



University of Missouri System

eBuilder Training

Additional Processes

Design Review Processes

Non-Cost Processes	Cost-Enabled Processes
01.10 - Project Status and Details Update (PJTUP)	10.20 - Work Authorizations (WA)
40.20 - Schematic Design Review (SD)	10.50 - Schedule of Values (SOV)
40.30 - Design Development Review (DD)	80.00 - Admin - Cost Process Exceptions Import (CEI)
40.35 - %Construction Document Review (%CD)	80.0 Non-CEI Cost process
40.40 - Construction Document Review (CD)	
50.10 - Request for Information (RFI)	
50.20 - Architectural Supplement Instruction (ASI)	
60.05 - Substantial Completion Acceptance (SubCa)	
60.10 - Project Closeout (PRCLO) 60.20 - Project Closeout Consultant (PRJCN) 60.30 - Project Closeout Contractor (PRJCL)	



Data Entry



Conditional

Spawn
ProcessAutomation
Step

Connector

Process Key

Rectangle: Data Entry, Ball in Court, requires action by a user.

Diamond: eBuilder processing an automatic condition to route the process.

Rectangle w/Double Lines: Automatically starts another process.

Oval: Represents the mail merge of data with a template to create a document (Agreements, Contracts, et.).

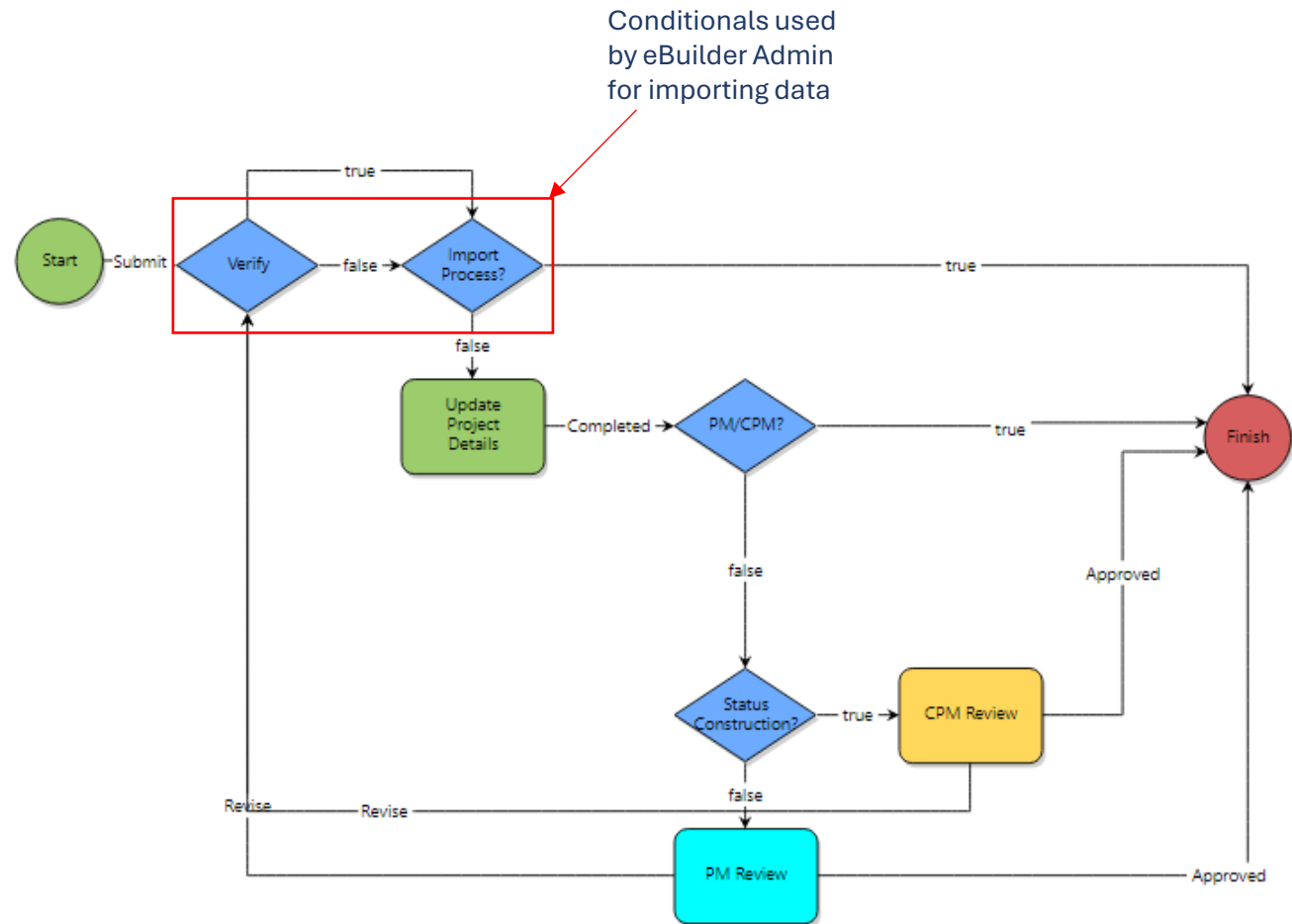
Arrows: Actions that can be taken from each step.

PJTUP - Workflow Details

Description: This process will allow updates to be made to reflect the current project details or project status throughout the life of a project.

Initiators: This process can be initiated by all roles.

Actors: Project Manager, Project Coordinator, and Construction Project Manager



01.10 – Project Status and Details Update (PJTUP)

Process Steps		Roles	Page Layout Sections
1	Start Process	All Roles	Complete the required fields and submit the process. <i>The initiation/start step is used to determine the role of the initiator and to allow the process to populate data from the project details.</i>
2	Update Project Details	All Roles	The process page layout will present you with the current values of the Project Details. There are no required fields, so make the necessary updates. Take Action “Completed” to move to the PM/CPM? conditional step.
3	PM/CPM?	Conditional	This will determine if the PM or CPM initiated the process, in which case if “True,” will apply the update(s) and Finish. If “False,” will route to Status Construction Conditional step.
3	Status Construction?	Conditional	This will check the project status. If it is Construction or Construction Close the process will route to CPM Review step. For any other project status, it will route the process to the PM Review step.
4	PM and CPM Review	PM / CPM	Review all sections and either approve or send back for revision. Take Action - “Approved” to Finish or “Revise” will send back to the Initiator step. Revise will require comments to be added for the initiator.
5	Finish	Automated	This process is now complete, and the Project Details will be updated.

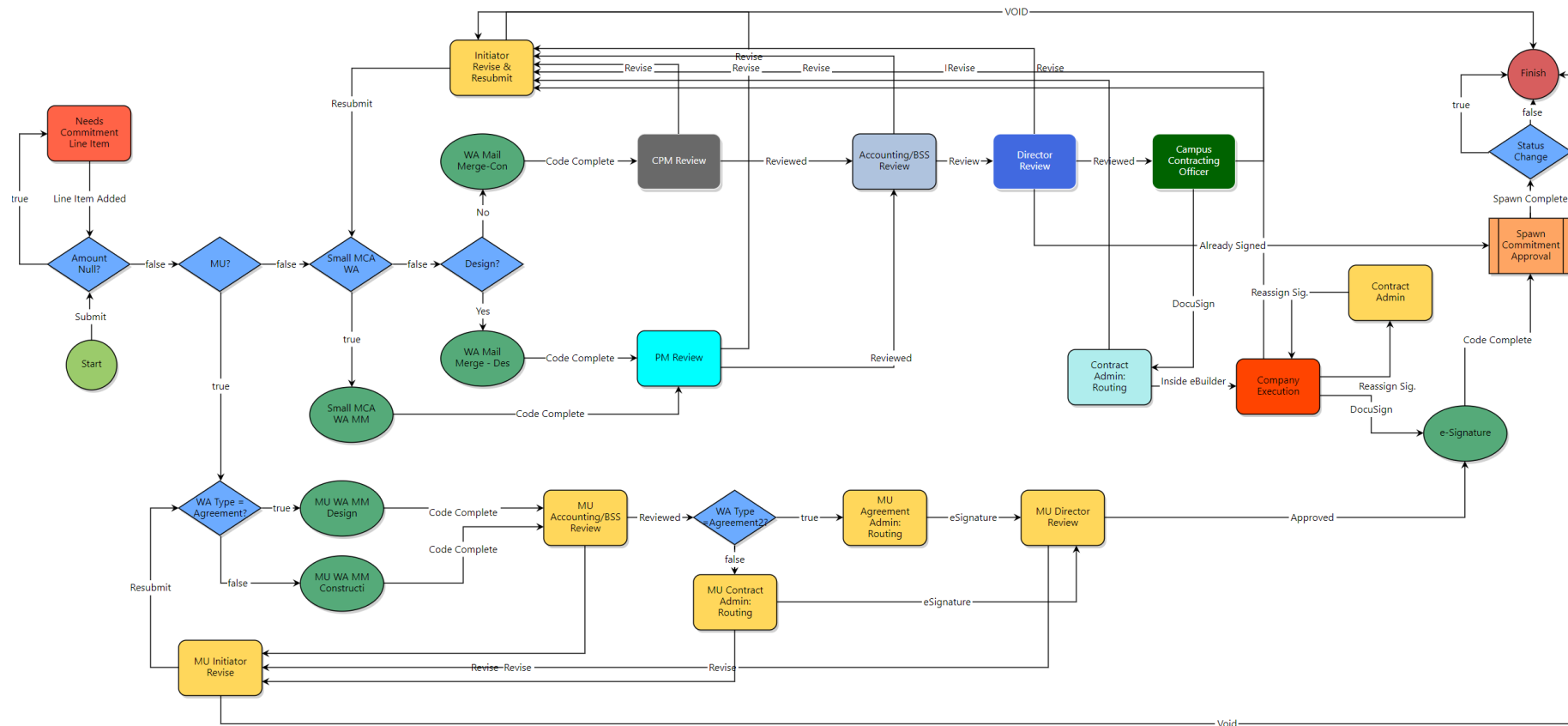
Note: *The only field that cannot be updated by this process is the **Project Photo**. You will have to contact eBuilder Admin to do this.*

WA - Workflow Details (Design and Labor Blankets, and MCA WA <\$75k)

Description: This Process used to route a work authorization for review, approval, and final execution. Work Authorizations are typically assigned to a blanket agreements, contracts, or Master Construction Agreements (MCA).

Initiators: PC, PM, CPM, Agreement and Contract Admins, Accounting/BSS, and Construction Director

Actors: PC, PM, Agreement and Contract Admins, Accounting, Director of PDC, Campus Contracting Officer, and Consultant or Contractor.



Process Steps		Roles	Page Layout Sections
0	Pre-work	PC, PM, CPM, and Agreement and Contract Admins	Obtain a proposal for the work authorization.
1	Start Process	Accounting/BSS, Agreement Admin, Contract Admin, CPM, PC, and PM	<p>Complete the required fields and add any additional information you may have:</p> <ol style="list-style-type: none"> 1. Commitment Details 2. Commitment Others 3. Commitment Custom Fields 4. Commitment Items <p style="margin-left: 20px;">Using the Add New Commitment Item – add necessary PCS line items and attach the proposal.</p> 5. Master Construction Work Authorization Fields 6. Company Information 7. Exhibit B – Unit Price Hourly Rates 8. Supplier Diversity Participation <p><u>Take Action</u> “Submit” to send to the next step in the workflow or “Save Draft” to complete later.</p>
2	Amount Null?	Conditional	<p>“True” will route to Needs Commitment Line Item step and route to Initiator to add.</p> <p>“False” will route to conditional MU?</p>
3	MU?	Conditional	<p>“True” will route to conditional WA Type = Agreement? (For MU Campus WA’s)</p> <p>“False” will route to conditional Small MCA WA (For all other Campuses)</p>
3	Small MCA Work Authorization?	Conditional	<p>“True” will send to Small MCA WA MM (Master Construction Agreement Work Authorization Mail Merge)</p> <p>“False” will send to Conditional step Design?</p>
4	Small MCA MM	Automated	Merge process data with Small MCA WA template and route to PM Review step.
5	Design?	Conditional	<p>“True” will route to WA Mail Merge – Design</p> <p>“False” will route to WA Mail Merge – Construction</p>

Note: Complete using information from the proposal.

Note: This condition is based on the Work Authorization Type.

Process Steps		Roles	Page Layout Sections
6	WA Mail Merge - Design	Automated	Merge process data with WA template and route to Accounting/BSS Review step.
7	WA Mail Merge - Construction	Automated	Merge process data with WA template and route to Accounting/BSS Review step.
8	Accounting/BSS Review	Accounting/BSS	Review the mail merged document, attached proposal, comments to ensure the data for the work authorization is accurate. Review project MoCode(s) - add or correct if necessary. <u>Take Action</u> “Reviewed” to send to the next step in the workflow or “Revise” to send it back to the Initiator to revise.
9	Director Review	Director	Review the mail merged document, attached proposal and comments to ensure the work authorization is accurate. <u>Take Action</u> “DocuSign (MU)” will apply electronic signature to work authorization and will send to Contract Admin: Routing step to prepare for vendor signature. All other campuses – <u>Take Action</u> “Reviewed” to send to the next step in the workflow or for all campuses - “Revise” to send it back to the Initiator to revise.
10	Campus Contracting Officer	Campus Contracting Officer	Review the mail merged document, attached proposal and comments to ensure the work authorization is accurate. <u>Take Action</u> “DocuSign” to send to the next step in the workflow or “Revise” to send it back to the Initiator to revise.
12	Contract Admin: Routing	Agreement or Contract Administrator	DocuSign preparation for vendor execution. <u>Take Action</u> “Inside eBuilder” to send to the vendor for execution or “Revise” to send it back to the Initiator Revise step to revise.
13	Company Execution	Consultant or Contractor	To execute work authorization <u>Take Action</u> “DocuSign” to send to execute WA or “Revise Request” to send it back to the Initiator to revise.
14	E-Signature	Automated	This step will add an executed copy of the WA to the project document library and email a copy to the consultant or contractor.
15	Spawn Commitment Approval	Automated	This process performs the integration with PS. It will send commitment data to PS to create the PO. Then in return, PS will send the PO information back to the project and process.
16	Change Status	Conditional	When the integration is complete the process status will be updated to “Void.” This is required to eliminate double entry in the project budget that would occur if both the process and integration return information were entered into the commitment.
17	Finish	Automated	Update WA process instance State to “Closed.”

Process Steps		Roles	Page Layout Sections
15	WA Type=Agreement?	Conditional	<p>“True” will route to MU WA MM – Design</p> <p>“False” will route to MU WA MM – Construction</p>
16	MU WA MM - Design	Automated	Merge process data with MU Design WA template and route to Accounting/BSS Review step.
17	WA Mail Merge - Construction	Automated	Merge process data with MU WA Construction template and route to Accounting/BSS Review step.
18	MU Accounting/BSS Review	Accounting/BSS	<p>Review the mail merged document, attached proposal, comments to ensure the data for the work authorization is accurate. Review project MoCode(s) - add or correct if necessary.</p> <p><u>Take Action</u> “Reviewed” to send to the next step in the workflow or “Revise” to send it back to the Initiator to revise.</p>
19	WA Type=Agreement2?	Conditional	<p>“True” will route to MU Agreement Admin: Routing step</p> <p>“False” will route to MU Contract Admin: Routing step</p>
20	MU Agreement/Contract Admin: Routing	Agreement or Contract Administrator	<p>DocuSign preparation for Director execution.</p> <p><u>Take Action</u> “eSignature” to route to Director for execution or “Revise” to send it back to the Initiator Revise step to revise.</p>
21	Director Review	Director	<p>Review the mail merged document, attached proposal and comments to ensure the work authorization is accurate.</p> <p><u>Take Action</u> “Approved” will apply electronic signature to work authorization and will send to e-Signature automated step, “Revise” to send it back to the Initiator to revise.</p>
22	E-Signature	Automated	This step will add an executed copy of the WA to the project document library and email a copy to the consultant or contractor.
23	Spawn Commitment Approval	Automated	This process performs the integration with PS. It will send commitment data to PS to create the PO. Then in return, PS will send the PO information back to the project and process.
24	Change Status	Conditional	When the integration is complete the process status will be updated to “Void.” This is required to eliminate double entry in the project budget that would occur if both the process and integration return information were entered into the commitment.
25	Finish	Automated	Update WA process instance State to “Void.”

Workflow Details - Description

Description: Process to upload SD, DD, %CD and CD Design Phase documents (study drawings, documents and other media that illustrate design concepts), file into eBuilder, and submit to the PM for review and distribution to campus stake holders.

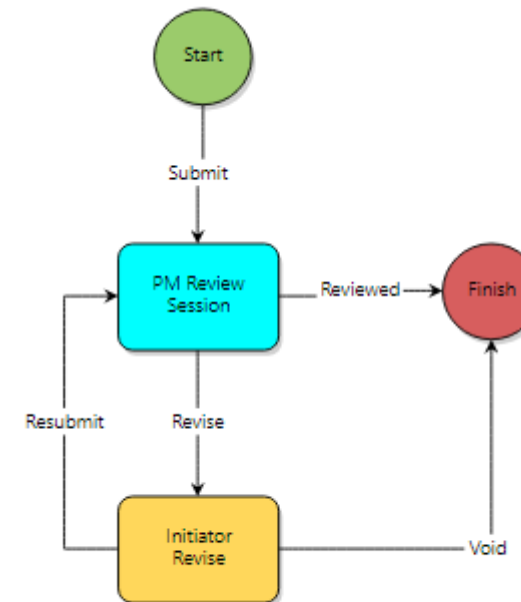
Initiator: Anyone that is a participant on the project

Actors: PM, UM System (FPD Review / Director), Consultant

All Design Review Process

SD	40.20 – Schematic Design Review
DD	40.30 – Development Design Review
%CD	40.35 - % Construction Design Review
CD	40.40 – Construction Design Review

40.20 – Schematic Design Review



Process Steps		Roles	Page Layout Sections
1	Start/Initiate	Consultant	Consultant will initiate the process and attach relevant documents for the review phase. They will click Submit , which will initiate the process and route to the Project Manager. They can also click on Save Draft , to save and work later.
2	PM Review Session	Project Manager	PM reviews all documents for approval or return to Initiator. <u>Take Action</u> “Reviewed” will go to finish and close the process, “Revise” will route back to initiator and will require you to add comments.
3	Finish	Automated	Process state will be updated to Complete.

Note: Bluebeam Review sessions can be scheduled as needed.

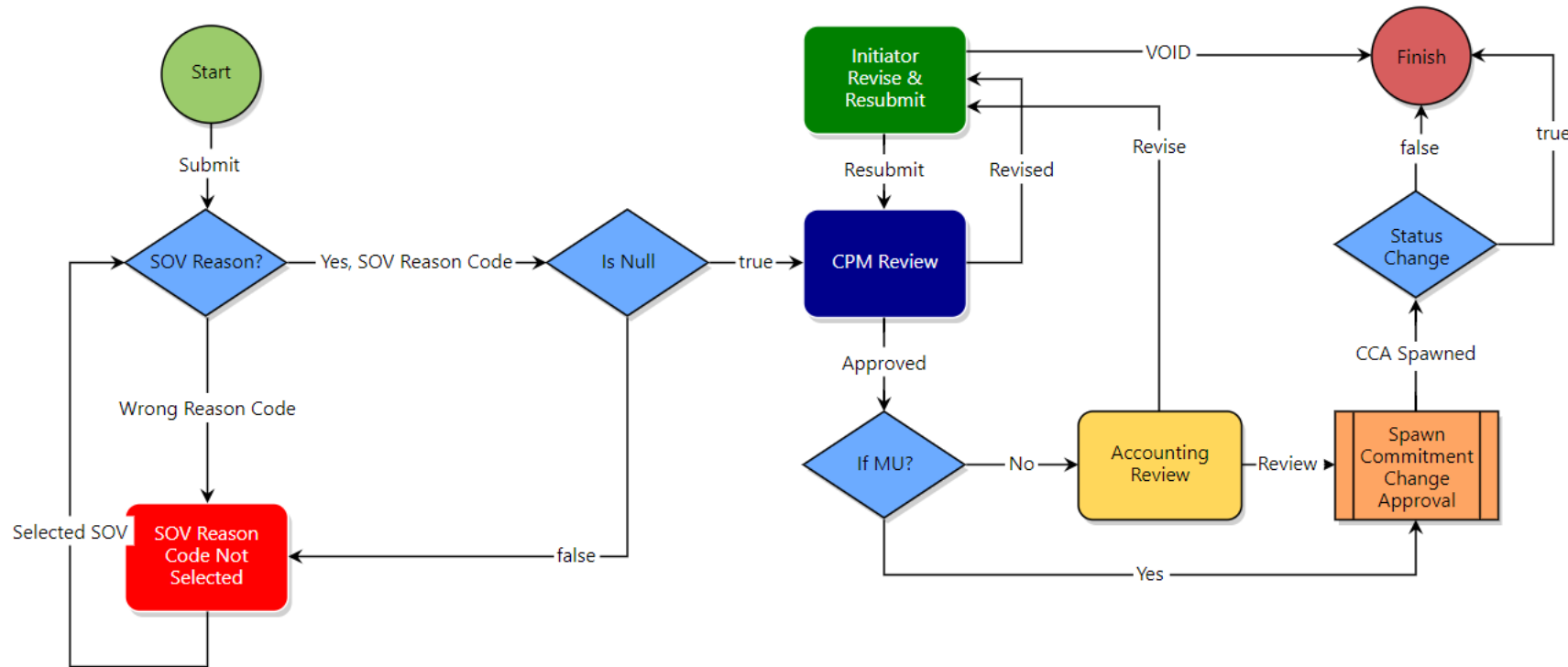
Note: While GCs have the permissions to initiate this process, most campuses prefer to do this in-house. They will have the GC provide their SOVs in a spreadsheet, then an admin or CPM will initiate this process and import SOVs.

Prerequisite: Required to have an approved construction contract. This process will expand the PCS line-item 2000 Base Bid.

SOV - Workflow Details

Description: Process to establish the Schedule of Values.

Initiators/Actors: CPM, Contract Administrator, Accounting, Director of PDC, Construction Director and General Contractors



10.05 – Schedule of Values (SOV)

10.50 - Schedule Of Values (SOV)

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Start Process

Project: MU Research Reactor - Lab Building Expansion Study
 Project Number: CP241141
 Process: 10.50 - Schedule of Values
 Subject: MU CP241141 SOV Establishment -SIRCAL CONTRACTING INCORPORATED - CA - 00002 - SOV Establishment \$ Value: 0

Details Documents (0) Attached Processes (0) Attached Forms (0)

Expand All | Collapse All

Please select the reason code: SOV Establishment (Changes).

Commitment Change Details

Commitment: CA - 00002 - MU CP241141 SCA Approval for SIRCAL CONTRACTING INCORPORATED (CMRCA - 1)
 Status: Draft
 Created: 08.11.2024 (Bill Copeland)
 Date Of Change: 08.11.2024

Company: SIRCAL CONTRACTING INCORPORATED
 Reason Code: SOV Establishment (Changes)

Commitment Change Custom Fields

Extension Days: 0

Commitment Change Items

Download Schedule of Values Template Import Schedule of Values Add All Existing Items Add Existing Item

You can add SOV manually or through an import process

ScheduleOfValues_MUResearchReactor-LabBuildingExpansionStudy_CA-00002_202408112242 - Compatibility M...

File Home Insert Page Layout Formulas Data Review View Automate Help BLUEBEAM Acrobat

Account Code	Description	Current SOV	Change Amount	New SOV (D+E)	Actuals Approved	Balance To Finish (F-G)	Retainage %	MoCode
799000-2000 - Base Bid	Pre-Construction Services	0.00	0.00	0.00		0.00	5.0000	
799000-2000 - Base Bid	Allowances		6,000.00	6,000.00		6,000.00	5.0000	
799000-2000 - Base Bid	General Conditions		10,000.00	10,000.00		10,000.00	5.0000	
799000-2000 - Base Bid	Construction		6,900.00	6,900.00		6,900.00	5.0000	
799000-2000 - Base Bid	Steel - Materials		9,000.00	9,000.00		9,000.00	5.0000	
799000-2000 - Base Bid	Steel - Labor		8,000.00	8,000.00		8,000.00	5.0000	
						Total 39,900.00		

The original base bid or Current SOV needs to be zeroed "0" out.

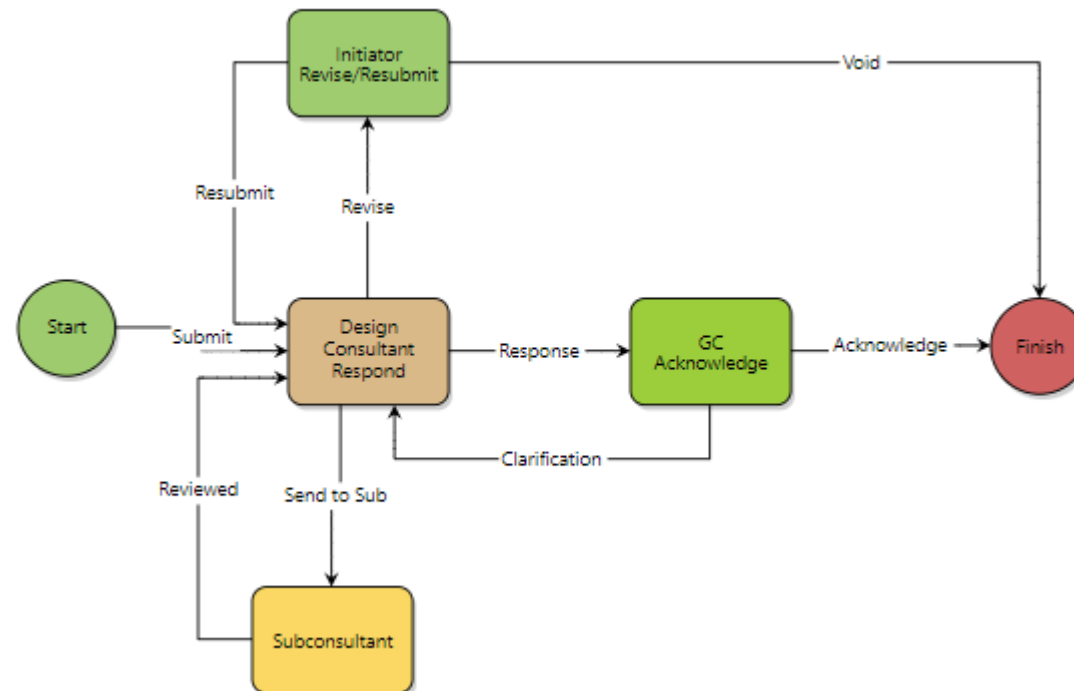
The newly added SOVs need to equal the original base bid amount.

Process Steps		Roles	Page Layout Sections
0	Pre-work	CPM/Admin	Create import spreadsheet. The first line needs to offset the total. Example: Base Bid \$789,000, the first line of the SOV is required to be - \$789,000 and then the SOV line items will total to the same amount which will result in a \$0 net change.
1	Start Process	CPM, Contract Admin, Accounting, Directors, and GCs	Complete the required fields in the following sections: <ol style="list-style-type: none"> 1. Select the commitment (contract) 2. Select the Date 3. Select the Reason Code “SOV Establishment” Click on “ Submit ” button to initiate the process or click “ Save Draft ” button to save and finish later.
2	SOV Reason?	Conditional	Checking to ensure “ SOV Establishment ” reason code was selected. If not, it will route back to initiator with an error message.
3	Is Null?	Conditional	Checking to ensure the commitment change amount = \$0. If not, it will route back to initiator to correct.
4	CPM Review	CPM	Review SOVs for general contractor billing. Ensure all information is accurate. Take Action “ Approved ” to move to the next step “ Revise ” to send back to the Initiator step.
5	If MU?	Conditional	“ Yes ” will bypass the Accounting Review step and send to Commitment Change Approval step. “ No ” will route to Accounting Review step for all other campuses.
6	Accounting Review (UMKC, UMSL and S&T)	Director of FPD	Review all sections and check SOV line-item project MoCodes. Take Action “ Reviewed ” to move to the Commitment Change Approval step, or “ Revise ” to send back to the Initiator step.
7	Commitment Change Approval	Spawned	This spawned process will integrate with PeopleSoft to establish the SOVS in the PO. When completed, the PO will also update the construction commitment Base-bid line with SOVs.
8	Status Change	Conditional	This will change the status of the SOV process in eBuilder to “Void.” This is required to eliminate the duplication of SOV amounts in eBuilder by the process and by the integration with PeopleSoft.
9	Finish	Automated	This process is now complete, and the budget PCS summary will be updated.

RFI - Workflow Details

Description: Process for the General Contractor/CMR to submit questions, issues or any clarifications of project documents.

Initiators/Actors: Project Manager, Contract Admin, Accounting, Director of PDC, Campus Contracting Officer, UM System (FPD Review / Director), Consultant

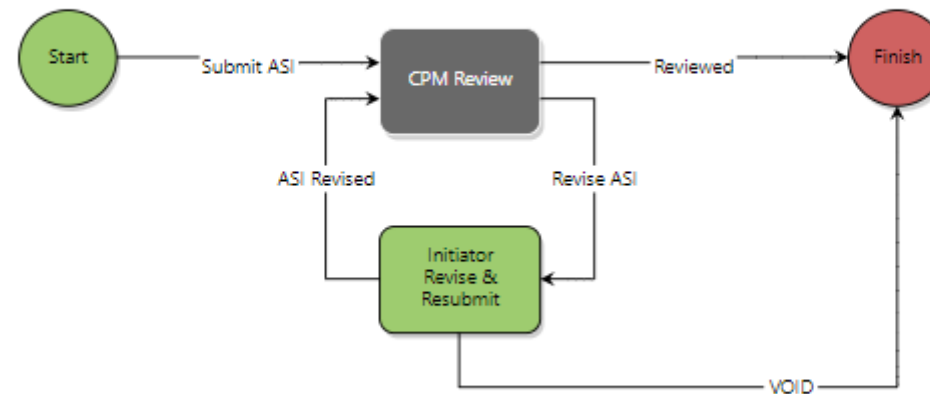


Process Steps		Roles	Page Layout Sections
1	Start/Initiate	CPM, Director, PM, GCs,	Complete the required fields and any other additional fields: Category: Clarification/Design Question/Clarification?: Proposed Solution: Click Submit , which will initiate the process and route to the Design Consultant Respond step; or click Save Draft , to save and work later.
2	Design Consultant Respond	Design Staff	Design Consultant reviews the RFI and can either respond, forward to a sub or send back to Initiator. <u>Take Action</u> “Response” will route to the GC Acknowledge step, “Send to Sub” to get additional input from Sub, and “Revise” will route back to initiator and will require you to add comments.
3	Subconsultant	Design Staff	Sub will review and respond to RFI. <u>Take Action</u> “Reviewed” will route back to the Design Consultant Respond step.
	GC Acknowledge	General Contractor	GC will review the RFI and clarification and will determine if this RFI will impact Schedule and/or Cost. <u>Take Action</u> “Acknowledge” will route to the Finish step and “Clarification” route back to the Design Consultant Respond step.
3	Finish	Automated	Process Status will update to “Finish” and the Process State will be updated to “Complete.”

ASI- Workflow Details

Description: An ASI is the Architect or Engineer's "Supplemental Instruction" in response to an RFI or used by the designer to transmit clarifications or changes to the scope of the work. This work is to be implemented by the contractor. The contractor should note that the issuance of an ASI or ESI may or may not result in a Change Order.

Initiators/Actors: CPM, Design Staff, Consultant Admin, Design Consultant



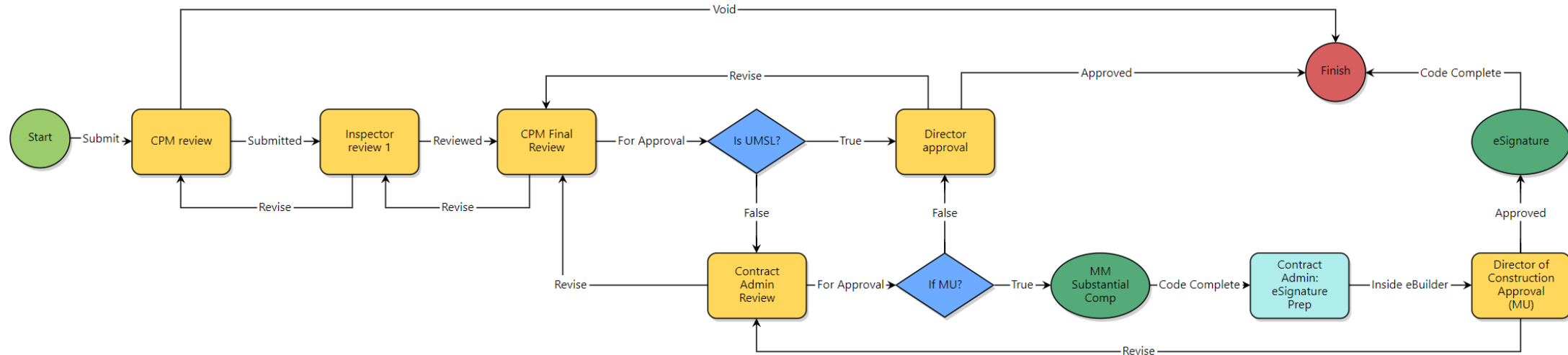
50.20 – Architectural Supplement Instruction

Process Steps		Roles	Page Layout Sections
1	Start/Initiate	Design Staff, Consultant Admin, or Design Consultant	<p>Complete the description field and attach any relevant documentation.</p> <p>Click Submit, which will initiate the process and route to the CPM Review step; or click Save Draft, to save and finish later.</p>
2	CPM Review	CPM	<p>CPM reviews the ASI and can either respond to the initiator with questions for additional clarification or take the action Reviewed to finish the process. In addition, if there was an RFI process that initiated the ASI, attach the RFI process in the process tab of the page layout.</p> <p><u>Take Action</u> “Reviewed” will route to the Finish step, “Revise ASI” to get additional input from the initiator</p>
3	Finish	Automated	<p>Process Status will update to “Finish” and the Process State will be updated to “Complete.”</p>

SubCa- Workflow Details

Description: This process is used to initiate and route the Substantial Completion acceptance request to the Director for approval. It contains checklists for all required contract and code documentation, allows the inspector to determine certificate of occupancy and permit close out requirements, and provides document attachments for Contract Admin and Director review and approval.

Initiators/Actors: CPM, Construction Director, Campus Code Reviewer, Contract Admin, Inspector, Owners Agent and PM



60.05 – Substantial Completion Acceptance Process

Process Steps		Roles	Page Layout Sections
1	Start Process	CPM, Directors, Campus Code Reviewer, Contract Admin, Inspector, Owners Agent and PM	Complete the required fields in the following sections: <ol style="list-style-type: none"> 1. Select the commitment (contract) 2. Select the Date 3. Select the Reason Code “SOV Establishment” Click on “ Submit ” button to initiate the process or click “ Save Draft ” button to save and finish later.
2	CPM Review		Checking to ensure “ SOV Establishment ” reason code was selected. If not, it will route back to initiator with an error message.
3	Inspector Review 1		Checking to ensure the commitment change amount = \$0. If not, it will route back to initiator to correct.
4	CPM Final Review	CPM	Review SOVs for general contractor billing. Ensure all information is accurate. Take Action “ Approved ” to move to the next step “ Revise ” to send back to the Initiator step.
5	Is UMSL?	Conditional	“ Yes ” will bypass the Accounting Review step and send to Commitment Change Approval step. “ No ” will route to Accounting Review step for all other campuses.
6	Contract Admin Review		Review all sections and check SOV line-item project MoCodes. Take Action “ Reviewed ” to move to the Commitment Change Approval step, or “ Revise ” to send back to the Initiator step.
7	If MU?	Conditional	This spawned process will integrate with PeopleSoft to establish the SOVS in the PO. When completed, the PO will also update the construction commitment Base-bid line with SOVs.
8	MM Substantial Comp	Automated	This will change the status of the SOV process in eBuilder to “Void.” This is required to eliminate the duplication of SOV amounts in eBuilder by the process and by the integration with PeopleSoft.
9	Contract Admin: eSignature Prep	Contract Admin	
10	Director of		
	Finish	Automated	This process is now complete, and the budget PCS summary will be updated.

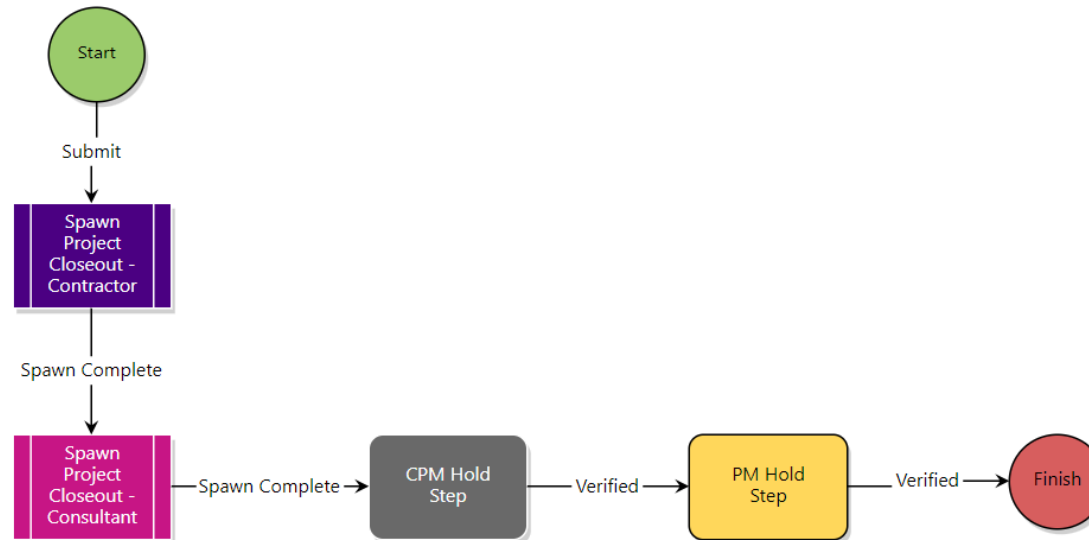
DBB - Workflow Details

Description: This is the parent process that initiates the Project Closeout and spawns the Consultant and Contractor Closeout subprocesses, linking them together.

Actors: PM, CPM, Contract Admin, Director of PDC, Campus Contracting Officer, UM System (FPD Review / Director), General Contractor.

Subprocesses

60.20	
60.30	



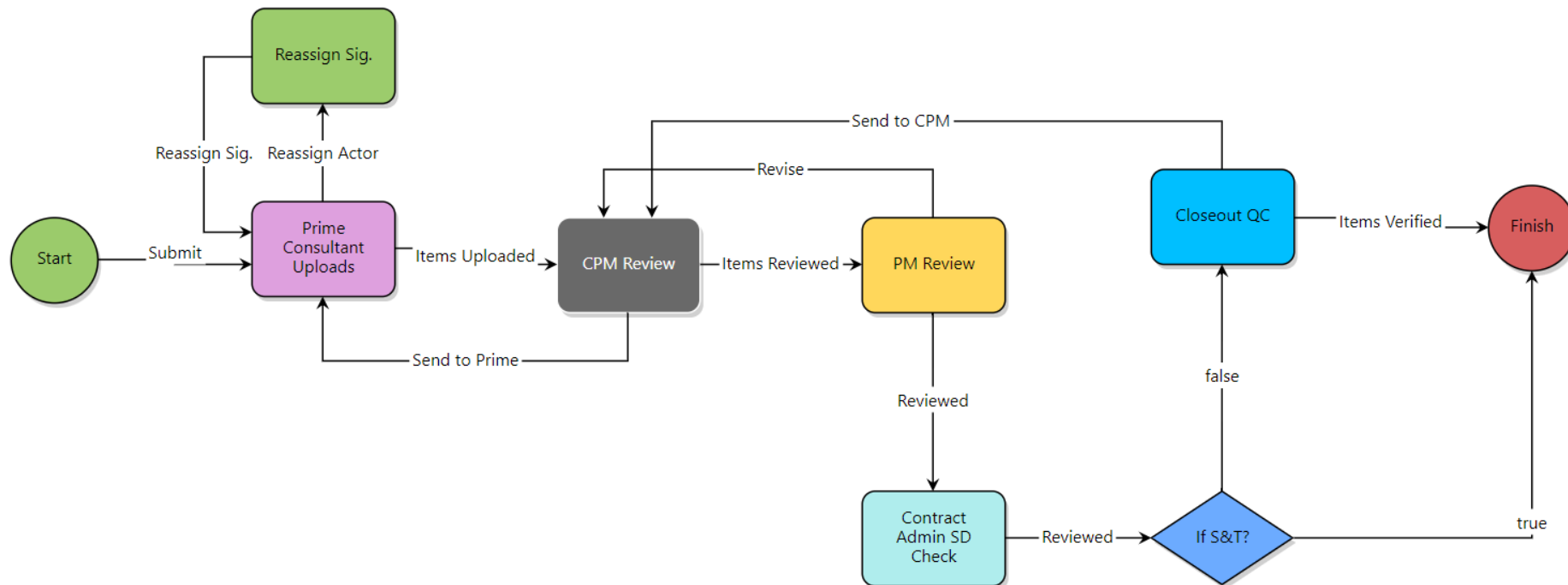
50.20 – Architectural Supplement Instruction

Process Steps		Roles	Page Layout Sections
1	Start/Initiate	Design Staff, Consultant Admin, or Design Consultant	<p>Complete the description field and attach any relevant documentation.</p> <p>Click Submit, which will initiate the process and route to the CPM Review step; or click Save Draft, to save and finish later.</p>
2	CPM Review	CPM	<p>CPM reviews the ASI and can either respond to the initiator with questions for additional clarification or take the action Reviewed to finish the process. In addition, if there was an RFI process that initiated the ASI, attach the RFI process in the process tab of the page layout.</p> <p><u>Take Action</u> “Reviewed” will route to the Finish step, “Revise ASI” to get additional input from the initiator</p>
3	Finish	Automated	<p>Process Status will update to “Finish” and the Process State will be updated to “Complete.”</p>

PRJCN – Project Closeout - Consultant

Description: This is a child process of the Project Closeout process for the consultant.

Actors: Consultants, PM, CPM, and Contract Admin

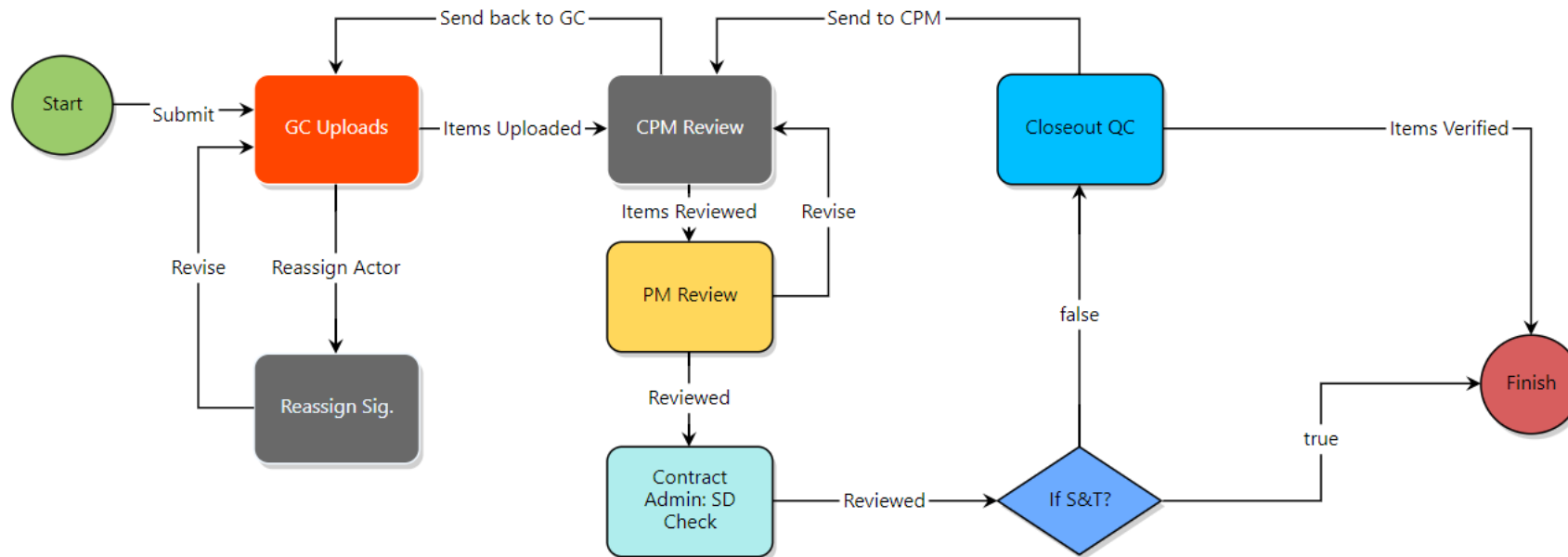


Process Steps		Roles	Page Layout Sections
1	Start/Initiate	Construction Director, CPM, Director, PM and Contract Admin	Complete the required fields in the following sections of the start page layout: 1. Commitment Details 2. Commitment Others 3. Commitment Custom Fields 4. Commitment Items Once completed, click “Submit” or “Save Draft” to complete later.
2	Amount Null?	Conditional	If the amount is null, the process will be returned to the Initiator step with an error message to correct.
3	Construction Services Manager	Construction Director	Review attached proposal and compare it to the information entered in the process page layout. <u>Take Action:</u> “Reviewed” to send to the next step in the workflow or “Revise Request” to send it back to the Initiator.
4	Accounting/BSS Review	Accounting/BSS	Verify the appropriate MoCode has been applied. <u>Take Action:</u> “Reviewed” to send to the next step in the workflow or “Revise” to send it back to the Initiator to revise.
5	Director	Conditional	“Yes” route to CPM Review Construction (Allowance) “No” route to CPM Review (Const.) Allows the CPM to include the GC in the workflow.
6	Contract Signing Limits	Conditional	“Yes” route to MM with CL “No” route to MM with No CL
7	Mail Merge with CL (System)	Automated	Performs mail merge of process data with DBB contract template and routes to Mail Merge for Bonds System.
8	Mail Merge for Bonds System	Automated	This step will merge process data with the Change Order template and create the Change Order and attach it to the process for the next review step.
9	Campus Contracting Officer and System Review	Contracting Officer Campus/System	Review attached proposal and compare it to the information entered in the process page layout. <u>Take Action:</u> “Reviewed” to send to the next step in the workflow or “Revise Request” to send it back to the Initiator.

PRJCI – Project Closeout - Contractor

Description: This is a child process of the Project Closeout process for the contractor.

Actors: Consultants, PM, CPM, and Contract Admin

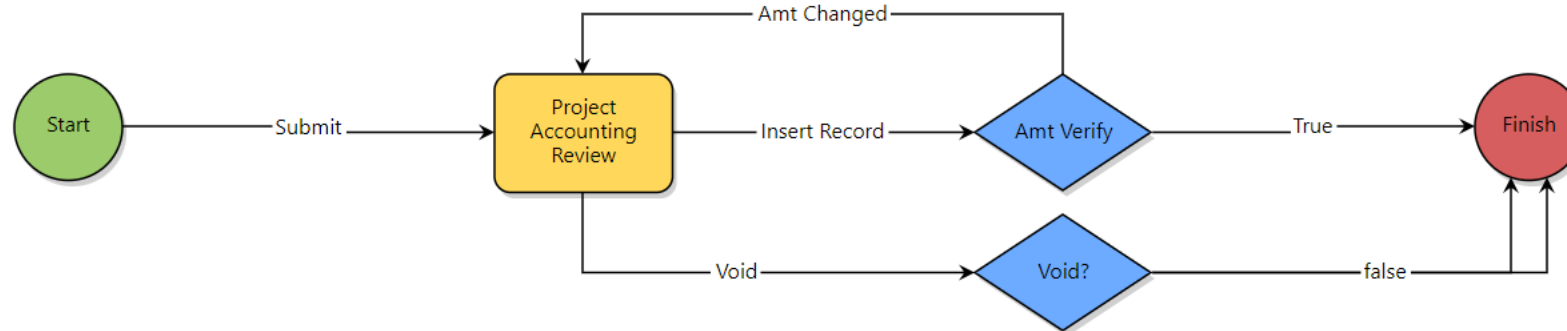


Process Steps		Roles	Page Layout Sections
1	Start	Spawned	This process is initiated/spawned from the 60.10 – Project Closeout process
2	GC Uploads	General Contractor	Review attached proposed Change Order. <u>Take Action:</u> “Reviewed” to send to the next step in the workflow or “Revise” to send it back to the Initiator, or “Send to Contractor.”
3	CPM Review	CPM	“Yes” System Review (Const.) step. “No” route to CO Approver (Const.) step.
4	PM Review	FPD Contract Admin	Review contractor’s signed contract. <u>Take Action:</u> “Reviewed” to send to the next step.
5	Contract Admin: SD Check		Execute Contract. <u>Take Action:</u> “DocuSign” to execute contract and route to next step.
6	If S&T?	Conditional	Execute Contract. <u>Take Action:</u> “DocuSign” to execute contract and route to next step.
7	Finish	Automated	Completed.

CEI – Cost Process Exceptions Import

Description: This is a child process of the Project Closeout process for the contractor.

Actors: Consultants, PM, CPM, and Contract Admin



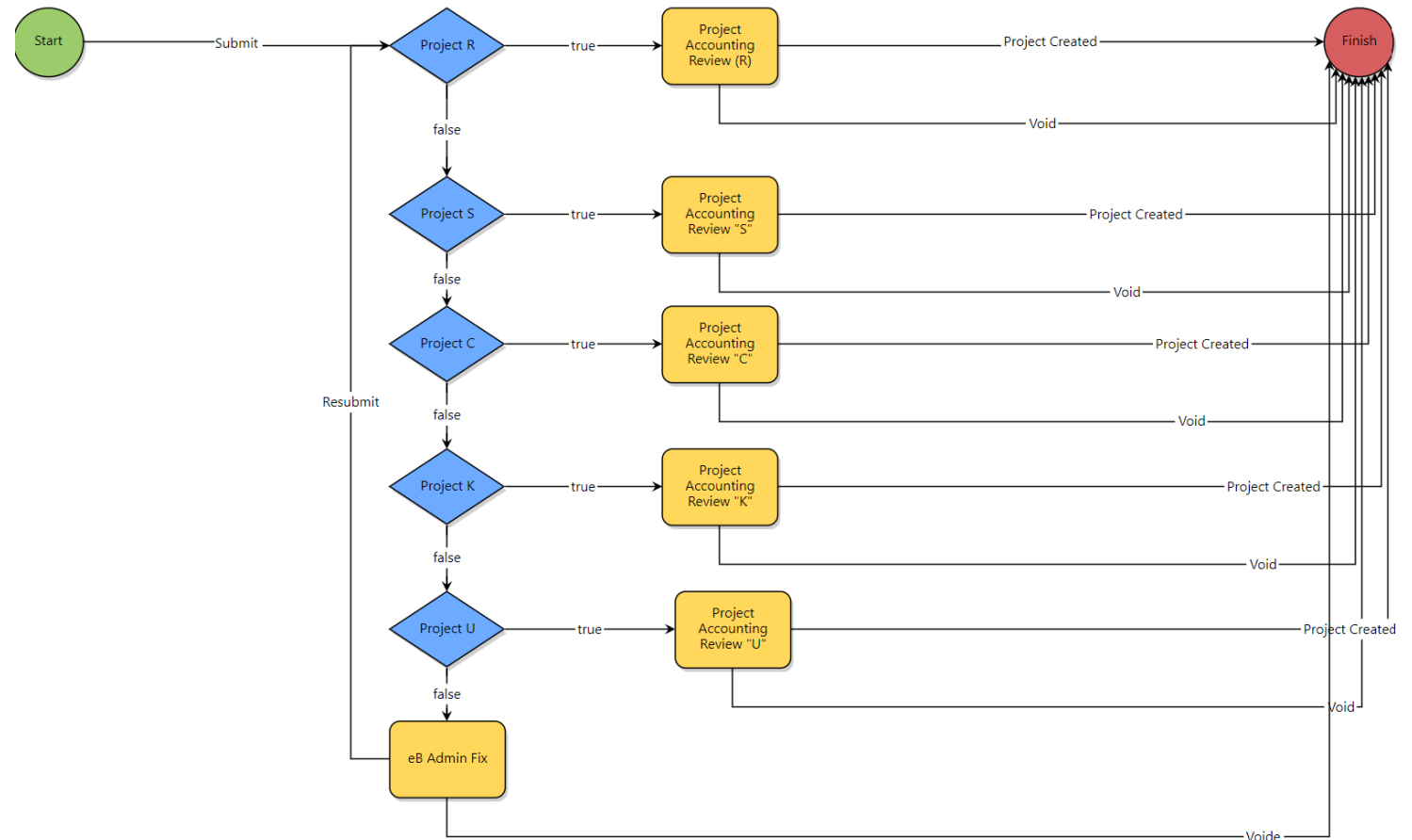
80.00 - Admin – Cost Process Exceptions Import

Process Steps		Roles	Page Layout Sections
1	Start	Spawned	This process is initiated/spawned from the 60.10 – Project Closeout process
2	GC Uploads	General Contractor	Review attached proposed Change Order. <u>Take Action:</u> “Reviewed” to send to the next step in the workflow or “Revise” to send it back to the Initiator, or “Send to Contractor.”
3	CPM Review	CPM	“Yes” System Review (Const.) step. “No” route to CO Approver (Const.) step.
4	PM Review	FPD Contract Admin	Review contractor’s signed contract. <u>Take Action:</u> “Reviewed” to send to the next step.
5	Contract Admin: SD Check		Execute Contract. <u>Take Action:</u> “DocuSign” to execute contract and route to next step.
6	If S&T?	Conditional	Execute Contract. <u>Take Action:</u> “DocuSign” to execute contract and route to next step.
7	Finish	Automated	Completed.

N-CEI – Cost Process Exceptions Import

Description: This is an admin project to determine if the expense incurred requires a project to be added to eBuilder.

Actors: eBuilder Admin



Process Steps		Roles	Page Layout Sections
1	Start	Spawned	This process is initiated/spawned from the 60.10 – Project Closeout process
2	GC Uploads	General Contractor	Review attached proposed Change Order. <u>Take Action:</u> “Reviewed” to send to the next step in the workflow or “Revise” to send it back to the Initiator, or “Send to Contractor.”
3	CPM Review	CPM	“Yes” System Review (Const.) step. “No” route to CO Approver (Const.) step.
4	PM Review	FPD Contract Admin	Review contractor’s signed contract. <u>Take Action:</u> “Reviewed” to send to the next step.
5	Contract Admin: SD Check		Execute Contract. <u>Take Action:</u> “DocuSign” to execute contract and route to next step.
6	If S&T?	Conditional	Execute Contract. <u>Take Action:</u> “DocuSign” to execute contract and route to next step.
7	Finish	Automated	Completed.

Questions?

