedule**
  - A schedule template will be applied by the Project Assistant before assigning the project to the Project Manager
  - Depending on project scope, remove any non-applicable schedule tasks
  - Review Predecessors to ensure all are properly synced – templates include predecessor relationships already. If the PM adds any new tasks, they must set these relationships manually.
  - Review Construction Time to ensure that it matches client and realistic expectations
  - Save a snapshot of the completed schedule

### **Determine Delivery Method**

- Based on client need / project timeline, and [award policy](#), PM should select the appropriate Delivery Method for Continuing Service Contractors
  - In-house completion (Typically an FO Work Order)
  - Completion by a single trade
  - Completion by more than one trade with UCF oversight
  - Completion by Job Order Contractor (JOC)
  - Completion by a licensed General Contractor (GC)
  - Completion by a licensed Construction Manager (CM)
  - Completion by a Design Builder
- Projects less than \$35K
  - PM will create a Statement of Work (SOW)
  - Rotation
  - Job Order Contract
- Projects over \$35K awarded to General Contractors
  - PM will create a Statement of Work (SOW)
  - Job Order Contract
  - E-B Quotes
  - Direct Selection with Justification
- Projects over 35K awarded to Construction Managers
  - PM will create a Statement of Work (SOW)
  - Justification

### **Confirm Funding Source(s)**

- Discuss with the client how the project will be funded, noting that the budget estimate may change depending on various factors, and identify the accounts from which funding will be pulled
  - E&G - Education & General
  - C&G - Contracts & Grants
  - AUX - Auxiliary Funds
  - OTHER

## Create the Project Charter

The following how to guide has been developed for the PM to reference as they initiate the 02 – Project Charter process in e-Builder.

## How to guide – The Project Charter

The e-Builder Project Charter is comprised of the following sections:

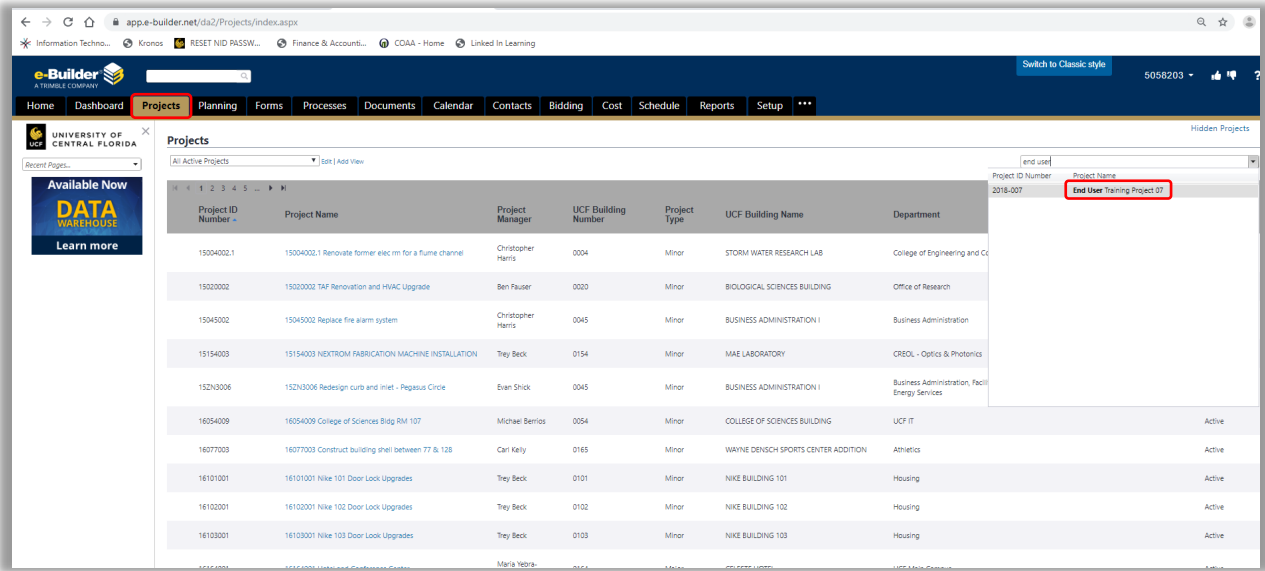
Header	Project Name, Number, and Subject
PROJECT INFORMATION	General information about the project
DESIGN	Used only if the project requires design professionals Select recommended design professionals as applicable
PROJECT COST REPORT	Requires approved project cost/budget
PROJECT COST	PM uploads project cost report here
PROJECT TIME REPORT	Requires completed project schedule to execute
PROJECT SCHEDULE	PM uploads project schedule here
PERMITTING	Captures anticipated permitting requirements
BIDDING/AWARD/CONSTRUCTION	Select Delivery Method and provide recommendation logic Select recommended vendors for each activity as applicable
APPROVAL	Records approval actions of PM, MGR, and Director

Before initiating the Project Charter process, the PM should complete the below pre-requisites:

1. Review comments in the Project Details Notes tab for information added during the Project Request Process
2. Review all documents contained in the Project Details Documents tab for any documents added during the Project Request Process
3. Meet with the requester and any relevant partner departments to develop a basic scope
4. In the e-Builder Cost Module, create the Project Budget
5. In the e-Builder Schedule Module, create a Project Schedule

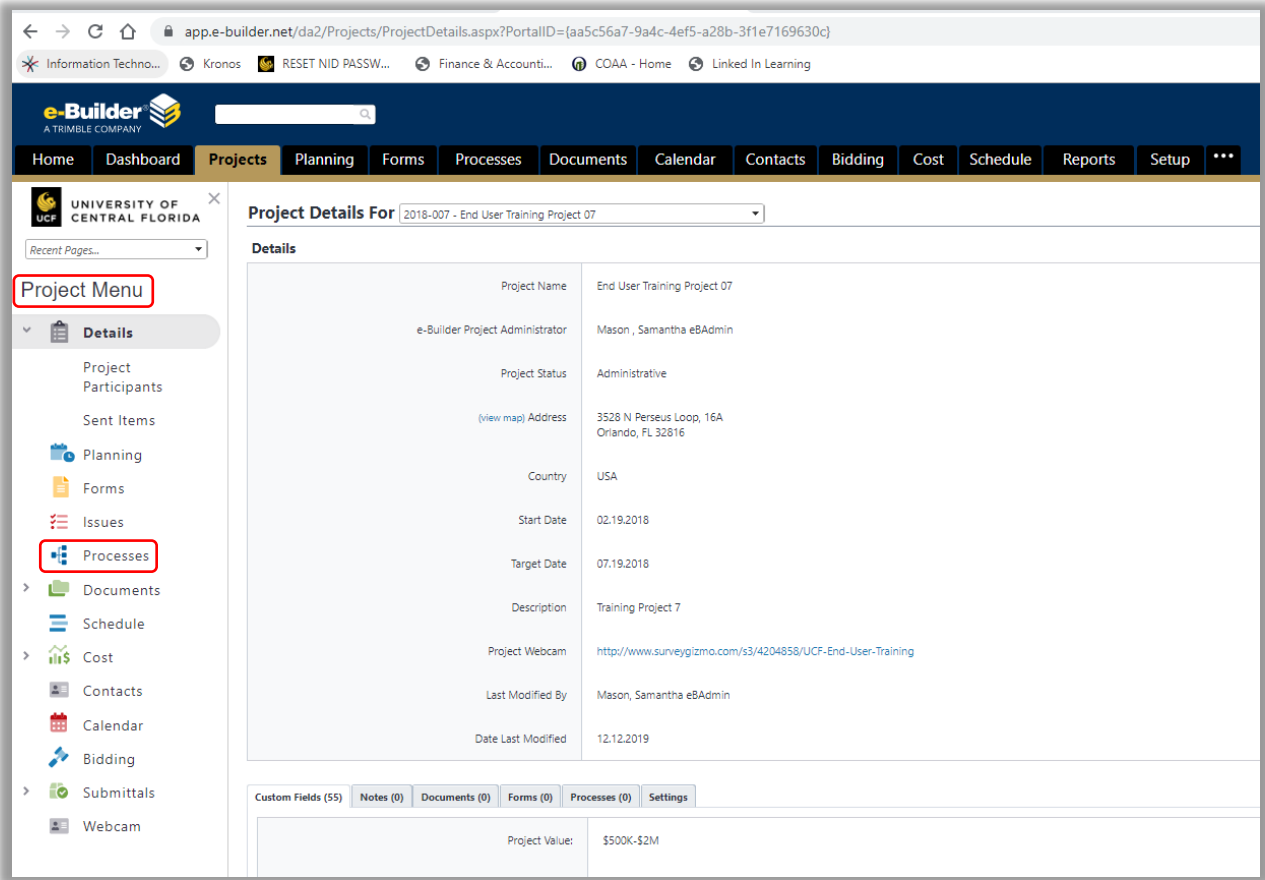
Once all pre-requisites are completed, access e-Builder and select the Projects menu tab.

From the e-Builder Projects screen



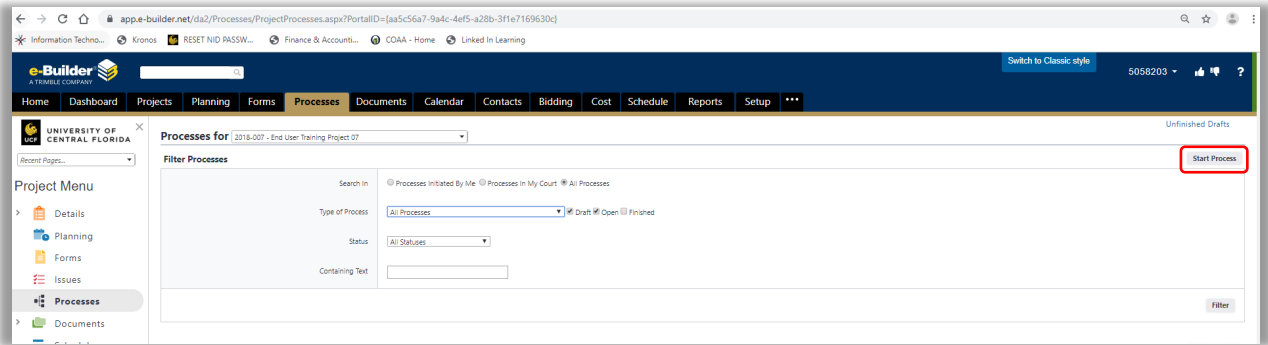
- Search for and select the project for which you wish to initiate the O2-Project Charter Process

From the Project Menu



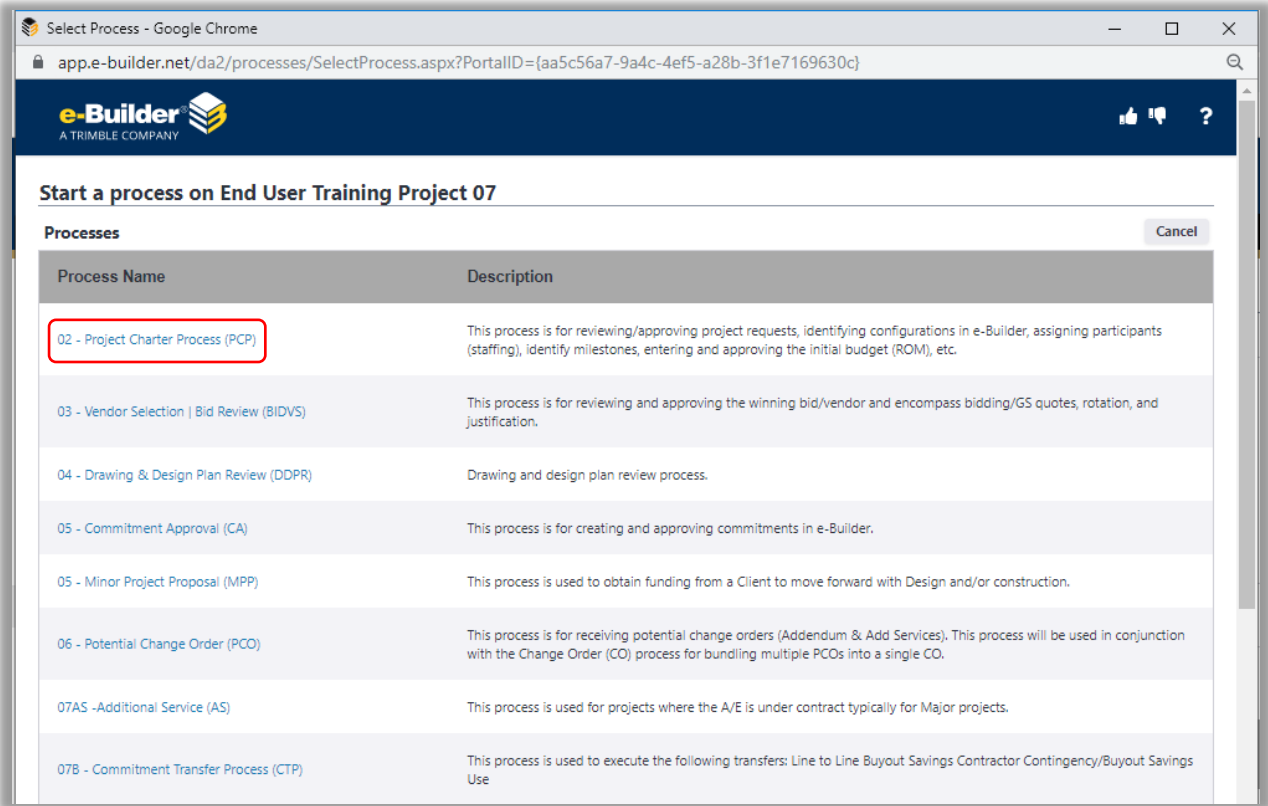
- Select the Processes link

From the Processes screen



- Select the Start Process button

From the Start a Process pop-up window



- Select the 02 – Project Charter Process (PCP) link

From the 02 – Project Charter Process (PCP) screen – PROJECT INFORMATION section



**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

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

- Input ESTIMATED PROJECT TIME as a whole integer indicating the months from planning to close-out
- Input ESTIMATED PROJECT COST in whole dollars
- Select TYPE OF PROJECT dropdown menu

-- Please select an option --

-- Please select an option --

NEW BUILDING

ADDITION

RENOVATION

EXTERIOR ONLY

OTHER

- Select the option that best describes your project

- Select the CHANGE OF SPACE TYPES dropdown menu

-- Please select an option --

-- Please select an option --

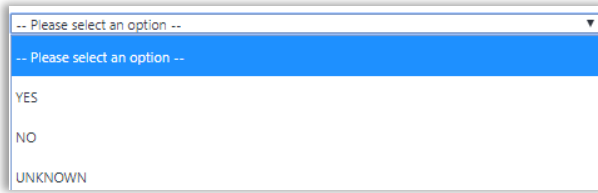
YES

NO

UNKNOWN

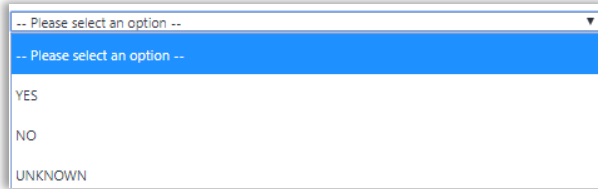
- Select the applicable option

- Select the CHANGE OF ROOM NUMBERS dropdown menu



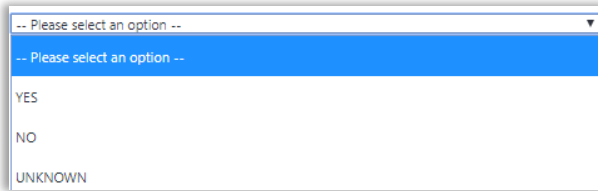
- Select the applicable option

- Select the CHANGE OF OCCUPANCY COUNT dropdown menu



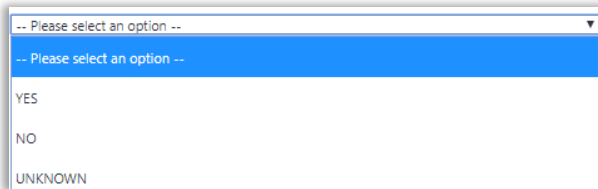
- Select the applicable option

- Select the INCREASE OF MECHANICAL CAPACITY dropdown menu



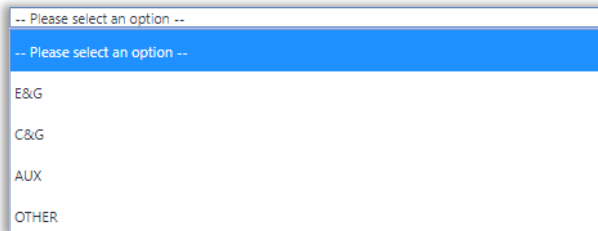
- Select the applicable option

- Select the PROJECT FULLY FUNDED dropdown menu



- Select the applicable option

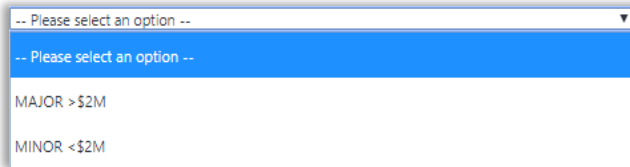
- Select the FUNDING SOURCE dropdown menu



- Select the applicable option
  - E&G – Education & General

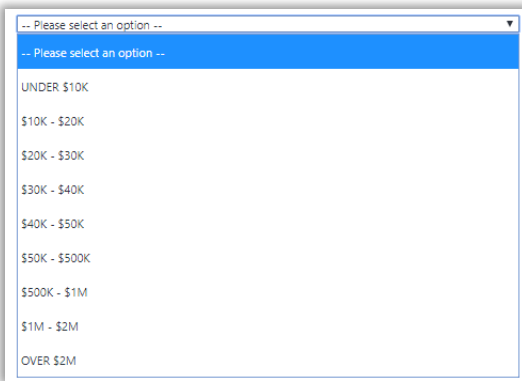
- C&G – Contracts & Grants
- AUX – Funds from Auxiliary organizations
- OTHER – Technology Fee, Donations, etc

- Select the MAJOR OR MINOR PROJECT dropdown menu



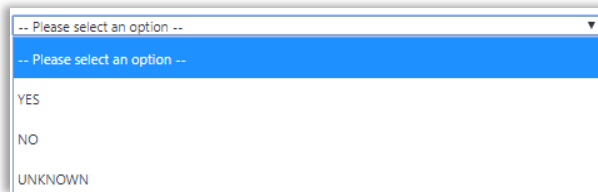
- Select the applicable option

- Select the ESTIMATED PROJECT COST RANGE dropdown menu



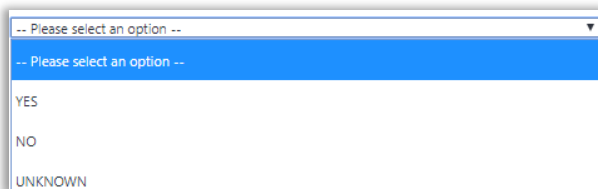
- Select the range which corresponds to your ESTIMATED PROJECT COST

- Select the RESEARCH EQUIPMENT INSIDE ROOM dropdown menu



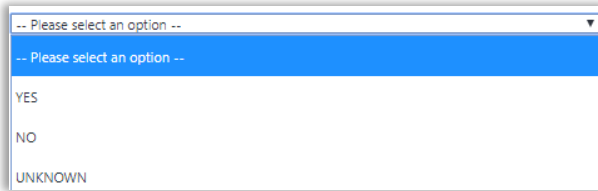
- Select the applicable option

- Select the HAZARDOUS MATERIALS dropdown menu



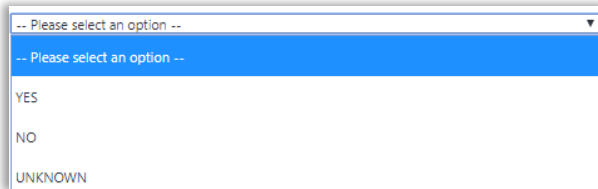
- Select the applicable option

- Select the FURNITURE dropdown menu



- Select the applicable option

- Select the SPACE SHARED? IF YES, DESCRIBE ABOVE dropdown menu



- Select the applicable option
- Notes on shared space are entered in the PROJECT DESCRIPTION

- Select the calendar icon next to the PROJECT DEADLINE field

- Select the date you expect the project to close out according to the Project Schedule

## From the 02 – Project Charter Process (PCP) screen – DESIGN section

**DESIGN**

[Lookup] instructions:

1. Click [Lookup]
2. Type the firm's characters of the company name in the Company box
3. Click the FILTER button
4. Click on the company name of the company identified

DESIGN TEAM REQUIRED: -- Please select an option --

ARCHITECT: [Lookup]

MEP ENGINEER: [Lookup]

CIVIL ENGINEER: [Lookup]

LANDSCAPE ARCHITECT: [Lookup]

BUILDING ENVELOPE: [Lookup]

THRESHOLD INSPECTION: [Lookup]

FIRE ALARM: [Lookup]

ELECTRICAL PANEL EVALUATION: -- Please select an option --

FIRE PENETRATIONS INSPECTIONS REQUIRED: -- Please select an option --

JUSTIFICATION EXPLANATION:

Font Name: Real... | Bold | Italic | Underline | Text Color | Background Color | Bulleted List | Numbered List | Indent | Outdent | Undo | Redo | Refresh | Print | Close

UNPC REQUIRED: -- Please select an option --

LEED REQUIRED: -- Please select an option --

SCHEMATIC DESIGN REQUIRED: -- Please select an option --

DESIGN DEVELOPMENT REQUIRED: -- Please select an option --

50% CONSTRUCTION DOCUMENTS REQUIRED: -- Please select an option --

100% CONSTRUCTION DOCUMENTS REQUIRED: -- Please select an option --

WORKSHOPS REQUIRED: -- Please select an option --

CRITICAL NEEDS CHECKLIST REQUIRED: -- Please select an option --

HVAC EVALUATION: -- Please select an option --

COMMISSIONING AGENT REQUIRED: -- Please select an option --

- Select the DESIGN TEAM REQUIRED dropdown menu

-- Please select an option --

-- Please select an option --

YES

NO

UNKNOWN

- Select the applicable option
  - If YES is selected, complete the applicable information in the section. If NO, or UNKNOWN is selected, continue to the PROJECT COST REPORT section.
- Select the [Lookup] link next to any design professional category for which you wish to recommend a vendor

From the Lookup Company pop-up window

**e-Builder**  
A TRIMBLE COMPANY

### Lookup Company

**Filter Companies** Clear

Company:

City:

Area Code:

Zip Proximity: Within  miles of

Construction Codes:  Lookup ⓘ

Company Custom Fields:

State:  Lookup

County:  Lookup

Project Companies Only:

Filter

**Companies** (Click on company name to view the details) Cancel

Company Name	City	State	Phone
BRPH Architects-Engineers Inc	Melbourne	FL	

- Search for a specific design professional you wish to recommend
  - Input the name or a partial name into the Company field
  - Select the Filter button

From the Lookup Company pop-up window

**e-Builder**  
A TRIMBLE COMPANY

### Lookup Company

**Filter Companies** Clear

Company:

City:

Area Code:

Zip Proximity: Within  miles of

Construction Codes:  Lookup

Company Custom Fields:  Lookup

State:  Lookup

County:  Lookup

Project Companies Only:

**Companies** (Click on company name to view the details) Cancel

Company Name	City	State	Phone
There are no companies for this selection			

Cancel

- Search for a category of vendors to select from
  - Select the Company Custom Fields dropdown menu
  - Select Continuing Service Category

From the Lookup Company pop-up window

**e-Builder**  
A TRIMBLE COMPANY

**Lookup Company**

**Filter Companies** Clear

Company:

City:

Area Code:

Zip Proximity: Within  miles of

Construction Codes:  Lookup i

Company Custom Fields: Continuing Service Category  Lookup

State:  Lookup

County:  Lookup

Project Companies Only:

Filter

**Companies** (Click on company name to view the details) Cancel

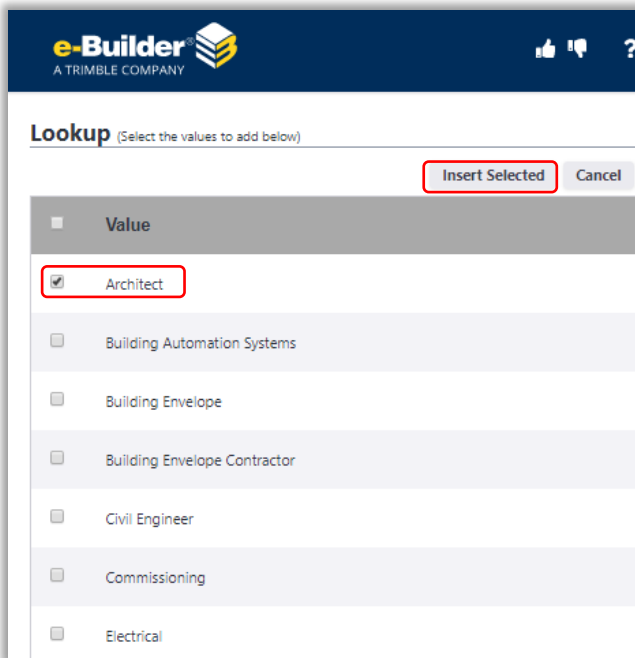
Company Name	City	State	Phone
There are no companies for this selection			

Cancel

- Select the Lookup button underneath the field displaying Continuing Service Category



From the Lookup pop-up window



- Select the checkbox next to the Value you wish to filter by
- Select the Insert Selected button

**e-Builder**  
A TRIMBLE COMPANY

**Lookup Company**

**Filter Companies** Clear

Company:

City:

Area Code:

Zip Proximity: Within  miles of

Construction Codes:  Lookup i

Company Custom Fields:

Continuing Service Category:  Lookup

State:  Lookup

County:  Lookup

Project Companies Only:

Filter

**Companies** (Click on company name to view the details) Cancel

Company Name	City	State	Phone
AECOM Technical Services Inc	Los Angeles	CA	
<b>BRPH Architects-Engineers Inc</b>	Melbourne	FL	
C.T. Hsu + Associates, P.A.	Orlando	FL	(407) 423-0096

- Select the Filter button
- Select your recommended vendor from the results

From the 02 – Project Charter Process (PCP) screen – DESIGN section

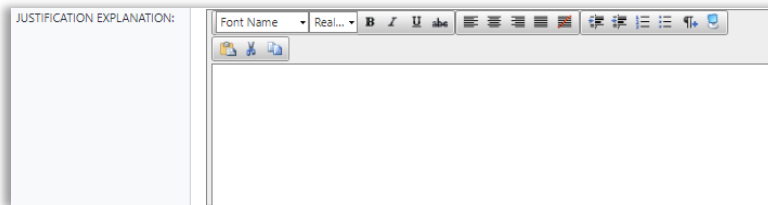
- You will see your selected design professional displayed
- Repeat this process for any other design professionals you wish to recommend
- Select the ELECTRICAL PANEL EVALUATION dropdown menu

- Select the applicable option

- Select the FIRE PENETRATIONS INSPECTIONS REQUIRED dropdown menu

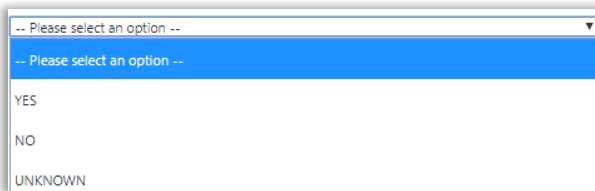
- Select the applicable option

- Input why you are recommending the design professional(s) in the JUSTIFICATION EXPLANATION text field



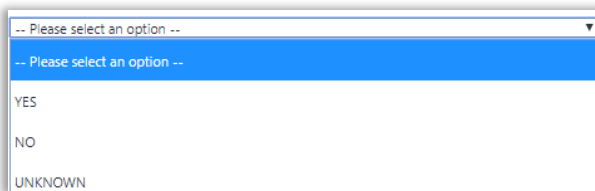
- *It can be helpful to create and save statements for a number of common reasons in a separate file, from which you can then copy and paste a prepared statement into this field, modifying the statement verbiage if needed*

- Select the UMPC REQUIRED dropdown menu



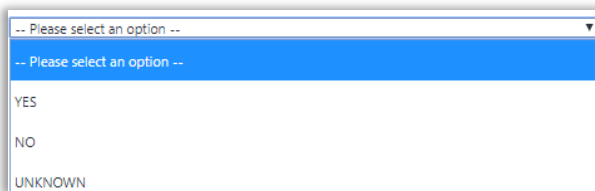
- Select the applicable option

- Select the SCHEMATIC DESIGN REQUIRED dropdown menu



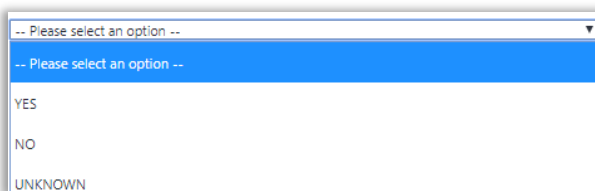
- Select the applicable option

- Select the DESIGN DEVELOPMENT REQUIRED dropdown menu



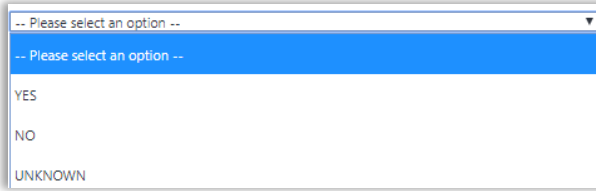
- Select the applicable option

- Select the 50% CONSTRUCTION DOCUMENTS REQUIRED dropdown menu



- Select the applicable option

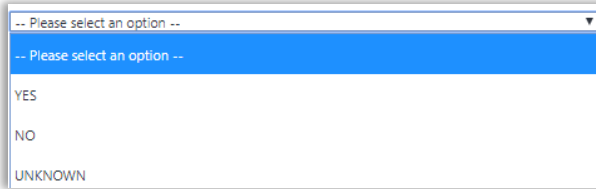
- Select the 100% CONSTRUCTION DOCUMENTS REQUIRED dropdown menu



A screenshot of a web form dropdown menu. The menu is open, showing three options: "YES", "NO", and "UNKNOWN". The top of the menu is highlighted in blue and contains the text "-- Please select an option --".

- Select the applicable option

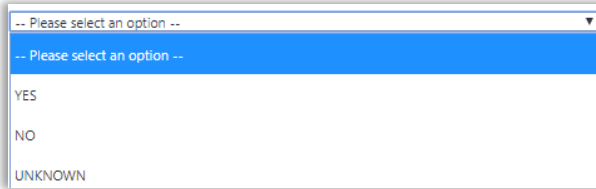
- Select the WORKSHOPS REQUIRED dropdown menu



A screenshot of a web form dropdown menu. The menu is open, showing three options: "YES", "NO", and "UNKNOWN". The top of the menu is highlighted in blue and contains the text "-- Please select an option --".

- Select the applicable option

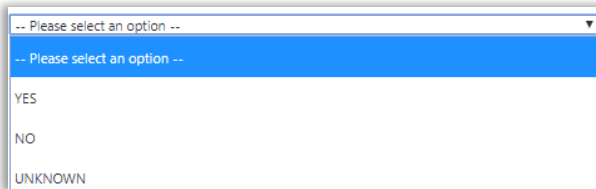
- Select the CRITICAL NEEDS CHECKLIST REQUIRED dropdown menu



A screenshot of a web form dropdown menu. The menu is open, showing three options: "YES", "NO", and "UNKNOWN". The top of the menu is highlighted in blue and contains the text "-- Please select an option --".

- Select the applicable option

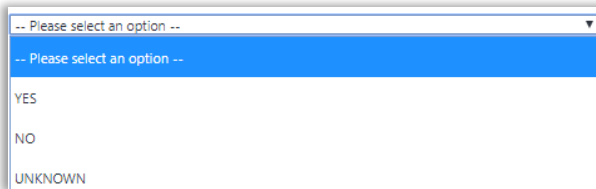
- Select the HVAC EVALUATION dropdown menu



A screenshot of a web form dropdown menu. The menu is open, showing three options: "YES", "NO", and "UNKNOWN". The top of the menu is highlighted in blue and contains the text "-- Please select an option --".

- Select the applicable option

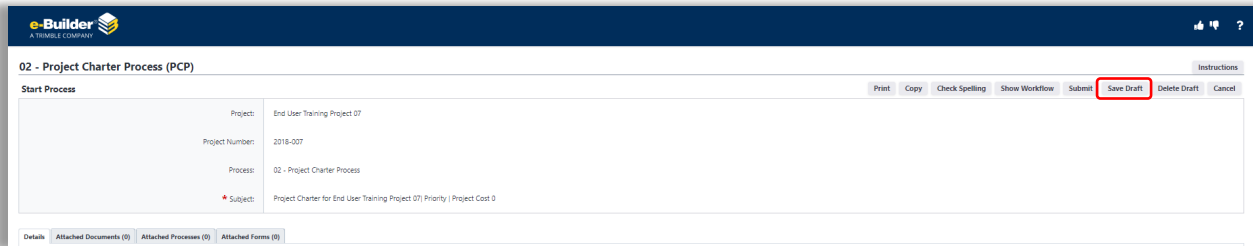
- Select the COMMISSIONING REQUIRED dropdown menu



A screenshot of a web form dropdown menu. The menu is open, showing three options: "YES", "NO", and "UNKNOWN". The top of the menu is highlighted in blue and contains the text "-- Please select an option --".

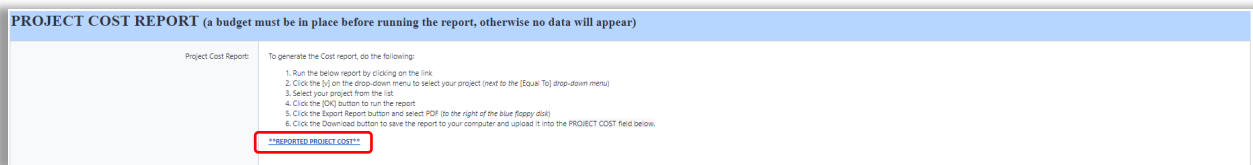
- Select the applicable option

## From the 02 – Project Charter process (PCP) screen



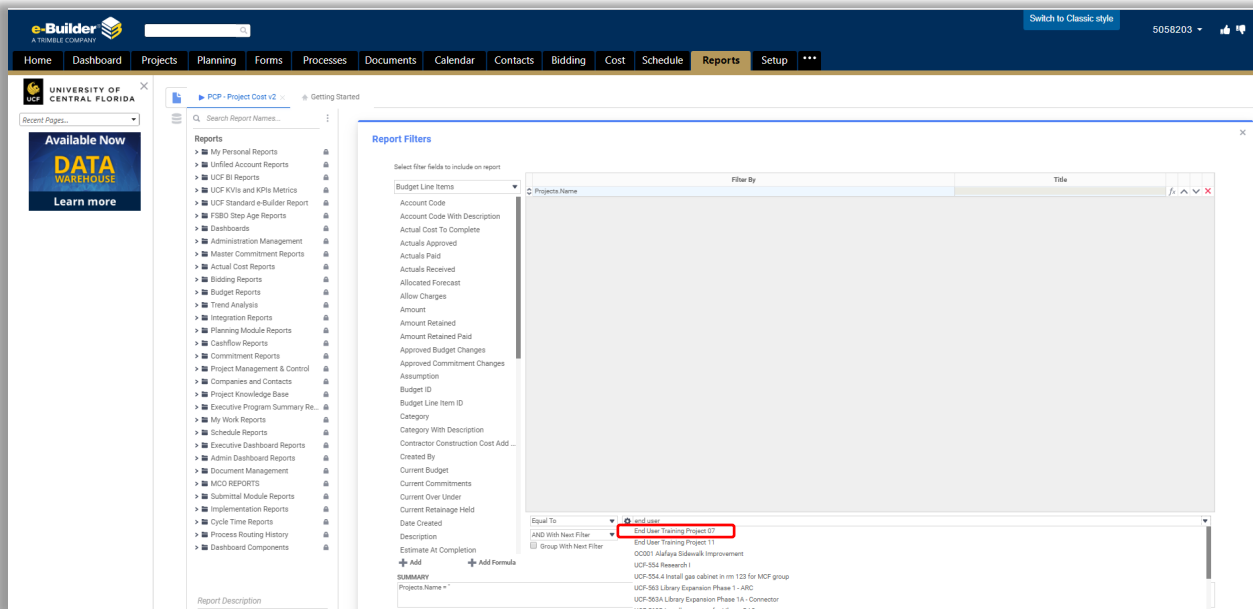
- Select the Save Draft button
  - *It is critical to save your work here as the next step of the process will cause you to navigate away from this page --- all unsaved work will be lost.*

## From the 02 – Project Charter Process (PCP) screen – PROJECT COST REPORT section



- Ensure the Project Budget you created in the Cost Module is approved
- Select the **\*\*REPORTED PROJECT COST\*\*** link, which will take you the Reports Menu

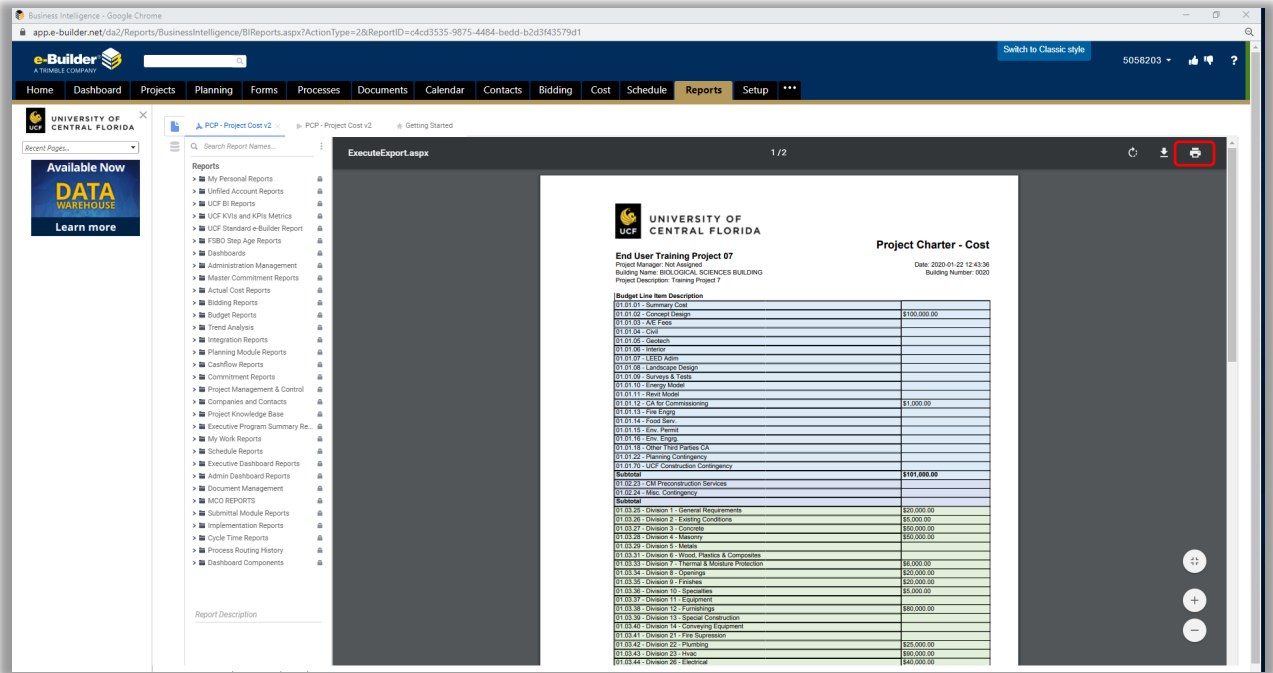
## From the Reports menu



- Input key words of the Project Name into the unlabeled dropdown menu to the right of the field displaying Equal To
- Select the dropdown menu now containing these key words
- Select the project, for which you are creating the Project Charter



# From the Reports Menu



- Select the print icon



From the Print pop-up window

The screenshot shows a software interface with a print pop-up window. The background displays a 'Project Charter - Cost' report for the University of Central Florida. The report lists various construction items and their costs. The print pop-up window is open, showing options for destination (FPC - Project Manager), pages, copies, color, and more settings. A dropdown menu is open from the destination field, highlighting the 'Save as PDF' option.

Item	Cost
01.03.23 - CM Preconstruction Services	\$101,000.00
01.02.24 - Misc. Contingency	
<b>Subtotal</b>	<b>\$101,000.00</b>
01.03.25 - Division 1 - General Requirements	\$20,000.00
01.03.26 - Division 2 - Existing Conditions	\$5,000.00
01.03.27 - Division 3 - Concrete	\$50,000.00
01.03.28 - Division 4 - Masonry	\$50,000.00
01.03.29 - Division 5 - Metals	
01.03.31 - Division 6 - Wood, Plastics & Composites	
01.03.33 - Division 7 - Thermal & Moisture Protection	\$6,000.00
01.03.34 - Division 8 - Openings	\$20,000.00
01.03.35 - Division 9 - Finishes	\$20,000.00
01.03.36 - Division 10 - Specialties	\$5,000.00
01.03.37 - Division 11 - Equipment	
01.03.38 - Division 12 - Furnishings	\$80,000.00
01.03.39 - Division 13 - Special Construction	
01.03.40 - Division 14 - Conveying Equipment	
01.03.41 - Division 21 - Fire Suppression	
01.03.42 - Division 22 - Plumbing	\$25,000.00
01.03.43 - Division 23 - Hvac	\$90,000.00
01.03.44 - Division 26 - Electrical	\$40,000.00

- Select the Destination dropdown menu, then select the Save as PDF option

From the Print pop-up window

**UNIVERSITY OF CENTRAL FLORIDA**

**Project Charter - Cost**

**End User Training Project 07**  
 Project Manager: Not Assigned  
 Building Name: BIOLOGICAL SCIENCES BUILDING  
 Project Description: Training Project 7  
 Date: 2020-01-22 12:43:36  
 Building Number: 0020

Budget Line Item	Description	
01 01 01	Summary Cost	
01 01 02	Concept Design	\$100,000.00
01 01 03	A/E Fees	
01 01 04	Cost	
01 01 05	Geotech	
01 01 06	Interior	
01 01 07	LEED Admin	
01 01 08	Landscape Design	
01 01 09	Surveys & Tests	
01 01 10	Energy Model	
01 01 11	Revol Model	
01 01 12	CA for Commissioning	\$1,000.00
01 01 13	Fire Engrg	
01 01 14	Food Serv.	
01 01 15	Env. Permit	
01 01 16	Env. Engrg	
01 01 18	Other Third Parties CA	
01 01 22	Planning Contingency	
01 01 30	UCF Construction Contingency	
<b>Subtotal</b>		<b>\$101,000.00</b>
01 02 23	CM Preconstruction Services	
01 02 24	Misc. Contingency	
<b>Subtotal</b>		
01 03 25	Division 1 - General Requirements	\$20,000.00
01 03 26	Division 2 - Existing Conditions	\$5,000.00
01 03 27	Division 3 - Concrete	\$50,000.00
01 03 28	Division 4 - Masonry	\$50,000.00
01 03 29	Division 5 - Metals	
01 03 31	Division 6 - Wood, Plastics & Composites	
01 03 33	Division 7 - Thermal & Moisture Protection	\$4,000.00
01 03 34	Division 8 - Openings	\$20,000.00
01 03 35	Division 9 - Finishes	\$20,000.00
01 03 38	Division 10 - Specialties	\$5,000.00
01 03 37	Division 11 - Equipment	
01 03 38	Division 12 - Furnishings	\$80,000.00
01 03 39	Division 13 - Special Construction	
01 03 40	Division 14 - Conveying Equipment	
01 03 41	Division 21 - Fire Suppression	
01 03 42	Division 22 - Plumbing	\$25,000.00
01 03 43	Division 23 - Hvac	\$90,000.00
01 03 44	Division 26 - Electrical	\$40,000.00
01 03 45	Division 27 - Communications	
01 03 46	Division 28 - Electronic Safety & Security	
01 03 47	Division 31 - Earthwork	\$10,000.00
01 03 48	Division 32 - Exterior Improvement	\$10,000.00
01 03 49	Division 33 - Utilities	\$6,000.00
01 03 50	Allowances & Alternates	
01 03 51	General Liability	
01 03 52	General Conditions	
01 03 53	Contractor's Fee	\$90,000.00
01 03 54	Payment & Performance Bond	
01 03 55	Construction Contingency	\$30,000.00

Print 2 pages  
 Destination Save as PDF  
 Pages All  
 Pages per sheet 1  
 Save Cancel

- Select the Save button
- Select the file directory on your computer, in which you wish to save this document
- Change the File name of the document to, Project Name + “Project Budget” + MMDDYYYY
- Save the document

In e-Builder, navigate back to the Process menu

**e-Builder** A TRIMBLE COMPANY

Home Dashboard Projects Planning Forms **Processes** Documents Calendar Contacts Bidding Cost Schedule Reports Setup

UNIVERSITY OF CENTRAL FLORIDA

Processes for 2018-2017 - End User Training Project 07

Filter Processes

Search in: Processes Initiated By Me | Processes in My Court | All Processes

Type of Process: PCP - Project Charter Process (PCP) | Draft | Open | Finished

Status: All Statuses

Step Name

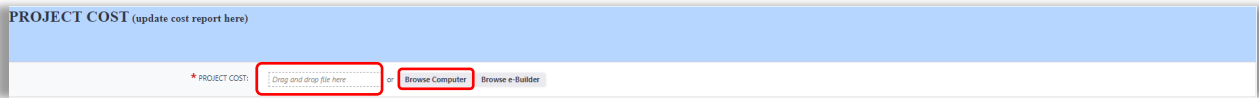
Containing Text

Filter

Process	Subject	Step	Responsible Actors	Step Age	In Step Since	Date Created	Process Age	Status	Requested Comment
PCP - 1	Project Charter for End User Training Project 07, Priority 1 - Emergency   Project Cost 888,600.00	AD Review	Ben Fausser	1	01.22.2020	01.21.2020	1	Submitted	
PCP	Project Charter for End User Training Project 07, Priority   Project Cost 0					01.22.2020		NotAssigned	

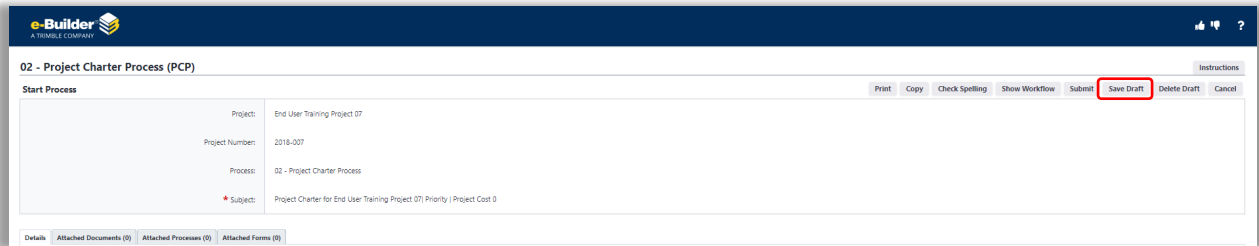
- Select the in-progress Project Charter process you are working with

## From the 02 – Project Charter Process (PCP) screen – PROJECT COST section



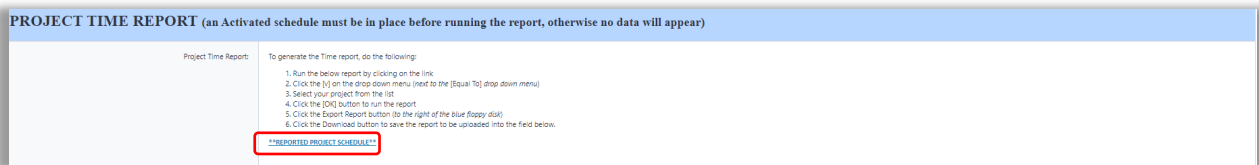
- Drag and drop the file you just created into the PROJECT COST field
- Or, select the Browse Computer button and select the file from the directory on your computer in which you saved the estimated project budget

## From the 02 – Project Charter process (PCP) screen



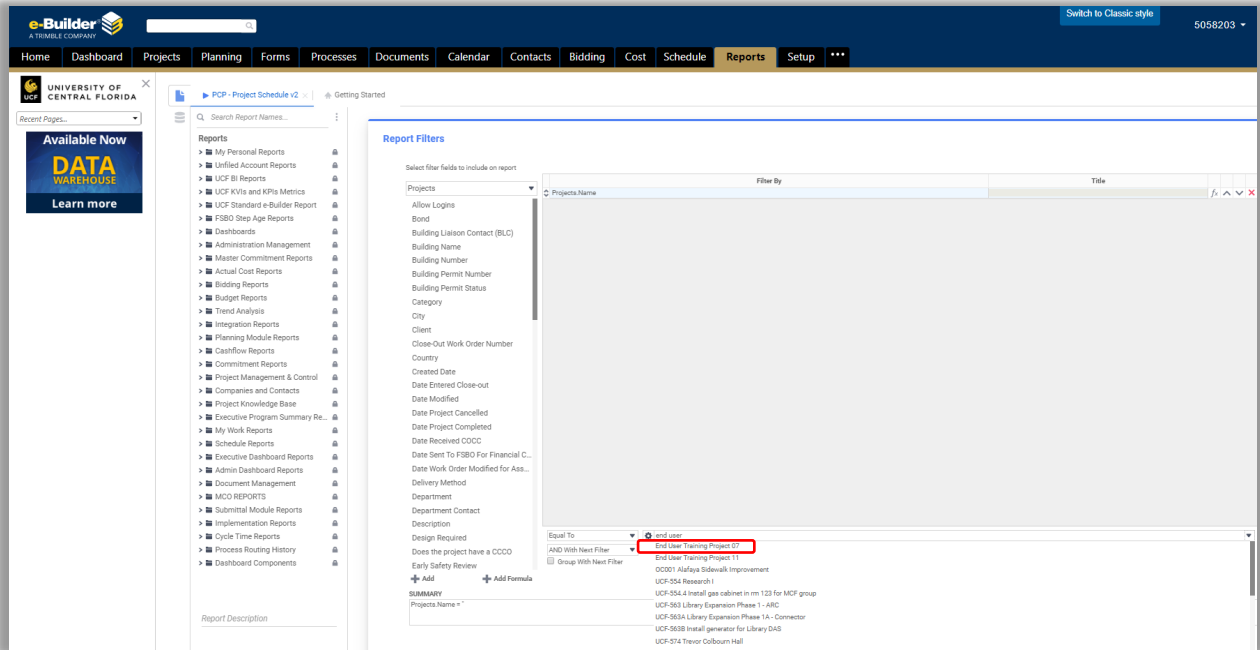
- Select the Save Draft button
  - *It is critical to save your work here as the next step of the process will cause you to navigate away from this page --- all unsaved work will be lost.*

## From the 02 – Project Charter Process (PCP) screen – PROJECT TIME REPORT section



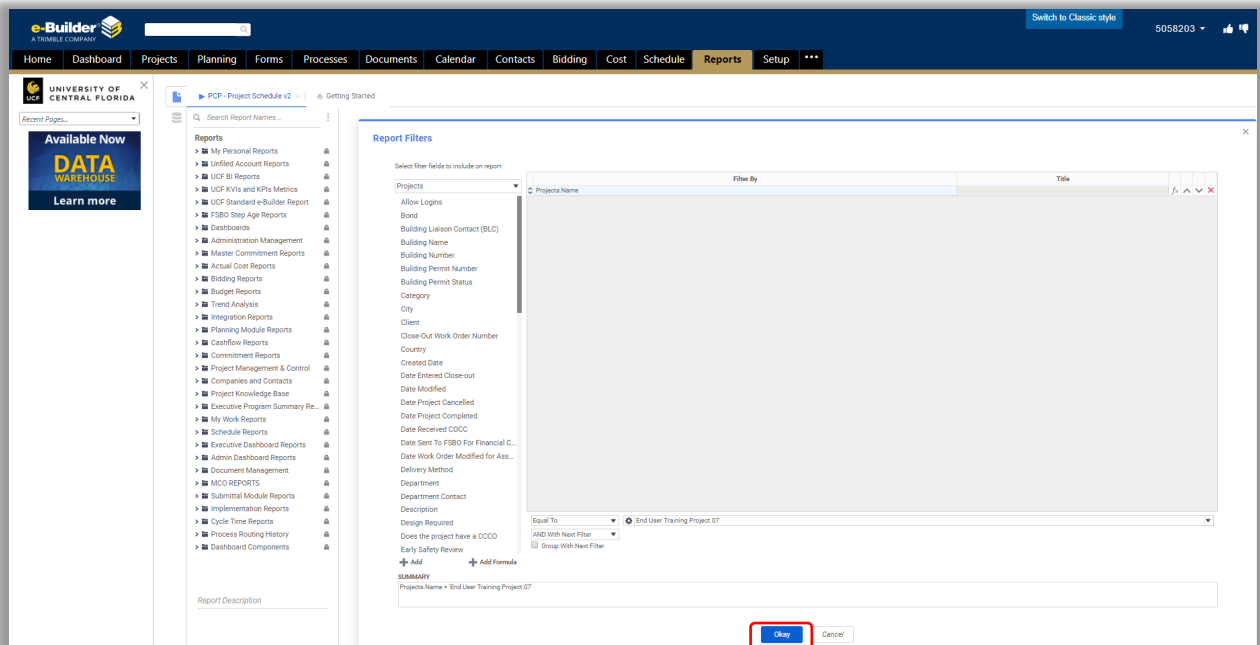
- Ensure you have completed the pre-requisite of creating the Project Schedule in the Schedule Module
- Select the **\*\*REPORTED PROJECT SCHEDULE\*\*** link, which will take you the Reports Menu

## From the Reports menu



- Input key words of the Project Name into the unlabeled dropdown menu to the right of the field displaying Equal To
- Select the dropdown menu now containing these key words
- Select the project, for which you are creating the Project Charter

## From the Reports Menu



- Select the Okay button

## From the Reports Menu

The screenshot shows the e-Builder Reports menu. The 'Export PDF' button is highlighted with a red box. The main content area displays a 'Project Charter - Schedule' report for 'End User Training Project 67'.

PROJECT TIME	Duration	Start Date	Finish Date	Master Tasks
1 Overall Project	19.75mo	02/20/18	09/23/19	
2 Project Startup	15d	02/20/18	03/19/18	
3 Project Assigned to PM	5d	02/20/18	02/28/18	
4 Project Charter Development	5d	02/20/18	03/02/18	
5 Project Charter Approval	10d	03/05/18	03/19/18	
6 CPM Development	5d	03/05/18	03/19/18	
7 Planning	9.25w	03/19/18	05/21/18	
8 PM Develops Scope	10d	03/19/18	03/30/18	
9 AD Scope Review	5d	04/02/18	04/09/18	
10 Requester Scope/Cost Review/Approval	10d	04/09/18	04/20/18	
11 Contact A/E Firm	1d	04/23/18	04/23/18	
12 A/E Proposal Development	15d	04/24/18	05/07/18	
13 A/E Proposal Received	5d	05/08/18	05/08/18	
14 A/E Proposal Review	5d	05/08/18	05/14/18	
15 C/I Plan Development	5d	05/15/18	05/21/18	
16 Design Funding Approval	5d	05/22/18	05/31/18	
17 MPP Sent to Requester for Design	3d	05/22/18	05/24/18	
18 Requester MPP Approval	5d	05/25/18	05/31/18	
19 Design Commitment Approval	11d	05/31/18	06/19/18	
20 Funding Approved	5d	06/04/18	06/04/18	
21 PD Issued to A/E	10d	05/24/18	06/19/18	
22 PD Received A/E	1d	06/19/18	06/19/18	
23 Schematic Design Phase	17w	06/19/18	07/10/18	
24 Schematic Design	10d	06/19/18	07/02/18	
25 SD UCF Review	5d	07/03/18	07/10/18	
26 SD Workshop	2d	07/11/18	07/12/18	
27 Design Development Phase	6.50w	07/13/18	08/28/18	
28 DD 50%	10d	07/13/18	07/29/18	
29 DD 50% UCF Review	5d	07/27/18	08/02/18	
30 DD 50% Workshop	5d	08/03/18	08/09/18	
31 DD 100%	10d	08/07/18	08/20/18	
32 DD 100% UCF Review	5d	08/21/18	08/27/18	
33 DD 100% Workshop	5d	08/28/18	09/04/18	
34 Construction Documents Phase	7.50w	08/30/18	10/24/18	
35 CD 50%	10d	08/30/18	09/13/18	
36 CD 50% UCF Review	5d	09/14/18	09/20/18	
37 CD 50% Workshop	5d	09/21/18	09/24/18	
38 CD 100%	10d	09/25/18	10/08/18	
39 CD 100% UCF Review	5d	10/09/18	10/17/18	
40 CD 100% Workshop	5d	10/15/18	10/21/18	
41 CD Final Changes	5d	10/18/18	10/24/18	
42 Issue CDs	10d	10/25/18	10/25/18	
43 Bidding	11.25w	10/25/18	12/04/18	
44 *** Justified Retention***	5.25w	10/25/18	12/04/18	
45 Scope Issued to GC	1d	10/25/18	10/25/18	
46 GC Scope View	10d	10/26/18	11/06/18	
47 GC Proposal Development	10d	11/06/18	11/24/18	
48 *** GC Outbid Only ***	10w	10/25/18	11/19/18	
49 Bid Package Issued	5d	10/25/18	10/31/18	

- Select the Export PDF button

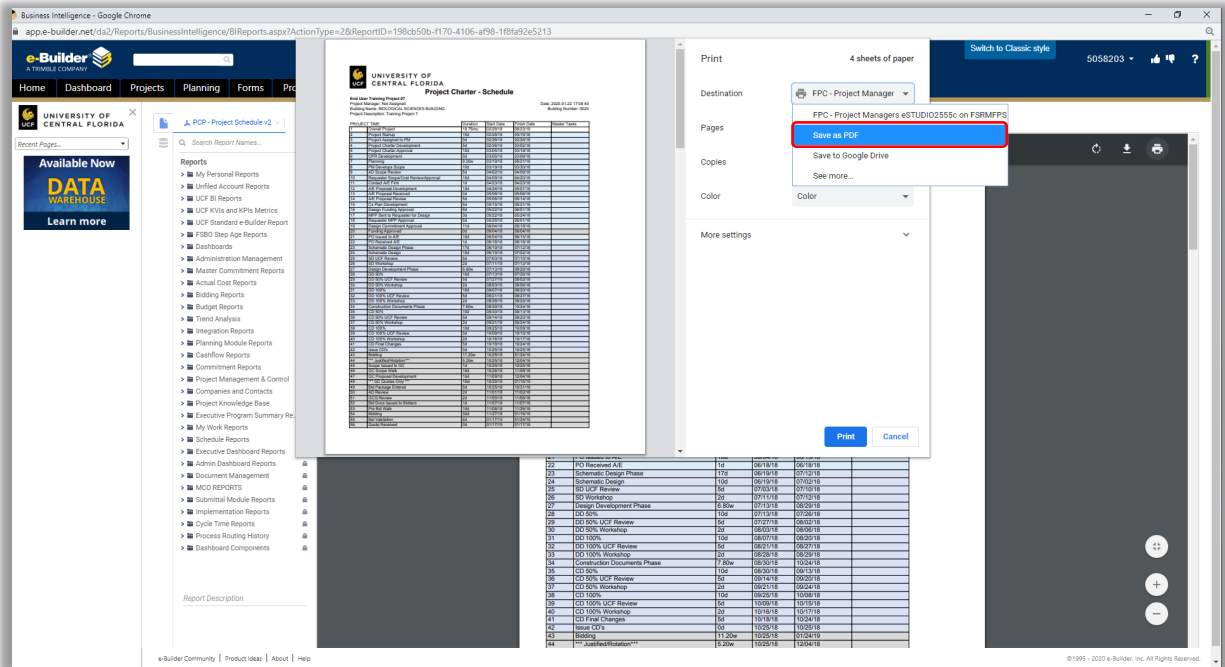
## From the Reports Menu

The screenshot shows the e-Builder Reports menu. The print icon is highlighted with a red box. The main content area displays a 'Project Charter - Schedule' report for 'End User Training Project 67'.

PROJECT TIME	Duration	Start Date	Finish Date	Master Tasks
1 Overall Project	19.75mo	02/20/18	09/23/19	
2 Project Startup	15d	02/20/18	03/19/18	
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8 PM Develops Scope	10d	03/19/18	03/30/18	
9 AD Scope Review	5d	04/02/18	04/09/18	
10 Requester Scope/Cost Review/Approval	10d	04/09/18	04/20/18	
11 Contact A/E Firm	1d	04/23/18	04/23/18	
12 A/E Proposal Development	15d	04/24/18	05/07/18	
13 A/E Proposal Received	5d	05/08/18	05/08/18	
14 A/E Proposal Review	5d	05/08/18	05/14/18	
15 C/I Plan Development	5d	05/15/18	05/21/18	
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17 MPP Sent to Requester for Design	3d	05/22/18	05/24/18	
18 Requester MPP Approval	5d	05/25/18	05/31/18	
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22 PD Received A/E	1d	06/19/18	06/19/18	
23 Schematic Design Phase	17w	06/19/18	07/10/18	
24 Schematic Design	10d	06/19/18	07/02/18	
25 SD UCF Review	5d	07/03/18	07/10/18	
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27 Design Development Phase	6.50w	07/13/18	08/28/18	
28 DD 50%	10d	07/13/18	07/29/18	
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30 DD 50% Workshop	5d	08/03/18	08/09/18	
31 DD 100%	10d	08/07/18	08/20/18	
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33 DD 100% Workshop	5d	08/28/18	09/04/18	
34 Construction Documents Phase	7.50w	08/30/18	10/24/18	
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36 CD 50% UCF Review	5d	09/14/18	09/20/18	
37 CD 50% Workshop	5d	09/21/18	09/24/18	
38 CD 100%	10d	09/25/18	10/08/18	
39 CD 100% UCF Review	5d	10/09/18	10/17/18	
40 CD 100% Workshop	5d	10/15/18	10/21/18	
41 CD Final Changes	5d	10/18/18	10/24/18	
42 Issue CDs	10d	10/25/18	10/25/18	
43 Bidding	11.25w	10/25/18	12/04/18	
44 *** Justified Retention***	5.25w	10/25/18	12/04/18	

- Select the print icon

From the Print pop-up window



- Select the Destination dropdown menu, then select the Save as PDF option

From the Print pop-up window

The screenshot shows a print pop-up window for a document titled "Project Charter - Schedule". The document content includes the University of Central Florida logo and a table of project tasks. The print control panel on the right has the following settings:

- Print: 4 pages
- Destination: Save as PDF
- Pages: All
- Pages per sheet: 1

A red box highlights the "Save" button in the bottom right corner of the print panel.

- Select the Save button
- Select the file directory on your computer, in which you wish to save this document
- Change the File name of the document to, Project Name + "Project Schedule" + MMDDYYYY
- Save the document

In e-Builder, navigate back to the Process menu

The screenshot shows the e-Builder software interface. The "Processes" menu item is highlighted in the top navigation bar. The main content area shows a list of processes for a specific project. The following table represents the data shown in the screenshot:

Process	Subject	Step	Responsible Actors	Step Age	In Step Since	Date Created	Process Age	Status	Requested Comment
PCP - 1	Project Charter for End User Training Project 07, Priority 1 - Emergency   Project Cost \$88,600.00	AD Review	Ben Fauser	1	01.22.2020	01.21.2020	1	Submitted	
PCP	Project Charter for End User Training Project 07, Priority   Project Cost 0					01.22.2020		NotAssigned	

- Select the in-progress Project Charter process you are working with

## From the 02 – Project Charter Process (PCP) screen – PROJECT SCHEDULE section

- Drag and drop the file you just created into the PROJECT TIME field
- Or, select the Browse Computer button and select the file from the directory on your computer in which you saved the estimated project schedule
- Select the BUDGET AND SCHEDULE CONFIRMATION checkbox

## From the 02 – Project Charter process (PCP) screen

- Select the Save Draft button
  - *It is advisable to save your work here as all unsaved work will be lost if you navigate away from the screen.*

## From the 02 – Project Charter Process (PCP) screen – PERMITTING section

- Select the BCO PERMIT REQUIRED dropdown menu

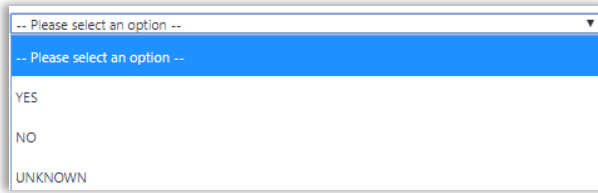
- Select the applicable option

- Select SFM PERMIT REQUIRED dropdown menu

- Select the applicable option

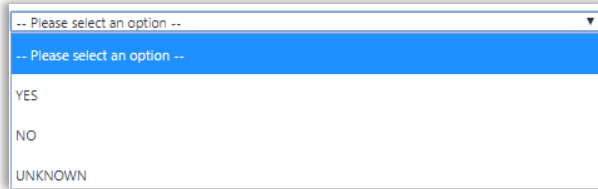


- Select ST JOHS PERMIT REQUIRED dropdown menu



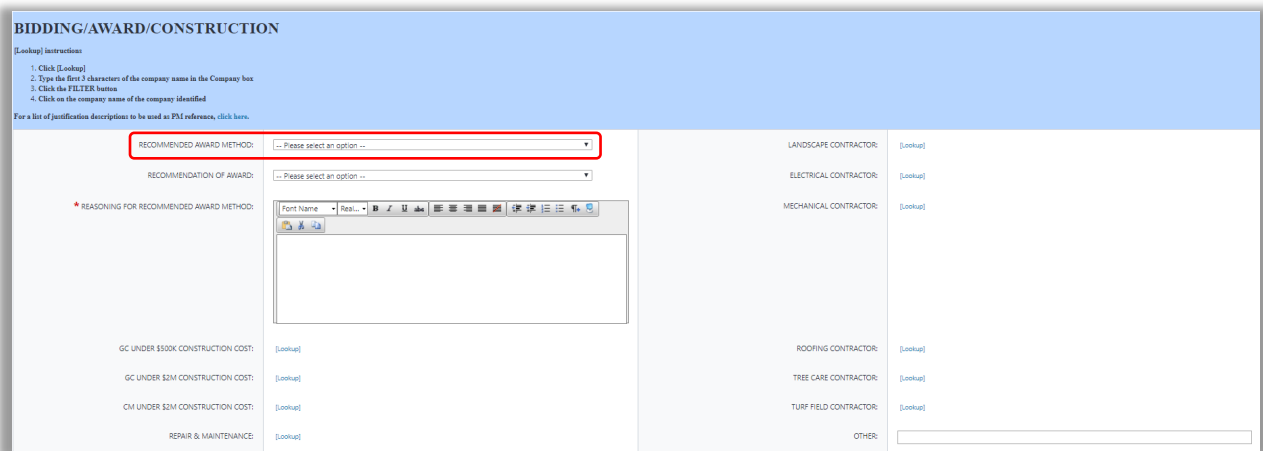
- Select the applicable option

- Select GENERATOR PERMIT REQUIRED dropdown menu

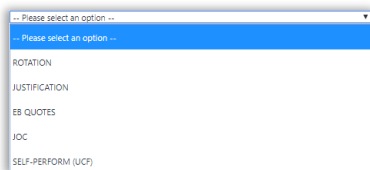


- Select the applicable option

From the 02 – Project Charter Process (PCP) screen – BIDDING/AWARD/CONSTRUCTION section



- Select the RECOMMENDED AWARD METHOD dropdown menu



- Select the award method you are recommending
  - ROTATION – Next company up for a project in a pool of Continuing Service Vendors
  - JUSTIFICATION – Vendor selected due to specific considerations related to the project
  - EB QUOTES – Open bid among pool of relevant Continuing Service Vendors
  - JOC – Job Order Contract for projects under \$500K
  - SELF-PERFORM – Recommendation that UCF in-house personnel complete work

From the 02 – Project Charter Process (PCP) screen – BIDDING/AWARD/CONSTRUCTION section

**BIDDING/AWARD/CONSTRUCTION**

[Look up] instructions

1. Click [Look up]
2. Type the first 3 characters of the company name in the Company box
3. Click the **FILTER** button
4. Click on the company name of the company identified

For a list of justification descriptions to be used as PMI reference, click here.

RECOMMENDED AWARD METHOD: -- Please select an option --

RECOMMENDATION OF AWARD: -- Please select an option --

\* REASONING FOR RECOMMENDED AWARD METHOD:

GC UNDER \$500K CONSTRUCTION COST: [look up]

GC UNDER \$2M CONSTRUCTION COST: [look up]

CM UNDER \$2M CONSTRUCTION COST: [look up]

REPAIR & MAINTENANCE: [look up]

LANDSCAPE CONTRACTOR: [look up]

ELECTRICAL CONTRACTOR: [look up]

MECHANICAL CONTRACTOR: [look up]

ROOFING CONTRACTOR: [look up]

TREE CARE CONTRACTOR: [look up]

TURF FIELD CONTRACTOR: [look up]

OTHER:

- Select the RECOMMENDATION OF AWARD dropdown menu

-- Please select an option --

-- Please select an option --

Type of project: sitework/roadwork/traffic signals, classroom/office renovations, research/wet lab, computer lab, new construction, etc.

Location of project: contractor's current or recent work in the same building or successful past experience with faculty/staff on another project in same building

Client group

Contractor's expertise and specialized experience on similar projects

Contractor's workload and due dates, as they relate to their ability to meet time requirements, when expediting the project is necessary

Fair share of work

Contractors demonstrated past performance in terms of quality, time, and budget

EB QUOTES - project to be bid using EB QUOTES

- Select the option that best aligns with your AWARD METHOD selection

From the 02 – Project Charter Process (PCP) screen – BIDDING/AWARD/CONSTRUCTION section

**BIDDING/AWARD/CONSTRUCTION**

**[Lookup] instructions:**

1. Click [\[Lookup\]](#)
2. Type the first 3 characters of the company name in the Company box
3. Click the **FILTER** button
4. Click on the company name of the company identified

For a list of justification descriptions to be used as PMI reference, click [here](#).

RECOMMENDED AWARD METHOD:

RECOMMENDATION OF AWARD:

**\* REASONING FOR RECOMMENDED AWARD METHOD:**

GC UNDER \$500K CONSTRUCTION COST:

GC UNDER \$2M CONSTRUCTION COST:

CM UNDER \$2M CONSTRUCTION COST:

REPAIR & MAINTENANCE:

LANDSCAPE CONTRACTOR:

**ELECTRICAL CONTRACTOR:**

MECHANICAL CONTRACTOR:

ROOFING CONTRACTOR:

TREE CARE CONTRACTOR:

TURF FIELD CONTRACTOR:

OTHER:

- Input why you are recommending the award method in the REASON FOR RECOMMENDED AWARD METHOD text field
  - *It can be helpful to create and save statements for a number of common reasons in a separate file, from which you can then copy and paste a prepared statement into this field, modifying the statement verbiage if needed*
- If specific vendors will be recommended, select the [Lookup] link next to a category of vendor you wish to recommend.

From the Lookup Company pop-up window

**Lookup Company**

**Filter Companies** Clear

Company:

City:

Area Code:

Zip Proximity: Within  miles of

Construction Codes:  Lookup ⓘ

Company Custom Fields:

State:  Lookup

County:  Lookup

Project Companies Only:

**Filter**

**Companies** (Click on company name to view the details) Cancel

Company Name	City	State	Phone
<a href="#">RCG Electric LLC</a>	Orlando	FL	
<a href="#">RCG Productions LLC</a>	Kissimmee	FL	

- Search for a specific vendor you wish to recommend

- Input the name or a partial name into the Company field, then select the Filter button

From the Lookup Company pop-up window

**e-Builder**  
A TRIMBLE COMPANY

### Lookup Company

**Filter Companies** Clear

Company:

City:

Area Code:

Zip Proximity: Within  miles of

Construction Codes:  Lookup

Company Custom Fields:  Lookup

State:

County:

Project Companies Only:

Filter

**Companies** (Click on company name to view the details) Cancel

Company Name	City	State	Phone
There are no companies for this selection			

Cancel

- Search for a category of vendors to select from
  - Select the Company Custom Fields dropdown menu
  - Select Continuing Service Category

From the Lookup Company pop-up window

**e-Builder**  
A TRIMBLE COMPANY

**Lookup Company**

**Filter Companies** Clear

Company:

City:

Area Code:

Zip Proximity: Within  miles of

Construction Codes:  Lookup i

Company Custom Fields:

Continuing Service Category  Lookup

State:  Lookup

County:  Lookup

Project Companies Only:

Filter

**Companies** (Click on company name to view the details) Cancel

Company Name	City	State	Phone
There are no companies for this selection			

Cancel

- Select the Lookup button underneath the field displaying Continuing Service Category

From the Lookup pop-up window

**e-Builder**  
A TRIMBLE COMPANY

**Lookup** (Select the values to add below)

Insert Selected Cancel

<input type="checkbox"/>	Value
<input type="checkbox"/>	Architect
<input type="checkbox"/>	Building Automation Systems
<input type="checkbox"/>	Building Envelope
<input type="checkbox"/>	Building Envelope Contractor
<input type="checkbox"/>	Civil Engineer
<input type="checkbox"/>	Commissioning
<input checked="" type="checkbox"/>	Electrical

- Select the checkbox next to the Value you wish to filter by
- Select the Insert Selected button

From the Lookup Company pop-up window

**e-Builder**  
A TRIMBLE COMPANY

**Lookup Company**

**Filter Companies** Clear

Company:

City:

Area Code:

Zip Proximity: Within  miles of

Construction Codes:  Lookup ⓘ

Company Custom Fields:

Continuing Service Category:  Lookup

State:  Lookup

County:  Lookup

Project Companies Only:

Filter

**Companies** (Click on company name to view the details) Cancel

Company Name	City	State	Phone
Ballentine Electric Inc	Orlando	FL	
Cape Design Engineering Co	Merritt Island	FL	
Giles Electric Company, Inc.	South Daytona	FL	(386) 767-5895
GRAEF-USA	Maitland	FL	(407) 659-6500
Hanson Professional Services Inc	Springfield	IL	
Moses & Associates Inc	Gainesville	FL	
<b>RCG Electric LLC</b>	Orlando	FL	

- Select the Filter button
- Select your recommended vendor from the results

From the 02 – Project Charter Process (PCP) screen – BIDDING/AWARD/CONSTRUCTION section

- You will see your selected vendor displayed
- Repeat this process for any other vendors you wish to recommend

From the 02 – Project Charter process (PCP) screen

- Select the Check Spelling button and correct any issues
- Select the Save Draft button
  - *It is advisable to save your work here as all unsaved work will be lost if you navigate away from the screen.*
- Select the Submit button to send the Project Charter to the FP&C MGR for review

Congratulations! You have created an e-Builder Project Charter.

The MGR will approve or return the Project Charter with comments.