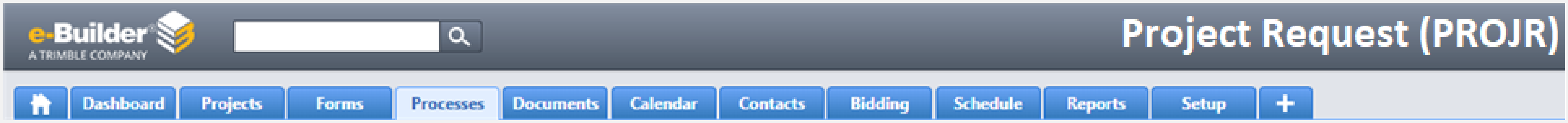
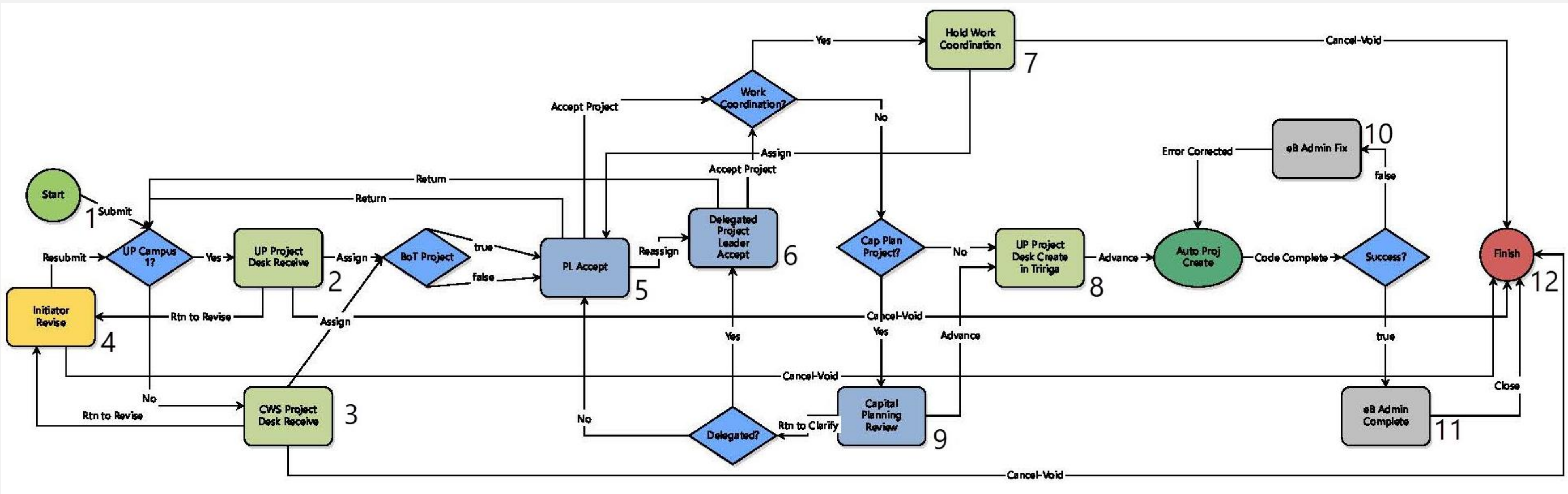
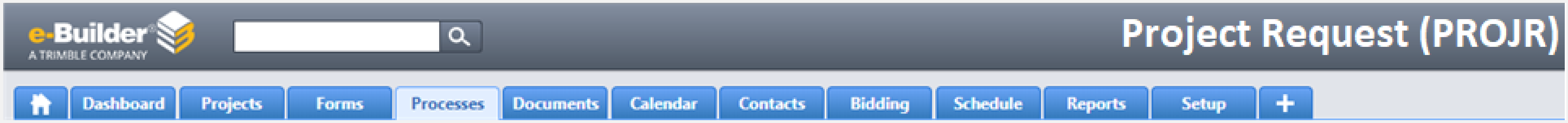

e-Builder
A TRIMBLE COMPANY
Project Request (PROJR)
Dashboard
Projects
Forms
Processes
Documents
Calendar
Contacts
Bidding
Schedule
Reports
Setup
+


Start
Submit
1
UP Campus 1?
Resubmit
Yes
UP Project Desk Receive
2
Assign
BoT Project
true
false
PL Accept
5
Reassign
Delegated Project Leader Accept
6
Return
Return
Accept Project
Work Coordination?
Yes
Hold Work Coordination
7
Cancel-Void
No
Assign
Accept Project
Cap Plan Project?
No
UP Project Desk Create in Tririga
8
Advance
Auto Proj Create
Code Complete
Success?
false
eB Admin Fix
10
Error Corrected
true
eB Admin Complete
11
Close
Finish
12
Initiator Revise
4
Rtn to Revise
Assign
Cancel-Void
Yes
Yes
Advance
Cancel-Void
No
Rtn to Revise
CWS Project Desk Receive
3
No
Delegated?
Rtn to Clarify
Capital Planning Review
9
Cancel-Void



Overview

The Project Request (PROJR) process is used to formally request the creation of a project in e-Builder. If you need work that will cost under $3,000, please submit a workorder through Maximo.

During this process, it will also be determined if the project that is being requested for creation already exists in e-Builder through the capital planning module. If the project does exist, it will be manually activated, and the data captured in this process will be transferred to the existing project prior to it being made available to applicable e-Builder users.

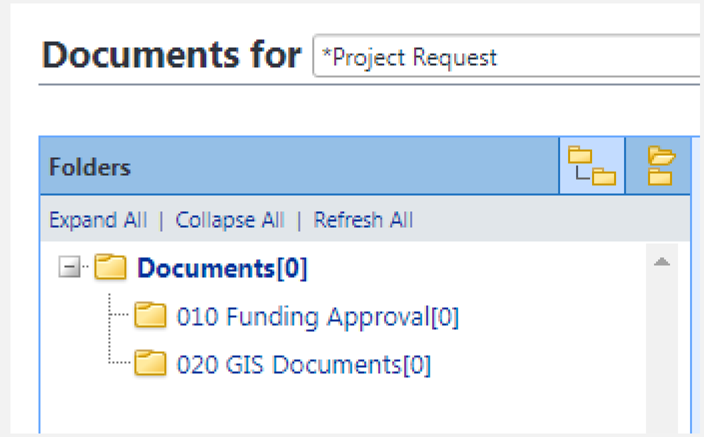
Document Folders

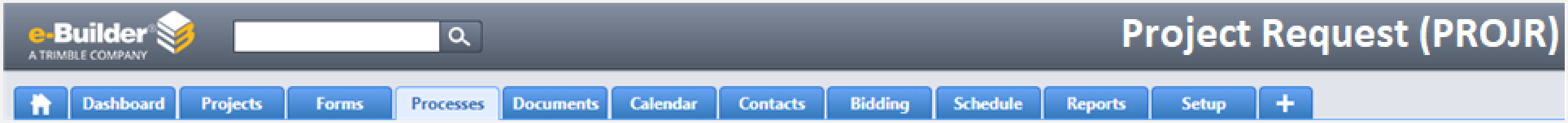
Two specific documents may attached to this process.

1. CAF Form - If you are submitting funding with this project request, you will be required to download the CAF Form obtain all required signatures and upload it in the applicable field in this process.
2. GIS Map - If your location is "Unknown Inventory-999999", you are required to upload a GIS Map of the location in the provided field in the process.

Process participants may attach other documents using the Attached Documents tab in the process. When attaching any documents, the permissions applied in the Documents module determine the document's accessibility from the process.

The following folder structure has been identified as the standard folder structure for a new project in e-Builder.

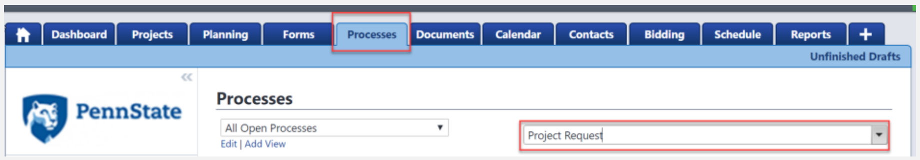




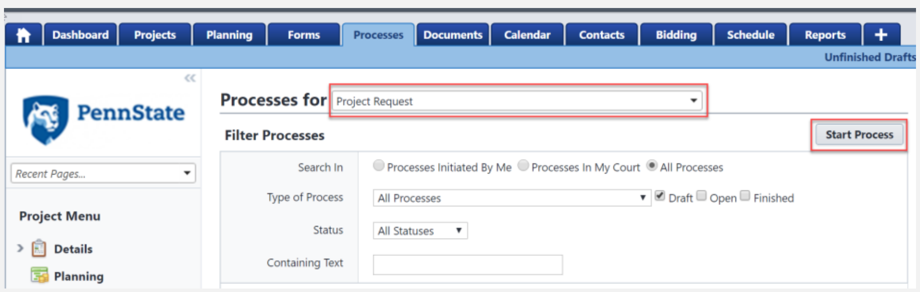
Process Steps

1. **Start** – Any User at PSU initiates the process, fills out form fields, attaches any documents necessary to support the Project Request and submits the process.

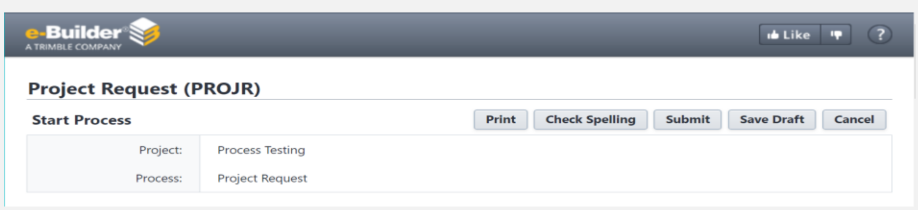
- Set the Project from the Process tab. Click the Process tab and select the "*Project Request" project from the drop-down box.



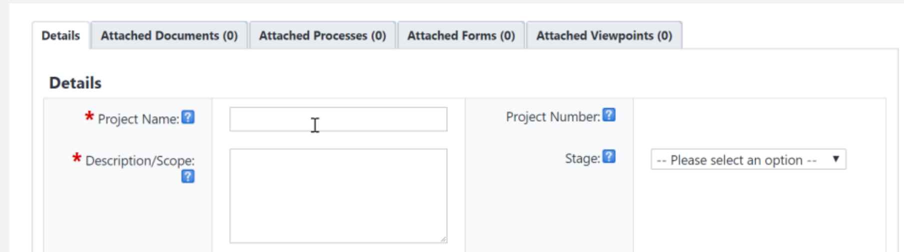
- In the Process View of the Project Creation Project, the PSU user clicks the **Start Process** button.



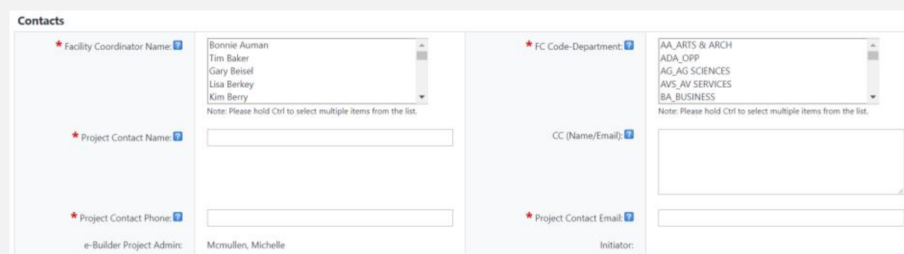
- The Project Request Process (PROJR) will open, it is broken out into various sections, fill out as many fields as you have information for in each section. Required fields are designated with an *.

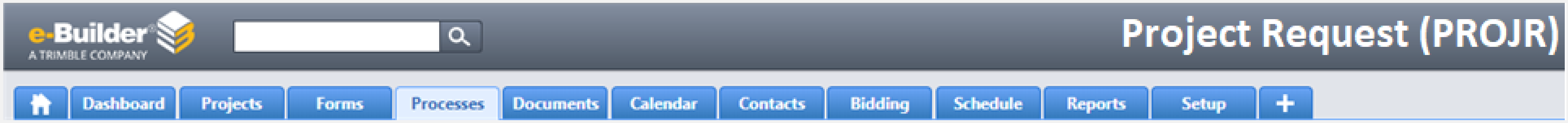


- In the Details Section, add the Project Name (can be prefaced with the 2-digit campus code), add a description of the project. Assign the current stage of the project. Note: The Project Number will be assigned later in the process.

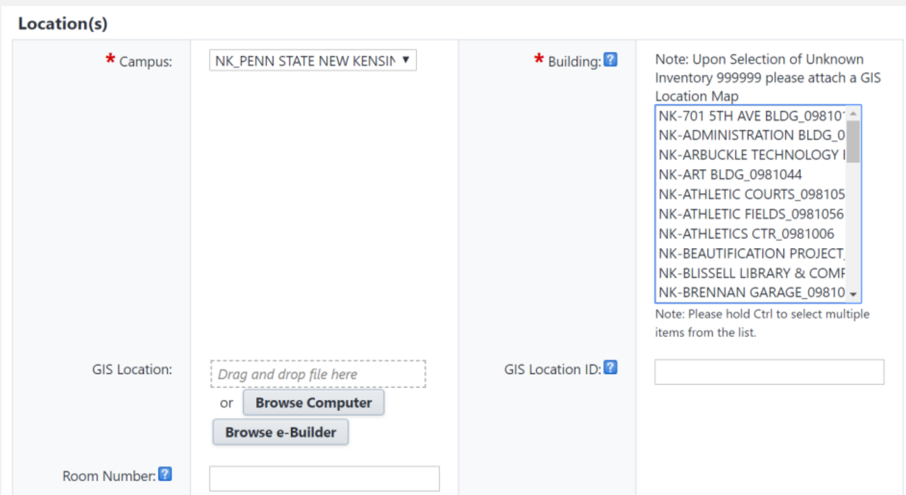


- In the Contacts Section, select the Facility Coordinator or DBS on the project. Select the FC Code/Department the project is in. Add any names/email of people who you wish to be notified this project has started. Add a Project Contact, Phone and Email (this would typically be the person on-site who the Project Leader will be in contact with). Note: The Initiator and e-Builder Project Admin will be auto-populated.

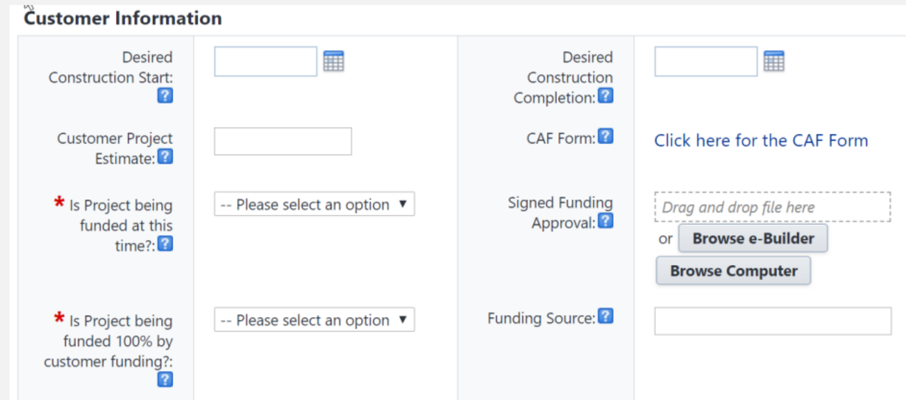




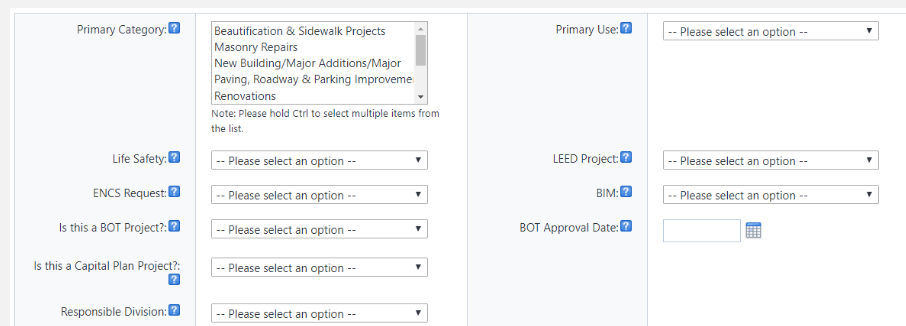
- In the Locations Section, once you select a Campus the Building List will populate with the buildings within that campus (to select multiple buildings, hold the CTRL key as you select buildings). GIS Location is to provide additional location information if you selected UNKNOWN-INVENTORY 999999 (In the GIS Location field, upload a GIS Map and in the GIS Location ID add coordinates of the location). Room number is an open field, so one or multiple rooms can be added.



- In the Customer Information Section, fill out as much information as you have. If you are submitting this Project Request with funding, please fill out the CAF Form by clicking the provided link, select Yes for "Is Project being funded at this time?", upload the signed CAF form in the indicated Signed Funding Approval field, indicate if the project is funded 100% by customer funding and indicate the Funding Source. If there is no funding with the project, simply indicate No for "Is Project being funded at this time?".

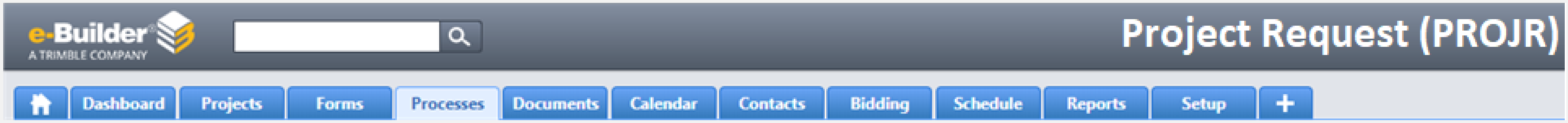


Fill out any additional information you may have in this section. None of this information is required for the initiator; however, once submitted to the Project Leader, several fields will be required to be filled in.



1.1.8 Take the following action:

- **Submit** – The Initiator fills out form fields, attaches documents as necessary, and submits the process. The process is advanced to the Project Desk step. Proceed to step 2.



Field Descriptions

Subject	This field will be auto-populated with the Project Number-Project Name
Details	
Project Name	Short project description
Project Number	PSU Project Number will be populated upon project creation
*Description/Scope	Long project description or scope of work
Stage	Indicate the initial stage of the project.
Contacts	
*Facility Coordinator	Select the facility coordinator(s) for the area where the project is located.
*FC Code-Department	Select the FC Code/Department for the area where the project is located.
Initiator	This field will be auto-populated with the name of the person who initiated the Project Request.
*Project Contact Name	Name of the person who should be contacted about this project
*Project Contact Email	Email of the person who is listed as the Contact
*Project Contact Phone	Project Contact's Direct Phone number (Area Code) XXX-XXXX
CC (Name / Email)	Enter one or multiple people who should receive a notification of the project being added.
e-Builder Project Admin	This field will be auto-populated with the PSU e-Builder Admin
Location(s)	
*Campus	Select the campus where the project is to be performed.
*Building	If building does not exist for University Park, please use UNKNOWN-INVENTORY 999999.
GIS Location	Upload a map of the GIS location of the project
GIS Location ID	Enter the specific GIS location string

Room Number	Enter room number(s) where work is to be performed
Customer Information	
Desired Construction Start	Provide estimated date for the desired start of construction
Desired Construction Completion	Provide estimated date for the desired construction completion
Customer Project Estimate	Customer to provide an estimated cost of the project. Enter a dollar value
CAF Form	Click the link for the CAF Form.
*Is Project Being Funded at this Time	Please indicate if the project is anticipated to be funded 100% by customer funding
Signed Funding Approval	Upload signed funding approval if you selected that project is being funded.
*Is Project Being Funded 100% by Customer Funding?	Please indicate if the project is anticipated to be funded 100% by customer funding
Funding Source	If funding is being provided indicate the source of the funding.
Primary Category	Select one or more categories of the type of project
Primary Use	What is the primary use of the space where the project is being performed?
Life Safety	Does this project involve life safety?
LEED Project	Is this a LEED Project?
ENCS Request	Does this project include Enterprise Network & Communication Services (ENCS)?
BIM	Does this project contain BIM?
Is this a BOT Project?	Does this project need to go to the Board of Trustees for approval?
BOT Approval Date	Date the BOT approved
Is this a Capital Plan Project?	Is this project on the capital plan or part of a capital plan program?
Responsible Division	The division within OPP that is responsible for the project.

2. **UP Project Desk Receive –** If the Initiator selects University Park (UP) campus, the UP Project Desk role receives the request and can take the following actions:

2.1 Enter and/or Update information in the form fields, as necessary. Fields requiring the UP Project Desk attention are:

Details	
*Project Name	Short project description
*Description/Scope	Long project description or scope of work
Contacts	
*Facility Coordinator	Select the facility coordinator(s) for the area where the project is located.
*FC Code-Department	Select the FC Code/Department for the area where the project is located.
Location(s)	
*Campus	Select the campus where the project is to be performed.
*Building	If building does not exist for University Park, please use UNKNOWN-INVENTORY 999999.
*Primary Category	Select one or more categories of the type of project
*Responsible Division	The division within OPP that is responsible for the project.
Major Maintenance	
Major Maintenance Identifier	Identifies whether the project contains Major Maintenance funding from either UP or CWS.
Major Maintenance Code	Identifies the area the Major Maintenance work is being performed on this project.

2.2 Take one of the following actions:

- **Cancel-Void** – If the request is no longer applicable, the Project Desk voids the request and closes the process. After taking the action, enter a required comment explaining the reason for voiding the process. The process is advanced to the Finish step. Proceed to step 12.
- **Return to Revise** – If the request requires clarification or correction, the Project Desk sends the process back to the Initiator. After taking the action, enter a required comment explaining the changes made and/or the reason for returning the process. The process is returned to the Initiator to the Initiator Revise step. Proceed to step 4
- **Assign** – The Project Desk selects a Project Leader to assign the project to. The process is advanced to the PL Accept step. Proceed to step 5

3. **CWS Project Desk Receive –** If the Initiator selects any campus other than University Park (UP) campus, the Commonwealth Services Project Desk role receives the request and can take the following actions:

3.1 Enter and Update information in the form fields, as necessary.

Details	
*Project Name	Short project description
*Description/Scope	Long project description or scope of work
Contacts	
*Facility Coordinator	Select the facility coordinator(s) for the area where the project is located.
*FC Code-Department	Select the FC Code/Department for the area where the project is located.
Location(s)	
*Campus	Select the campus where the project is to be performed.
*Building	If building does not exist for University Park, please use UNKNOWN-INVENTORY 999999.
*Primary Category	Select one or more categories of the type of project
*Responsible Division	The division within OPP that is responsible for the project.
Major Maintenance	
Major Maintenance Identifier	Identifies whether the project contains Major Maintenance funding from either UP or CWS.
Major Maintenance Code	Identifies the area the Major Maintenance work is being performed on this project.

3.2 Take one of the following actions:

- **Cancel-Void** – If the request is no longer applicable, the CWS Project Desk voids the request and closes the process. After taking the action, enter a required comment explaining the reason for voiding the process. The process is advanced to the Finish step. Proceed to step 12.
- **Rtn to Revise** – If the request requires clarification or correction, the CWS Project Desk sends the process back to the Initiator. After taking the action, enter a required comment explaining the changes made and/or the reason for returning the process. The process is returned to the Initiator to the Initiator Revise step. Proceed to step 4
- **Assign** – The CWS Project Desk selects a Project Leader to assign the project to. The process is advanced to the PL Accept step with a status of Submitted. Proceed to step 5

4. Initiator Revise – The Process Initiator role receives the process from the Project Desk and may return the process to the Project Desk with corrections made or can cancel the request.

4.1 Update the information in the form fields and/or attach corrected documentation for the project request

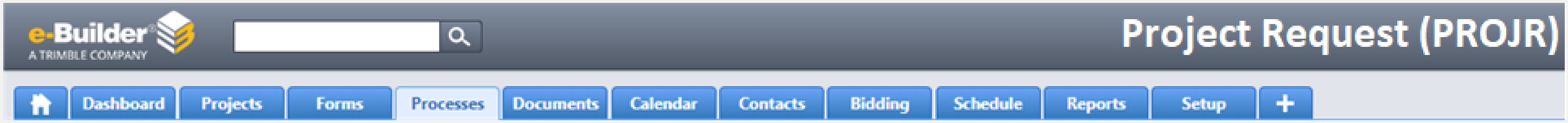
4.2 Take one of the following actions:

- **Cancel-Void** – If the request is no longer applicable, the Initiator voids the request and closes the process. After taking the action, enter a required comment explaining the reason for voiding the process. The process is advanced to the Finish step with a status of *Void*. Proceed to step 12.
- **Resubmit**– If the request requires clarification or correction, the Initiator sends the process back to the Project Desk. After taking the action, the user can enter a comment explaining the changes made and/or the reason for resubmitting the process. The process is returned to the Project Desk. Proceed to step 2 for UP Campus or Step 3 for CWS Campus's

5. PL Accept – The Project Leader receives the process instance from the Project Desk and after reviewing the information for the requested project, can determine if this work should be coordinated with other project requests, or assign the project scope to be completed by another Project Leader. Additionally, the Project Leader can return the process to the Project Desk for corrections, clarifications, or reassignment to another campus. Alternatively, the Project Leader can accept the project and advance the process forward.

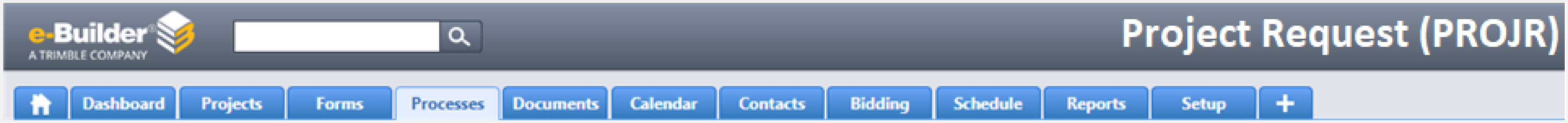
5.1 Enter missing information and/or correct information in the form fields below. If you indicate that Work Coordination is needed the project will NOT be created immediately, it will be put on hold for review by the Work Coordination committee. If reassigning project, skip to 5.2 and take the Reassign action.

Subject	This field will be auto-populated with the Project Number-Project Name
Details	
*Project Name	Short project description
Project Number	PSU Project Number will be populated upon project creation
*Description/Scope	Long project description or scope of work
Stage	Indicate the initial stage of the project.
Contacts	
*Facility Coordinator	Select the facility coordinator(s) for the area where the project is located.
*FC Code-Department	Select the FC Code/Department for the area where the project is located.
CC (Name / Email)	Enter one or multiple people who should receive a notification of the project being added.
*Project Contact Name	Name of the person who should be contacted about this project
*Project Contact Email	Email of the person who is listed as the Contact
*Project Contact Phone	Project Contact's Direct Phone number (Area Code) XXX-XXXX



CM Agency	Will there be a CM Agency assigned to the project? This is needed to determine routing in various workflows.
CSR	Will there be a CSR assigned to the project? This is needed to determine routing in various workflows.
Multiple Prime Contractor	Will is project have multiple Prime Contractors assigned to the project? This is needed to determine routing in various workflows.
Initiator	This field will be auto-populated with the name of the person who initiated the Project Request.
e-Builder Project Admin	This field will be auto-populated with the PSU e-Builder Admin
Location(s)	
*Campus	Select the campus where the project is to be performed.
*Building	If building does not exist for University Park, please use UNKNOWN-INVENTORY 999999.
GIS Location	Upload a map of the GIS location of the project
GIS Location ID	Enter the specific GIS location string
Room Number	Enter room number(s) where work is to be performed
Customer Information	
Desired Construction Start	Provide estimated date for the desired start of construction
Desired Construction Completion	Provide estimated date for the desired construction completion
Customer Project Estimate	Customer to provide an estimated cost of the project. Enter a dollar value
CAF Form	Click the link for the CAF Form.
*Is Project Being Funded at this Time	Please indicate if the project is anticipated to be funded 100% by customer funding
Signed Funding Approval	Upload signed funding approval if you selected that project is being funded.
*Is Project Being Funded 100% by Customer Funding?	Please indicate if the project is anticipated to be funded 100% by customer funding

Funding Source	If funding is being provided indicate the source of the funding.
Primary Category	Select one or more categories of the type of project
Primary Use	What is the primary use of the space where the project is being performed?
Life Safety	Does this project involve life safety?
LEED Project	Is this a LEED Project?
ENCS Request	Does this project include Enterprise Network & Communication Services (ENCS)?
BIM	Does this project contain BIM?
Is this a BOT Project?	Does this project need to go to the Board of Trustees for approval?
BOT Approval Date	Date the BOT approved
Is this a Capital Plan Project?	Is this project on the capital plan or part of a capital plan program?
Pick Existing Capital Plan Project	Listing of the Projects where Ryan Magyar (Capital Plan Role) is on the project
*Responsible Division	The division within OPP that is responsible for the project.
*Project Type	OPP Capital Project - These projects will have an anticipated value of > $250K. OPP Non-Capital Project - These projects will have an anticipated value of < $250K. OPP Service Project - These projects will not have a dollar threshold. They will consist of OPP services being rendered for standard maintenance, custodial, utility, etc. services that are provided and managed by OPP. This should not be used if there are any construction, design or renovation services being provided.
Major Maintenance	
Major Maintenance Identifier	Identifies whether the project contains Major Maintenance funding from either UP or CWS.



Major Maintenance Code	Identifies the area the Major Maintenance work is being performed on this project.
Work Coordination Please fill out this section if this is a work coordination project ONLY. Work Coordination is for identifying and prioritizing details of unfunded backlog on a building, system, or even room level that meet the physical plant maintenance commitment or maintain support of University mission for University Park ONLY (e.g., Identifying efficiency improvements, replacement of equipment near failure, finish upgrades, etc). The Work Coordination indication will provide Physical Plant a means to coordinate HVAC and window replacements, potential utility, campus beautification, sidewalk and road projects for the same location.	
*Work Coordination Needed	This field is defaulted to No, select Needed if this request is only to inform OPP of work at UP that needs coordination and is NOT an actual project. Completed will be assigned once a "Work Coordination" request has been combined to create a project.
Fiscal Year	Enter the fiscal year when you think that the work coordination will take place (e.g., 2019-2020).
Area	Work coordination Section: Select the Campus Area(s) where this coordination project is located
Estimated Project Cost	Enter an estimated cost of the work coordination project.
Project Type for Work Coordination	Enter the type of project(s) for the work coordination
Security Project Type	If selecting Security in Project Type (above) then indicate type of security project.
Work Coordination	Shows the to/from the Hold Work Coordination Step

Template Selection	
Schedule Template	Type of schedule template to apply to the project (regular or BOT template)
Schedule Manager Role	Lists the role of the Schedule Manager
Schedule Manager	This will typically be the Project Leader and will be assigned by the Project Desk.
Schedule Start Date	Date the schedule should start
Project Template	A template will be applied based on who the actors are for that particular project.

5.2 Take one of the following actions:

- **Return** – If the project Request is unclear or needs to be re-assigned to a different campus by the Project Desk Role, The PL can return the process. After taking the action, enter a required comment explaining the reason for returning the process. The process is returned to the Project Desk step. Proceed to step 2 for UP Campus or Step 3 for CWS Campus's
- **Reassign** – The Project Leader can assign the process to another Project Leader (Delegated Project Leader) and will select the DPL for the next step. This action will transfer ball-in-court to the new project leader. Proceed to step 6
- **Accept Project**– The Project Leader accepts the project.
  - In this step, the project leader will indicate if the project is a BOT project. If yes is selected, the BOT schedule template will be applied to the project. If no or left blank the regular milestone schedule template will be applied to the project.
  - The project leader will also determine if this project can be coordinated with other projects so that there can be a single project to house other project requests that are currently being held in the Work Coordination Step. Proceed to step 7.
  - Additionally, the Project Leader can determine if this project request is part of the capital plan. If so, the system will route the process to the Capital Planner to select an existing project in e-Builder. The data that

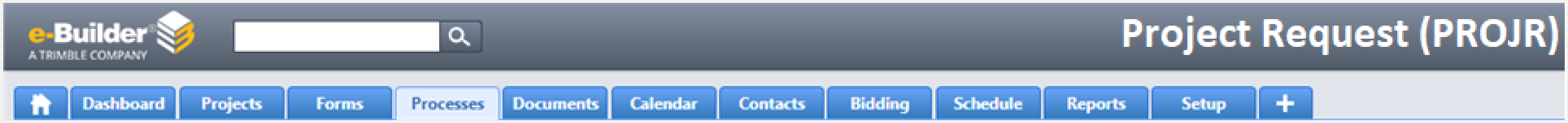
has been captured for this project request will be used to update the existing capital plan project. Proceed to step 8.

- If the project does not qualify for work coordination or is not part of the capital plan, the process advances to the UP Project Desk role to generate the Tririga Job number. Proceed to step 9.

6. **Delegated Project Leader Accept -** A Delegated Project Leader (DPL) receives the process instance from the Project Leader and after reviewing the information for the requested project will determine if this work can be coordinated with other project requests. Alternatively, the DPL can accept the project and advance the process forward, or return the process to the Project Desk for corrections, clarifications, or reassignment

6.1 Enter missing information and/or correct information in the form fields below. If you indicate that Work Coordination is needed the project will NOT be created immediately, it will be put on hold for review by the Work Coordination committee.

Subject	This field will be auto-populated with the Project Number-Project Name
Details	
*Project Name	Short project description
Project Number	PSU Project Number will be populated upon project creation
*Description/Scope	Long project description or scope of work
Stage	Indicate the initial stage of the project.
Contacts	
*Facility Coordinator	Select the facility coordinator(s) for the area where the project is located.
*FC Code-Department	Select the FC Code/Department for the area where the project is located.
CC (Name / Email)	Enter one or multiple people who should receive a notification of the project being added.
*Project Contact Name	Name of the person who should be contacted about this project
*Project Contact Email	Email of the person who is listed as the Contact
*Project Contact Phone	Project Contact's Direct Phone number (Area Code) XXX-XXXX
CM Agency	Will there be a CM Agency assigned to the project? This is needed to determine routing in various workflows.
CSR	Will there be a CSR assigned to the project? This is needed to determine routing in various workflows.
Multiple Prime Contractor	Will is project have multiple Prime Contractors assigned to the project? This is needed to determine routing in various workflows.
Initiator	This field will be auto-populated with the name of the person who initiated the Project Request.
e-Builder Project Admin	This field will be auto-populated with the PSU e-Builder Admin
Location(s)	
*Campus	Select the campus where the project is to be performed.
*Building	If building does not exist for University Park, please use UNKNOWN-INVENTORY 999999.
GIS Location	Upload a map of the GIS location of the project
GIS Location ID	Enter the specific GIS location string
Room Number	Enter room number(s) where work is to be performed
Customer Information	
Desired Construction Start	Provide estimated date for the desired start of construction
Desired Construction Completion	Provide estimated date for the desired construction completion
Customer Project Estimate	Customer to provide an estimated cost of the project. Enter a dollar value
CAF Form	Click the link for the CAF Form.



*Is Project Being Funded at this Time	Please indicate if the project is anticipated to be funded 100% by customer funding
Signed Funding Approval	Upload signed funding approval if you selected that project is being funded.
*Is Project Being Funded 100% by Customer Funding?	Please indicate if the project is anticipated to be funded 100% by customer funding
Funding Source	If funding is being provided indicate the source of the funding.
Primary Category	Select one or more categories of the type of project
Primary Use	What is the primary use of the space where the project is being performed?
Life Safety	Does this project involve life safety?
LEED Project	Is this a LEED Project?
ENCS Request	Does this project include Enterprise Network & Communication Services (ENCS)?
BIM	Does this project contain BIM?
Is this a BOT Project?	Does this project need to go to the Board of Trustees for approval?
BOT Approval Date	Date the BOT approved
Is this a Capital Plan Project?	Is this project on the capital plan or part of a capital plan program?
Pick Existing Capital Plan Project	Listing of the Projects where Ryan Magyar (Capital Plan Role) is on the project
*Responsible Division	The division within OPP that is responsible for the project.
*Project Type	OPP Capital Project - These projects will have an anticipated value of > $250K. OPP Non-Capital Project - These projects will have an anticipated value of < $250K. OPP Service Project - These projects will not have a dollar threshold. They will consist of OPP services being rendered for standard maintenance, custodial, utility, etc. services that are provided and managed by OPP. This should not be used if there are any construction, design or renovation services being provided.
Major Maintenance	
Major Maintenance Identifier	Identifies whether the project contains Major Maintenance funding from either UP or CWS.
Major Maintenance Code	Identifies the area the Major Maintenance work is being performed on this project.
Work Coordination Please fill out this section if this is a work coordination project ONLY. Work Coordination is for identifying and prioritizing details of unfunded backlog on a building, system, or even room level that meet the physical plant maintenance commitment or maintain support of University mission for University Park ONLY (e.g., Identifying efficiency improvements, replacement of equipment near failure, finish upgrades, etc). The Work Coordination indication will provide Physical Plant a means to coordinate HVAC and window replacements, potential utility, campus beautification, sidewalk and road projects for the same location.	
*Work Coordination Needed	This field is defaulted to No, select Needed if this request is only to inform OPP of work at UP that needs coordination and is NOT an actual project. Completed will be assigned once a "Work Coordination" request has been combined to create a project.
Fiscal Year	Enter the fiscal year when you think that the work coordination will take place (e.g., 2019-2020).
Area	Work coordination Section: Select the Campus Area(s) where this coordination project is located
Estimated Project Cost	Enter an estimated cost of the work coordination project.
Project Type for Work Coordination	Enter the type of project(s) for the work coordination

Security Project Type	If selecting Security in Project Type (above) then indicate type of security project.
Work Coordination	Shows the to/from the Hold Work Coordination Step
Template Selection	
Schedule Template	Type of schedule template to apply to the project (regular or BOT template)
Schedule Manager Role	Lists the role of the Schedule Manager
Schedule Manager	This will typically be the Project Leader and will be assigned by the Project Desk.
Schedule Start Date	Date the schedule should start
Project Template	A template will be applied based on who the actors are for that particular project.

6.2 Take one of the following actions:

- **Return** – If the project Request is unclear or needs to be re-assigned to a different campus by the Project Desk Role, The DPL can return the process. After taking the action, enter a required comment explaining the reason for returning the process. The process is returned to the Project Desk step.
- **Accept Project**– The DPL accepts the project.
  - In this step, the DPL will determine if this project can be coordinated with other projects so that there can be a single project to house other project requests that are currently being held in the Work Coordination Step. Proceed to step 7.
  - Additionally, the DPL can determine if this project request is part of the capital plan. If so, the system will route the process to the Capital Planner to select an existing project in e-Builder. The data that has been captured for this project request will be used to update the existing capital plan project. Proceed to step 8.
  - If the project does not qualify for work coordination or is not part of the capital plan, the process advances to the UP Project Desk role to build the project in Tririga. Proceed to step 9.

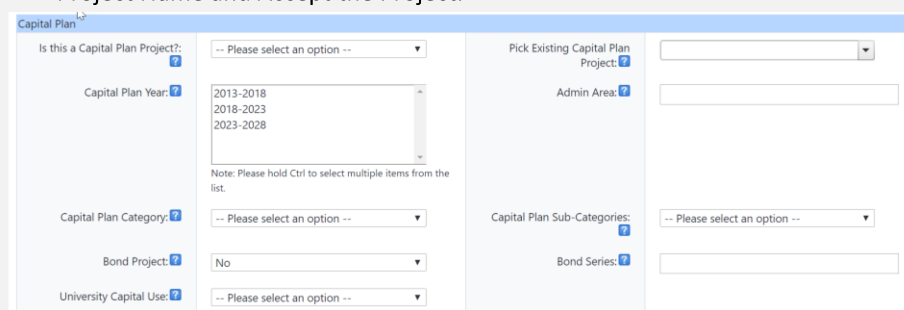
7. **Hold for Work Coordination –** If Work Coordination is selected, the UP Project Desk role receives the request from the PL or DPL and will determine other project requests that are in this step to be combined into a single project and assigned back to the previous PL or DPL.

7.1 Take one of the following actions:

- **Cancel-Void** – If the request is no longer applicable, the Project Desk voids the request and closes the process. After taking the action, enter a required comment explaining the reason for voiding the process. The process is advanced to the Finish step. Proceed to step 12.
- **Assign** – The Project Desk will assign the process instance back to the original PL or DPL and provide additional any comments, attachments and update any necessary data fields
- Proceed to step 6.

8. **Capital Planning Review –** If the request is identified as a capital plan project, the Capital Planning role will receive the request from the PL or DPL and verify that this is either a new capital plan project that is not currently in the system or if it is an existing capital plan project that is already on the plan.

9. If this is a new capital plan project, fill out all fields in the Capital Plan section EXCEPT for "Pick Existing Capital Plan Project" make any adjustments to the Project Name and Accept the Project.



9.1 Enter information in the fields in the Capital Plan Section.

Details	
Pick existing Capital Plan Project	Listing of the Projects where the Capital Plan Role is on the project
Capital Plan Category	Provide the Category the project falls into for the capital plan.
University Capital Use	Select the category of the university capital use
Admin Area	Type in the 3-digit Admin Code
Bond Project	Is this project a bond financed project?
Bond Series	Enter the date and year bond was issued.
Capital Plan Year	The 5-year capital plan period the project falls into.
Capital Plan Sub-Categories	Provide additional categorization of the Capital Plan Projects - This information will be visible in the capital plan Module.

10. If this is a project that is on the Capital Plan (so it is in the Capital Plan Module) then you will need select a project in the “Pick Existing Capital Plan Project” field. This selection will allow all of the fields entered in this Project Request to overwrite the fields in the selected project. So with that said, if you already have the other fields in the Capital Plan Section filled out in the original project then there is no need to fill them out again.

10.1 Take one of the following actions:

- **Rtn to Clarify** – The Capital Planner returns the process to the PL/DPL for clarification on the project request to determine if this is or isn’t a capital plan project. If determined No, then once the process is received back from the PL, Change the “Is this a Capital Plan Project?” to No. Proceed to step 3.1.2

- **Accept Project** – Once the Capital Planner has identified the existing project in e-Builder and updated the process instance with necessary data, the process will be advanced to the “Project Desk Create in Tririga” step.

11. Project Desk Create in Tririga – The UP project desk role receives the project request and proceeds to generate the project number in Tririga.

11.1 Enter information in the form fields.

Template Section	
*Project Number	Enter the Tririga project number
Project Leader	The Project Leader field will be automatically populated based on who accepted the project.
*Schedule Manager	Select the Project Leader assigned to the Project Leader field above as the Schedule Manager.
*Schedule Manager Role	Double check that the role of the schedule manager has been selected
Project Template	Pick the appropriate template based on the Project Leader and who their staff assistant is.

11.2 Take one of the following actions:

- **Advance** – The Project Desk advances the project to the e-Builder code step function. Once the process instance is sent to the code step, e-builder will automatically create a new project in e-Builder or update an existing project from the capital plan. Whether or not a new project is created will depend on whether an actor selects an Existing Capital Plan Project (see table illustration 8.1 above).

In the event the code step fails to create a new project or update an existing project, the process instance is sent to the eB Admin with a list of corrections needed. Proceed to step 10.

Alternatively, if the code step is successful in creating a new project or updating the existing project previously chosen, the process instance will advance to the eB Admin to complete any necessary data fields. Proceed to step 11.

12. **eB Administrator Fix –** – If the automation code step failed to create a new project or update an existing project, the eB Admin role will receive the request from the e-Builder Automation code step and enter necessary data to re-run the process through the code step for success. The list of exceptions can be found in the process instance comment tab

12.1 Take the following action

- **Error Fix** – The eb Admin corrects the data in the process and can select the "Error Corrected" action to re-run the process through the automatic code step

13. **eB Administrator Complete –** If the automation code step succeeds in creating a new project or updating an existing project, the eB Admin role receives the process instance from e-Builder and finalizes and necessary remaining project setup items (e.g., add users to project, add companies to project, populate lookup list values, etc.).

13.1 Take the following action:

- **Close** – The eB Admin submits the process to the finish step. Proceed to finish step.

14. **Finish –** The process is closed. The process information remains available for viewing and reporting.