eBuilder User Guide

01.10 – Project Status and Details Update
(PJTUP)

| Revision History			
Rev #	**Reason**	**Date**	**Revised By**
0	Initial Release	7/1/2024	Bill Copeland

University of Missouri System

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Process Overview |

The Project Status and Details Update process is used to update the project details and status page of a project. This process maintains the history of the value of original data field and new data field, who made the change(s), and the date and time of the change. eBuilder maintains this information in each process instance within the project, which allows reporting on how the Project Details and Status Update of a project evolves over time. Depending on your campus PDC guidance, this is a process you may run with regular frequency to update your projects (weekly, bi-monthly, monthly, etc.) There are several processes and reports that will utilize information from the Project Details Page, so it's important to keep current.

Most roles can start and submit this process, however, if a role other than a Project Manager (PM) or Construction Project Manager (CPM) initiates the process, it will be required to be approved by the PM or CPM based on project status. The PM or CPM will have the ability to update the data fields in their review steps when this process is initiated by a different role.

If the PM or CMP initiates this process, after their updates are applied, they will take the action "Completed" and the process will update the project details and finish. *Note: The **Verify** and **Import Process?** conditional steps below are used by eBuilder Admins to import data when needed.*

Initiation/Start Step |
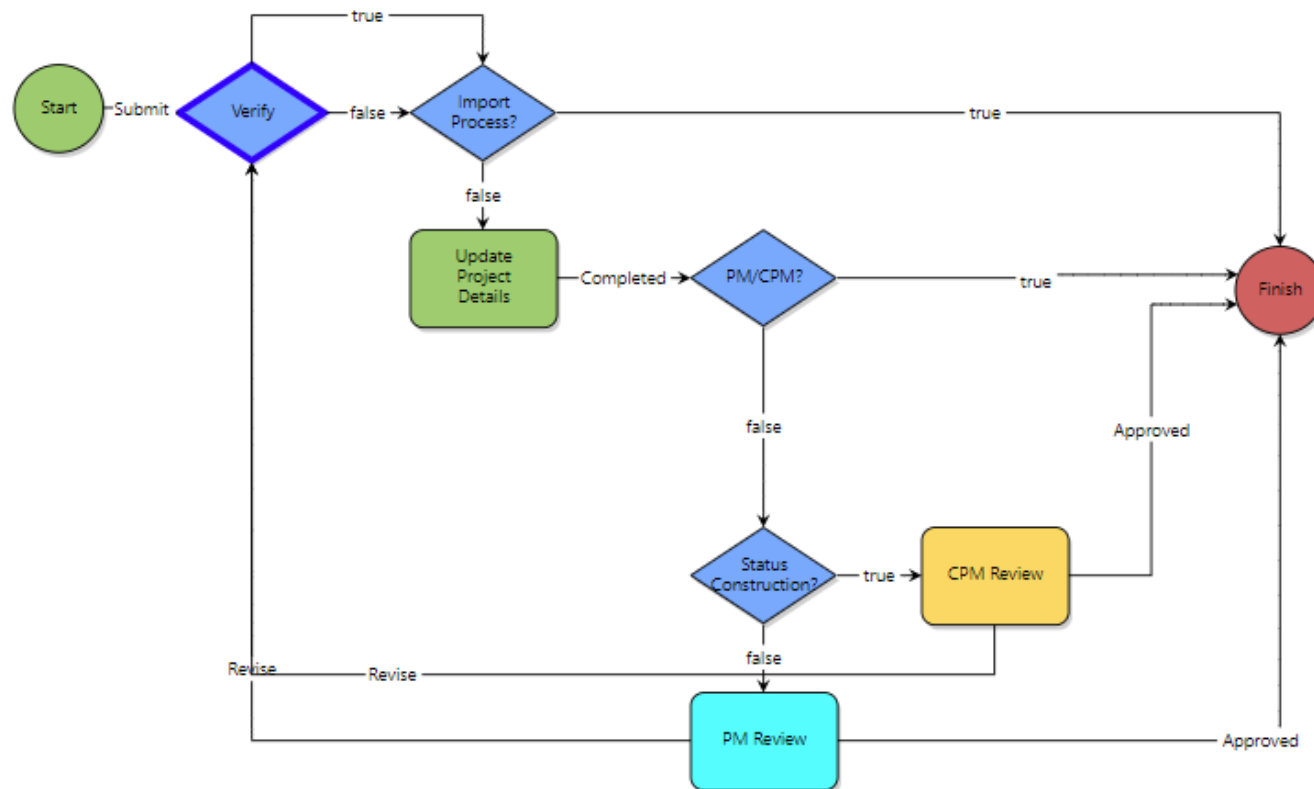
Navigate to the Process Module of the project, select **01.10 – Project Status and Details Update (PJTUP)** process and click **Start**. Depending on your role you will be presented with either of the two start screens:

PM or CPM Roles

01.10 - Project Status And Details Update (PJTUP)   Instructions

Start Process   Print   Check Spelling   Submit   Save Draft   Cancel

Project:	Project to Test MU PDC Processes
Project Number:	COLU1266
Process:	01.10 - Project Status and Details Update

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

Expand All | Collapse All

* PM/CPM Initiate:	● Yes ○ No
* Does the Project Status and Details Need to be Updated?:	Yes ⌄

Print   Check Spelling   **Submit**   Save Draft   Cancel

All Other Roles

01.10 - Project Status And Details Update (PJTUP)   Instructions

Start Process   Print   Check Spelling   Submit   Save Draft   Cancel

Project:	MU PDC Transition to eBuilder
Project Number:	001MUPDC
Process:	01.10 - Project Status and Details Update

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

Expand All | Collapse All

* Does the Project Status and Details Need to be Updated?:	Yes ⌄

Print   Check Spelling   **Submit**   Save Draft   Cancel

With either start screen, click "Submit." This will start the process and pull all project detail information from your project and populate the next screen in the process to update. Once submitted, you will need to go back to the Process Module and open the process you just created.

Update Project Details |
Update or add any necessary project information in the following sections:

Project Details

Current Project Name:	MU PDC Transition to eBuilder
Current Description:	Please limit the description to 256 characters.
	Project will be used to track documentation and tasks related to the transition of MU PDC to eBuilde
Current Project Status:	Design
Current Address:	130 General Services Building
Current City:	Columbia
Current State:	MO
Current Zip / Postal Code:	65211
Current Country:	USA
Current Start Date:	09.01.2023
Current Target Date:	06.28.2024
Current Project Webcam URL:	

Project Information

Current Project Number:	001MUPDC
Current Scope of Work:	Gather requirements MU PDC Planning / Design and Construction Management processes, configure eBuilder, test, provide training and transition MU PDC to eBuilder.
Current Project Justification:	
Current Phase:	Design
Current Project Status Update:	Brief Description of Project Status.
	Still in Design
Current Project Delivery Method:	Other
Current Project Classification:	Renovation/Infrastructure
Current Classification Sub-Type:	No Claim
Current Division:	
Current Department:	
Current Location/Building:	Please select...
Current Suite Number / Room Number:	
Current Campus:	UM SYSTEM
Current Campus City:	Please select...
Current Full Name of Campus:	University of Missouri System
Current Building Permit required?:	No
Current Square Footage:	
NPR Requester Name:	
NPR Requester e-Mail Address:	MU_PDC_Transition_to_eBuilder.99.01_Emails@docs.e-builder.net

Contact Information

Current Project Manager:	Bill Copeland
Current Secondary Project Manager:	
Current Project Administrator:	Please select...
Current Construction Project Manager:	Please select...
Current Secondary Construction Project Manager:	
Current Project Accountant:	Please select...
Current Primary Client Contact:	Bob T
Current Primary Client Contact Email Address:	bobt@lsfsl.com
Current Consultant Firm Name:	[Lookup]
Current Construction Firm Name-:	[Lookup]
Current Client Department Leader Name:	
Current Client Department Leader Email Address:	
Current Client Fiscal Officer Name:	
Current Client Fiscal Officer Email Address:	

Accounting Information

Current Project Dollar Classification:	N/A
Current Prevailing Wage Required?:	No
Current Client Mo Code(s):	
Current Project Mo Code(s):	
Current Insurance Claim Number:	
Current Project Administration Fee Percentage:	0
Current Funding Notes:	
Current Funding Notes 2:	

Board Information

Current Board Capital PLan:	
Current Board A/E Hire Approval:	
Current Board Project Approval:	
Current Board Info Item:	
Current Design Start:	
Current Bid Opening:	
Current Construction Start:	
Current Construction End Date:	
Current Occupancy:	
Current Project Other Names:	

Completed [Take Action] [Check Spelling] [Print] [Copy] [Delegate] [Save] [Cancel]

After applying your edits Take Action **"Completed"** to send to the next step, or you can click on **Save** to finish later, or **Cancel** to end the process. If you Take Action **"Completed"** and you are in either the PM or CPM role, the process will update the Project Detail Page and finish. Remember, if you are in any other role than the PM or CPM the process will route to the appropriate PM or CPM for review/updates and approval.

In the PM / CPM Review steps, they will be presented with same sections/screen above for their review. They will have the option to make edits to the submitted information or send it back to the initiator for Revision.

Finish|

Upon <u>Take Action</u> **"Completed"** the process will update the Project Details Page and change the Status of the process to Closed.

<mark>**Note:** Each time a process is executed, the Process Module will enumerate each instance in the project.</mark>

Process Module / Process Landing Page

Project Processes CP232931 - University Hall Renovate 225 - Crocker, Jessica ▼

C 🔍 Filter by...

Instan... ↑	State ↑↓	Date Created ↑↓	Subject ↑↓	Date Due ↑↓	Step ↑↓	Status ↑↓
PJTUP - 1	Closed	Jul 7, 2023	New Project Request: MU 07/06/2023 CP232921 University Hall Renovate 225Requested by: Beth Asbury		Finish	Finished
PJTUP - 2	Closed	Jul 13, 2023	Update Project Number		Finish	Finished
PJTUP - 3	Closed	Oct 31, 2023	10/31/2023		Finish	Finished