

# Construction Information Management System e-Builder User Guide



PSFA Training:  
505-468-0293  
[training@nmpsfa.org](mailto:training@nmpsfa.org)

# e-Builder User Guide

## Table of Contents

Getting Started.....	3
Overview.....	3
e-Builder Basics.....	4
Home Tab.....	5
My Setup.....	10
Document Management.....	15
Overview.....	15
Document Functions.....	15
Forms Module.....	20
Overview.....	20
Form Types.....	22
Calendar and Meeting Minutes.....	23
Overview.....	23
Calendar Module.....	23
Meeting Minutes.....	25
Cost Menu.....	28
Overview.....	28
Processes.....	29
Overview.....	29
Commitment Approval.....	31
Commitment Change.....	34
Owner Design Review (ODR).....	37
Request for Approval of School Construction (PSCOC) (RASC PSCOC).....	39
Schedule Of Values (SOV).....	42
Request for Information (RFI).....	45
Architect Supplemental Instructions (ASI).....	47
Additional Design Services Request (ADSR).....	49
Modification Change Request (MCR).....	53
Change Order (CO).....	57
GC Pay Application (PAY APP).....	60
Vendor Invoice (VI).....	63
Substantial Completion (SC).....	67
Document Closeout (DC).....	70
11 Month Correction (11MC).....	72
Ed Spec Review (ESR).....	74
Facility Master Plan (FMP) Review.....	76
Request for Approval of School Construction (Non-PSCOC) (RASC Non-PSCOC).....	78

Reports and Dashboards ..... 81  
    Overview ..... 81  
    Reports Module ..... 81  
    Dashboards Module ..... 83  
  
Acronyms List ..... 85  
    Overview ..... 85

# Getting Started

## Overview

---

### Introduction

PSFA Construction Information Management System (CIMS) is a web based platform that automates and integrates the complex processes involved in managing projects, programs, resources and assets across the lifecycle. This platform integrates the flow of information and communication between project team members, contractors, managers, and others. Project participants can easily collaborate with visibility into the same documents and information resulting in saving time, reducing the potential for error, and accelerating project milestones.

---

## Login

---

### Login Web page

The login webpage for e-Builder is <https://app.e-builder.net/www/index.aspx?ReturnUrl=/index.aspx>

The login page can also be accessed on the e-Builder.net homepage, click “Login to e-Builder”

\*Suggestion: Add this Login page to Internet Explorer Favorites for quick future access.

---

### User Setup

Please contact your PSFA Regional Manager to request access to the e-Builder system.

---

### First Time Login

Users will be required to change their passwords the first time they login. Please note the password policies that have been set will be displayed.

Users will be asked to enter their contact information – note that required field names are displayed with a *red (\*)* asterisk

Do not to enter personal information such as home address or home telephone number – enter business information only.

---

# e-Builder Basics

---

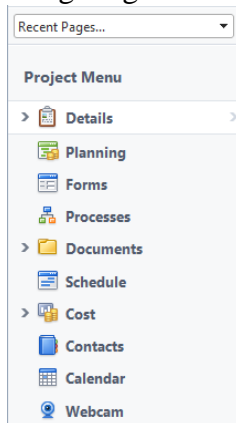
## Structure

e-Builder is structured with a simple layout. All the **“Tabs”** listed across the top of the screen such as Forms, Processes, and Documents are not project specific. To “drill down” to access project specific details within a tab, access the views drop down box at the top of the page for every module.



## Navigation

To access project specific modules, click on the Projects tab, and use the **“Please select a project...”** drop down box to locate your project or simply type in the project number. All project specific modules can be accessed by navigating with the menu located on the left side of the screen.



\*Note: The Project Menu is based on your role and permissions.

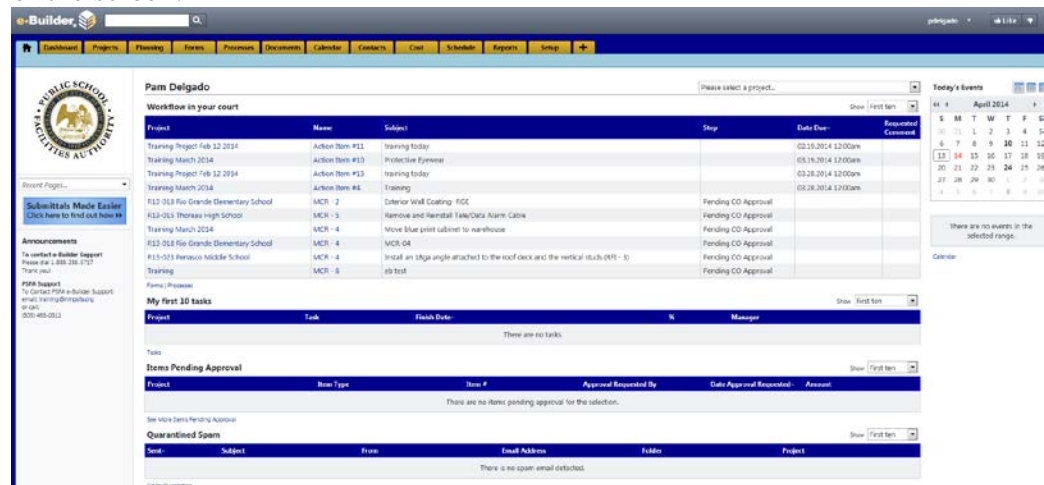
---

# Home Tab

## Overview

The e-Builder Home tab provides one centralized place to see important and upcoming items across all modules in e-Builder. Those items include a summary of upcoming events, workflows in your court, items pending approvals, tasks that you have been assigned to, Quarantined Spam and announcements.

The e-Builder Home module will be the first screen displayed when you log in to the system. You can also access it by clicking on the Home tab at the top of the screen.



## Search

The search feature in e-Builder allows you to search across project information, cost information, documents, forms, contact information, schedule information, processes, and calendar events.



Step	Action
1	In the search field, type in the text you want to search for
2	Click the Search button
3	Check or uncheck the boxes for the different modules you want to search through (i.e. project information, cost information, documents, forms, etc.)
4	Click on the Continue Search button
5	Results will be shown grouped by what module and item they are in
6	Click on the link for the item in the grouping to see your searched item

*Continued on next page*

## Home Tab, Continued

---

**Announcements** On the left side of the screen you will see any announcements that your e-Builder Administrator has created for your account. Announcements are notifications that can be made to inform all users of any important information.

---

**Workflow in Your Court** A list of open work flows that are in your court or that have been assigned to you will be listed in this section in ascending order of the date due.

By default you will see your first ten open work flow items. By clicking on the drop down box next to the word Show, you can change this selection to show your first twenty, or fifty.

To change the sort order of the list click on the header of any of the columns.

To view the open item click on the link in the Name column for the item.

To go to the project of an item click on the link in the Project column.

If your action is to comment only, a check mark will appear in the Request Comment column.



The screenshot shows the e-Builder interface for Pam Delgado. The top navigation bar includes: Dashboard, Projects, Planning, Forms, Processes, Documents, Calendar, Contacts, Cost, Schedule, Reports, Setup, and a plus sign. The main content area is titled "Workflow in your court" and contains a table with the following data:

Project	Name	Subject	Step	Date Due	Requested Comment
Training Project Feb 12 2014	Action Item #11	training today		02-19-2014 12:00am	
Training March 2014	Action Item #10	Protective Eyewear		03-19-2014 12:00am	
Training Project Feb 12 2014	Action Item #13	training today		03-28-2014 12:00am	
Training March 2014	Action Item #4	Training		03-28-2014 12:00am	
R13-018 Rio Grande Elementary School	NCR - 2	Exterior Wall Coating- RDE	Pending CO Approval		

Continued on next page

## Home Tab, Continued

### My First 10 Tasks

This table includes all tasks that require your attention, such as a task that has been assigned to you. If you are a manager who receives notification when tasks reach a certain level of completion, these tasks will display in your court as well.

By default you will see your first ten tasks that have not been completed. By clicking on the drop down box next to the word **Show** you can change this selection to show your first twenty or all tasks with finish dates in the next two weeks or month.

Each task displayed will include the project it is associated with, the finish date, the percent complete, and the manager assigned to it. To change the sort order of the tasks click on the header of any of the columns.

Project	Task	Finish Date	%	Manager
There are no tasks				

### Item Pending Approval

Project	Item Type	Item #	Approval Requested By	Date Approval Requested	Amount
There are no items pending approval for the selection.					

This table includes cost items that are awaiting your approval.

By default you will see your first ten items pending approval. By clicking on the drop down box next to the word **Show** you can change this selection to show your first twenty or first 50.

Each pending item displayed will include the associated project, item type, item number, approval requested by, date approval requested and amount. To change the sort order of the items, click on the header of any of the columns.

---

*Continued on next page*



, Continued

## Calendar

By default you will see events scheduled in the next week. By clicking on the drop down box next to the word **Show**, you can change this selection to show upcoming events for today only, or for the next month.

To view the details of an upcoming event click on the name of the event.

To go to the Calendar click on the calendar link.

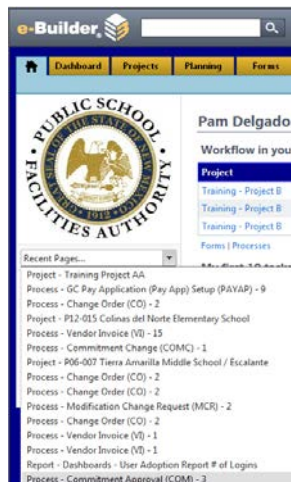
**Friday, May 19, 2017**

There are no events for today.

[Calendar](#)

## Recent Pages

Recent Pages is a quick reference history. Click on a recent page to quickly access a page.



*Continued on next page*

## Quick Start

This menu allows you to easily start any form or process instance. The default menu options contain a combination of the first ten processes/ forms that you have permissions to modify. The ten listed forms/processes will automatically update based on your usage. The most recently created instances will append to the top of the menu list.

First select the desired form or process type from the Quick Start menu. Then from the popup window select the corresponding project and create your instance.

If the form or process you are looking for is not displayed in the defaulted menu list, click the 'More' links. The 'More' link give you access to the remaining instances you have permissions to modify.



# My Setup

---

## Overview

My Setup allows you to reference and customize information about your personal e-Builder account information and settings, including contact information, subscription notifications and personal settings such as your custom views and/or time zone settings.

---

## Access

To access My Setup up, click on the Setup link located in the upper right hand side of your screen. On the My Setup menu located on the upper left hand corner of your screen, choose from the following areas:

Section	Settings
Membership	The membership link allows you to view what roles or projects you are associated with.
Personal Information	This link is where you enter profile information (it is not recommended that you enter personal information), change your password, and request or grant access through the access delegation link.
Preferences	The Preferences link allows users to change the type of e-mail notifications, the time zone and the basic interface settings.
Notification Settings:	In e-Builder, users receive various notifications from Workflow Forms and Calendar Events. Users can enable/disable and create personal summary notifications from this screen.  *Note: This setting is under the Preferences setting.
Interface Settings	The Interface link allows users to change the default settings for items such as folders, subfolders, automatic spell check, single sign-on etc.  *Note: This setting is under the Preferences setting.
Subscriptions:	The subscriptions allow users to set up automatic delivery of report.
Views	The Views link allows users to view what/how information is displayed under each module.

---

## About Summary Notifications

Depending on your role and involvement in a project, you can potentially receive a large quantity of system generated notifications from e-Builder throughout the day. The summary notifications feature gives you the option to combine all of your system notifications and receive one daily summary, thus reducing the volume of emails you receive.

These notifications can be set up at the account level and managed for any number of users or roles. Likewise, individuals can set up notifications for themselves. You are able to choose which modules to include in each notification summary as well as the specific components of the module, such as cost approvals and opened or closed forms, for example.

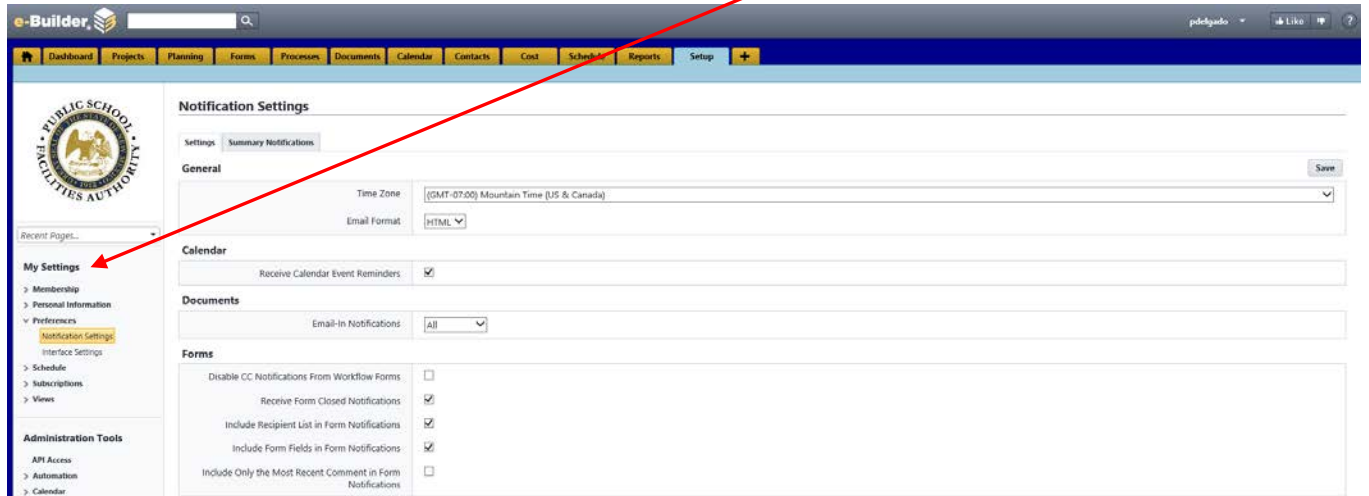
The following instructions are for creating a Personal Notification Summary. If you have any questions or need assistance, please contact training at [training@nmgsfa.org](mailto:training@nmgsfa.org).

# Create Personal Summary Notifications in e-Builder

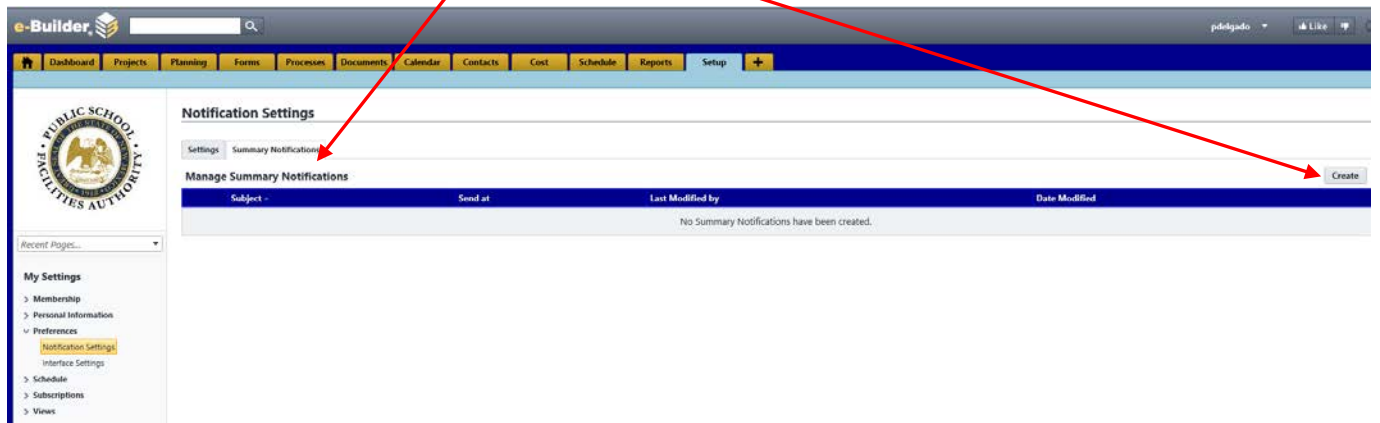
You're able to create summary notifications for yourself, but account administrators are also able to create these notifications on behalf of the members of the organization.

To create personal summary notifications:

1. Go to the Summary Notifications page located in My Settings.

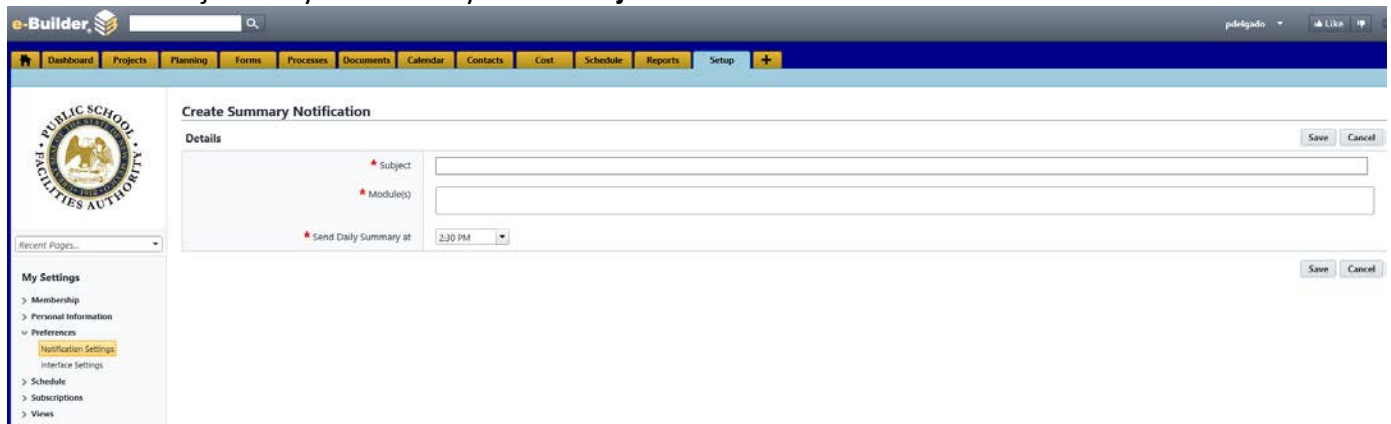


2. Click the **Summary Notifications** tab. Click **Create**.

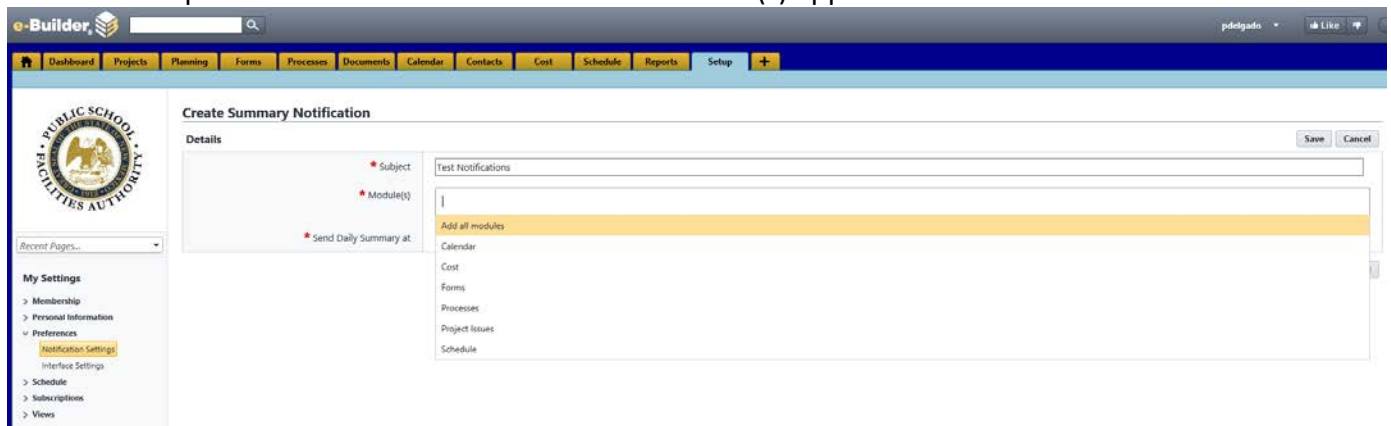


REMEMBER: If there is a red \* the field is required.

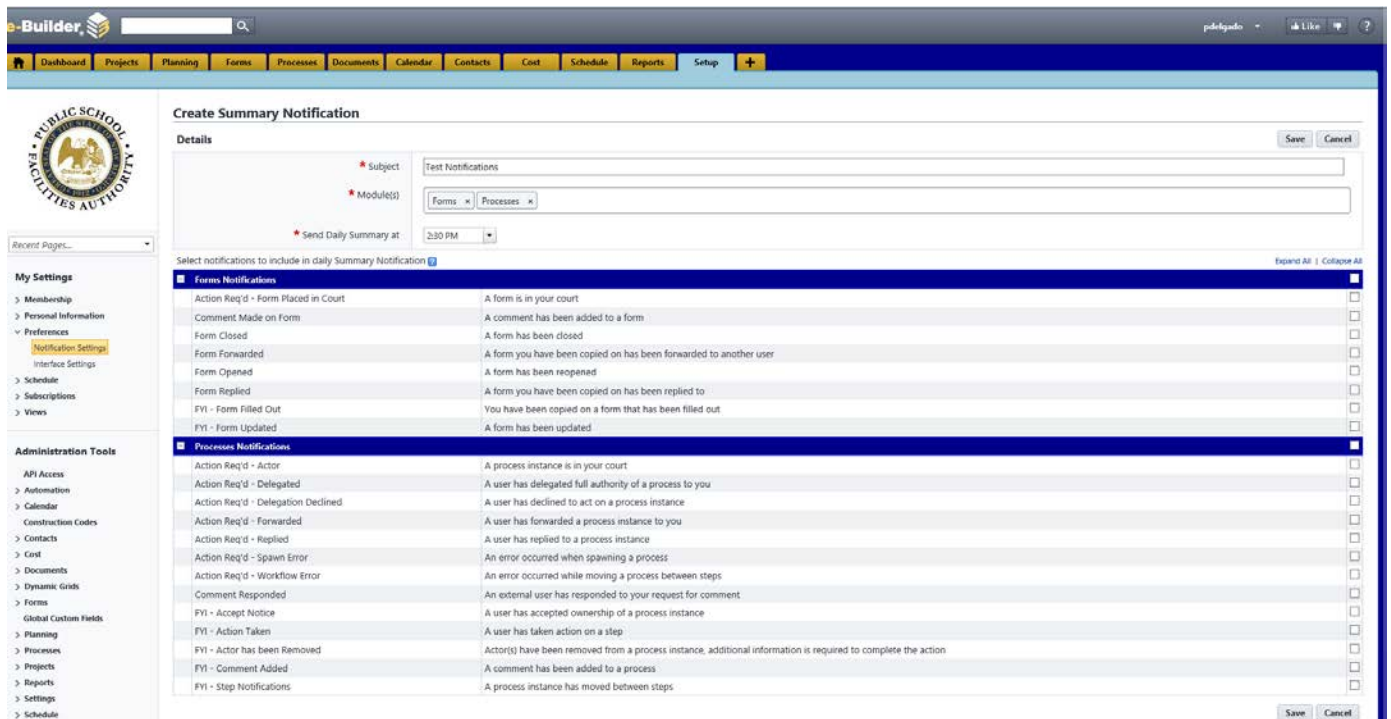
3. Enter a subject for you summary in the **Subject** field



4. Click in the **Module(s)** field to choose the modules from which to summarize notifications. A list of specific notifications for the selected module(s) appears in a table below.



5. Select the check box next to the specific notifications you wish to include in the summary. Click Save



6. On the settings tab, disable all notification preferences under the Forms field. Click **Save**

The screenshot shows the 'Notification Settings' page in the e-Builder application. The page is divided into several sections: 'General', 'Calendar', 'Documents', and 'Forms'. The 'Forms' section contains five checkboxes, all of which are unchecked. A red arrow points to the first checkbox, 'Disable CC Notifications From Workflow Forms'. The 'Save' button is located in the top right corner of the 'General' section.

Section	Setting	Value
General	Time Zone	(GMT-07:00) Mountain Time (US & Canada)
	Email Format	HTML
Calendar	Receive Calendar Event Reminders	<input checked="" type="checkbox"/>
Documents	Email-In Notifications	All
Forms	Disable CC Notifications From Workflow Forms	<input type="checkbox"/>
	Receive Form Closed Notifications	<input type="checkbox"/>
	Include Recipient List in Form Notifications	<input type="checkbox"/>
	Include Form Fields in Form Notifications	<input type="checkbox"/>
	Include Only the Most Recent Comment in Form Notifications	<input type="checkbox"/>

Your Personal Notification Summary can be set up to receive multiple times a day, just follow steps 1-5 and select the time you wish to receive your summary email.

---

# Document Management

## Overview

---

### Introduction

The Documents module is a file repository for all documents related to your projects. It can be compared to an electronic version of a paper filing cabinet or a network drive where documents are stored. The folder structure is created to be standard for every user. One of the key advantages of using the Documents module is that all members of a project can access the most up-to-date files from any location at any time.

You can access it by clicking on the Documents tab at the top of the screen. Access to folders are determined by roles and permissions.

---

## Document Functions

---

### Single File Upload

To upload a single file in the Documents module, follow these steps:

Step	Action
1	Go to the Documents tab.
2	Select the project you want to upload documents to.
3	Click the name of the folder where the document will be stored.
4	Click the upload link.
5	In the Select a File area click Select Files to locate a file on your computer.
6	Choose the file to upload by either clicking the clicking the document name then open or double clicking the file name. The files you selected will now appear on your upload window.
7	Click the Upload Now button.

*Continued on next page*



## Document Functions, Continued

---

### Multiple File Upload

To upload multiple files in the Documents module, follow these steps:

Step	Action
1	Go to the Documents tab.
2	Select the project you want to upload multiple files to.
3	Navigate and click the name of the folder where the documents will be stored.
4	Using your browser, locate the files you wish to upload from your hard drive. Hold the control button and click to select multiple files or choose an entire folder.
5	Once files are selected, drag and drop them to the Upload Documents window.
6	Click the Upload Now button.

---

### Viewing Documents

To view documents, follow these steps:

Step	Action
1	Click on the name of the folder where the document is stored.
2	Click on the name of the file that you want to view.

---

### Redlining Documents

Any document stored in e-Builder can be redlined. Redlining a document means to create a markup layer that lives in e-Builder and does not alter the native file. To redline documents, follow these steps:

Step	Action
1	Click on the name of the folder where the document is stored.
2	Click on the Redline link underneath the file name. A new window opens.
3	Click the Markup Icon and select New.
4	Use the tools on the left-hand side of screen to mark up the file.
5	Click the Markup icon again and select Save As.
6	Enter the name of your markup and click OK.

---

*Continued on next page*

## Document Functions, Continued

---

### Deleting Documents

Documents in e-Builder can be deleted however *no documents are permanently deleted* as they can be recovered by your e-Builder Administrator or Project Administrator. So as a best practice, it is important to consider this aspect when putting any documents or other information into e-Builder. **YOU MAY ONLY DELETE DOCUMENTS THAT YOU HAVE UPLOADED.** To delete documents, follow these steps:

Step	Action
1	Click on the name of the folder where the document is stored.
2	Select the check boxes next to the files to be deleted.
3	Click on the Delete link.
4	Click the OK button. The selection will be deleted.

---

### Downloading Documents

To download documents, follow these steps:

Step	Action
1	Click on the name of the folder where the document is stored.
2	Select the check boxes next to the files to be downloaded and click on the Download link.
3	Click on the Save button and choose or open the location to place the file.
4	Click Save again. The file will be downloaded.

---

### Moving Documents

Files stored in e-Builder can be moved from one folder to another within the same project or from project to project. When a file is moved, all of the history that has been recorded on it will move with it. **YOU MAY ONLY MOVE DOCUMENTS THAT YOU HAVE UPLOADED.** To move documents, follow these steps:

Step	Action
1	Click on the name of the folder where the document is stored.
2	Select the checkboxes next to the names of the files, and click the Move link. A new Internet Explorer window will open that will prompt you to select the folder that the files are to be moved to.
3	There is a drop-down menu at the top of the window to select the project you wish to move the folder to.
4	Click on the link of the new folder's name and click OK.

---

*Continued on next page*

## Document Functions, Continued

---

### Copying Documents

Files stored in e-Builder can be copied from one folder to another within the same project or copied to another project. When a file is copied, all of the history that has been recorded on it will start again with the new document. To copy documents, follow these steps:

Step	Action
1	Click on the name of the folder where the document is stored.
2	Select the check boxes next to the names of the files.
3	Click the Copy link. A new window will open.
4	Select a project from the drop-down menu for where the files are to be copied. The currently selected project's folder structure will be visible.
5	Click on the link of the new folder's name and click OK.

---

### Checking Out Documents

The Check Out feature in e-Builder allows users to hold exclusive rights to upload new versions of a document. When a document is checked out, all other users are blocked from uploading a new version of the file yet they maintain rights to view it. The benefit of using this feature is that all users are informed that one user is making updates to the file, so they are prevented from uploading changes to it while that user has it checked out. To check-out documents, follow these steps:

Step	Action
1	Click on the name of the folder where the document is stored.
2	Select the checkboxes next to the names of the files and click the Check Out link. A red check mark is displayed over the icon corresponding to the file type.
3	To undo the check out, click the Properties link under the file name and click the Undo Check Out button.

---

*Continued on next page*

## Document Functions, Continued

---

### **Sending Documents**

To send files to a party who may not have access to e-Builder or to a specific folder on a project, e-mail the files directly from the Documents module either individually or in groups. Only files in the same folder can be e-mailed, faxed or have notifications sent about them together. To send documents, follow these steps:

<b>Step</b>	<b>Action</b>
1	Click on the name of the folder where the file is stored.
2	Click on the send link underneath the file name. A new window will open.
3	Select the method in which the file(s) are to be sent and click Next.
4	Enter the appropriate information and click Send.

---

### **Emailing Documents into a Folder**

All folders can be email enabled to allow a party who may not have access to e-Builder or to a specific folder on a project, to e-mail the files directly to the Documents module. Check with your RM about enabling folders.

NOTE: only folders that have been enabled can receive emails. The Email & Fax Inbox is enabled by default.

To email into a document folder, follow these steps:

<b>Step</b>	<b>Action</b>
1	Click on the name of the folder where the email will be received
2	Click on the properties link at the top of the page. A new window will open.
3	Scroll down to Folder Access Options to find the email address for the folder.
4	Click on Copy to Clipboard
5.	Paste the address into the email address line and send.

---

# Forms Module

## Overview

---

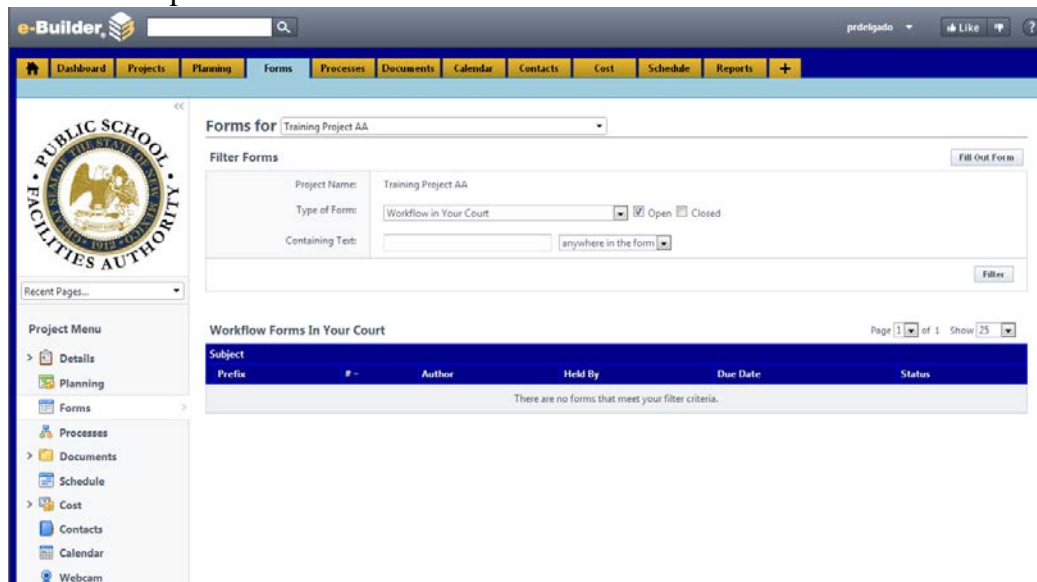
### Introduction

The e-Builder Forms module helps facilitate communication on project teams. A form is a set of data fields that is filled out in order to store information and report on it, or to pass information on to team members for them to take action on. The two form types in e-Builder are Static and Workflow. Static is used for informational purposes only and cannot be routed to other users. Workflow forms are routable forms which typically require action to be taken by another user.

---

### Accessing a Form

To access Forms, click on the Forms tab. Select the project by using the Go to Forms drop down menu.



*Continued on next page*

## Creating a Form

---

### Steps

To create a form within e-Builder, follow the steps below:

Step	Action
1	Go to the Forms tab
2	Select the project you need to fill out the form for by clicking the Go To Forms and use the drop-down box
3	Click the Fill Out Form button
4	Select the type of form you wish to create
5	Fill out the information in the header of the form
6	Select who should receive the form from the Send To drop-down box
7	In order for the form to be accessible for viewing by the entire project team, select each member from the CC: box. You may change the priority of the form. The default priority is Normal
8	Fill out the form's data fields, the required fields are noted in red.
9	Attach back up documentation if needed by clicking Attached Files tab. An Attach files screen will be displayed. You can attach documents to a form in three ways: <ul style="list-style-type: none"><li>• Method 1: Drag and drop files using the same upload procedure as defined in the Documents module.</li><li>• Method 2: Click the Add Files button in the Upload Documents section and select the file using the standard 'Microsoft Add File' method. It is important to note that you can only select one file at a time using this method.</li><li>• Method 3: Add files from the Project Documents tab by pressing the Add Files button in the "Add Files from e-Builder" section. Choose the Folder and you will see your folder structure for the selected project</li></ul>
10	Once complete, click Post Form. If you are not ready to post the form, click Save

---

*Continued on next page*

# Form Types

---

## Static

The following are Static Forms (informational only):

<b>Form</b>	<b>Description</b>
Communication Log	Form used to log key conversations amongst project team members.
Contractor Daily Job Report	PSFA form that all general contractors would use with a section documenting weather delays as well as Correction Notices.
Design Professional Field Report	PSFA form that the design professional can use if they wish or they can fill out the header and attach a PDF with meeting minutes.
Field Observation Report	PSFA form that the Construction Manager can use if they wish or they can fill out the header and attach a PDF with meeting minutes.
Inspections	Form used to log special inspections
Punch List	PSFA form that the general contractor can use if they wish or they can fill out the header and attach a PDF with meeting minutes.
Request for Additional Information/Documents	Missing information/documents to complete processing of project
Roof Observation Report	PSFA form that all roofing observers would use to document roof details.

---

## Workflow

The following are Workflow Forms (requires an action):

<b>Form</b>	<b>Description</b>
Action Item	Form used to route action items related to the project.
Correction Notice	Form sent to the contractor to inform them of deficiencies on the job-site.
Help desk request	Submit form when you need technical help
Notice to Surety	Used to Inform Surety Company of construction start for bond preparation.
Recovery Schedule Request	Form used to request recovery of time in the project schedule
Submittals	Form submitted by the contractor for submittals.
Termination of Contract	Form used to inform Contractor that their contract will be terminated

---

# Calendar and Meeting Minutes

## Overview

---

**Introduction** The calendar, contacts, and schedule modules are useful resource tools for project participants.

---

## Calendar Module

---

**Overview** The e-Builder Calendar Module is a project-specific calendar that brings all project participants, internally and externally, together. It integrates with Microsoft Outlook, synchronizing your e-Builder calendar events to your Outlook calendar. If your project team consists of multiple companies using multiple calendars, e-Builder functions as the central calendar management tool.

---

**Creating an Event** In e-Builder's Calendar module, events can be created at an account level or for an individual project. Each event can be scheduled to occur on a one-time basis or with a daily, weekly or monthly recurrence. To create an event, do the following steps:

Step	Action										
1.	Select a project from the 'Go to Project Calendar for' drop-down menu. (If an event is created without selecting a project, the event will not be associated with a project.)										
2.	Click the Add Event Button.										
3.	Fill in the fields as necessary. (The following are important fields) <table border="1"><thead><tr><th>Field</th><th>Description</th></tr></thead><tbody><tr><td>Meeting Type</td><td>Choose from the drop down menu or type your own.</td></tr><tr><td>Agenda Description</td><td>Enter the agenda or an event description.</td></tr><tr><td>Required Attendees</td><td>Click Lookup or enter email addresses</td></tr><tr><td>Attendees who can manage Meeting Minutes</td><td>Click Lookup or enter email addresses.  *this is required in order to create meeting minutes in this module.</td></tr></tbody></table>	Field	Description	Meeting Type	Choose from the drop down menu or type your own.	Agenda Description	Enter the agenda or an event description.	Required Attendees	Click Lookup or enter email addresses	Attendees who can manage Meeting Minutes	Click Lookup or enter email addresses.  *this is required in order to create meeting minutes in this module.
Field	Description										
Meeting Type	Choose from the drop down menu or type your own.										
Agenda Description	Enter the agenda or an event description.										
Required Attendees	Click Lookup or enter email addresses										
Attendees who can manage Meeting Minutes	Click Lookup or enter email addresses.  *this is required in order to create meeting minutes in this module.										
3.	Enter a title for the meeting in the What field.										

---

*Continued on next page*



## Calendar Module, Continued

---

### Creating an Event (continued)

Step	Action
4.	Enter start and end dates and times along with recurrence information, if needed.
5.	Fill in other fields as necessary.
6.	Enter attendees manually or by using the Lookup button. Click Save and the invitation will be sent to the attendees e-mail calendar.

---

### Editing or Deleting an Event

To edit or delete an event, follow these steps:

Step	Action
1.	Select a project from the Go to Project Calendar for drop-down menu.
2.	Click on the link with the event name.
3.	Click the Edit button and make the necessary changes or click the delete button and click Yes, Delete the Event
4.	If editing click Save (Attendees are e-mailed the updated event information.)

---

**Calendar Views** Within a project calendar, a user can view the calendar by workweek, week, day, month, or a 30 day look ahead at events contained across all projects. To see calendar views, do the following steps:

Step	Action
1.	Select a project from the 'Go to Project Calendar for' drop-down menu.
2.	To view by day, week, or month, click the appropriate tab (the default view is by work week).
3.	To view a 30 day 'look ahead' of all events across all projects, click on the Upcoming Events tab.
4.	To print within any view, click on Print link.

---

# Meeting Minutes

---

## Overview

The Meeting Minutes component allows the minute taker to record discussion topics within e-Builder. The review and approval mechanism ensures that all participants agree with notes and action items before minutes are published. Optionally, you can assign action items using an assigned form type. Action items are updated in real time, so all participants are aware of item status before the next meeting. The Meeting Minutes component also gives you the ability to carry open items forward from previous meetings, allowing you to keep track of your progress.

---

## Event Details Page

The Events Details page allows you to view and edit event details. From the Meeting Items tab, you can also take a number of actions regarding meeting minutes.

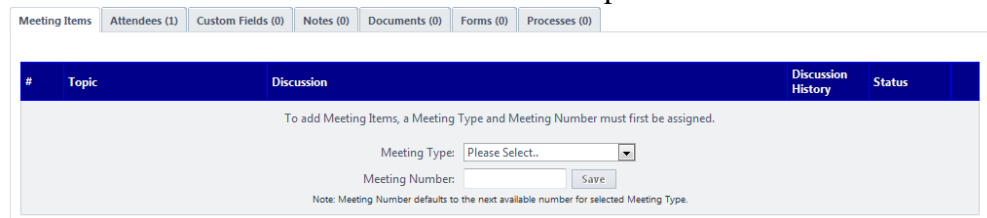
---

## Add Meeting Minutes

**To add meeting minutes the user must have been added to the *Attendees who can manage Meeting Minutes* field in the original event.**

To add meeting minutes go to the Event Details page and follow the steps below. The Meeting Items tab is automatically selected.

1. Click the Meeting Type drop-down menu and select the meeting type.  
\*Note: The Meeting Number field automatically defaults to the next available number for the selected meeting type, but you can also enter a meeting number.
2. Click Save.
3. Click the Topic drop-down menu to select a topic or enter free form text in this field.
4. In the Discussion area, enter the topic discussion.
5. Click the Add link located left of the Topic column.



#	Topic	Discussion	Discussion History	Status
To add Meeting Items, a Meeting Type and Meeting Number must first be assigned.				
Meeting Type: <input type="text" value="Please Select.."/>				
Meeting Number: <input type="text"/> <input type="button" value="Save"/>				
Note: Meeting Number defaults to the next available number for selected Meeting Type.				

*Continued on next page*

## Meeting Minutes, Continued

---

**Carry Forward** An item can only be carried forward if the meeting minutes for which that item belongs to have been published and is still in open status. Carrying items forward from a previous meeting allows you to keep track and address open items.

To carry open items forward:

1. Go to the Event Details page
  2. Click Add Open Items.
  3. Select the checkbox next to the item(s) you want to carry forward.
  4. Click Carry Forward.
- 

### **Add Action Items**

Action items can be added to meeting minutes for transparency into required actions and responsible parties. Action items are updated in real time. Once the form is filled out and posted by the assigned individual, the status will automatically update in the meeting minutes for all event attendees to see.

To add an existing action item:

1. Go to the Event Details page.
2. Click the Existing link in the Action Req. column. (The Attach Forms from [Account Name] page displays).
3. Select the checkbox next to the form(s) you want to add.
4. Click Attach.

To add a new action item:

5. Go to the Event Details page.
6. Click the New link in the Action Req. column. (The Fill Out Form page displays.)
7. Enter all required fields.
8. Click Post Form.
- 9.

Note: Action items can only be added to the most recent meeting. Otherwise, the option is not available.

---

*Continued on next page*

## Meeting Minutes, Continued

---

### Updating Attendance

The meeting organizer can indicate whether or not an invited member attended the meeting or not. To update attendance, do the following steps:

Step	Action
1.	Select a project from the Go to Project Calendar for drop-down menu.
2.	Click on the link with the event name.
3.	Click on the Update Attendance Button.
4.	Select the checkbox under the Attended column (for each member that was present). e-Builder will ask if you want to update only added/deleted attendees. Make the desired choice.
5.	Click Save

---

### Sending Meeting Minutes

Meeting minutes can be sent to participants via email for their review prior to publishing.

To send meeting minutes:

1. Go to the Event Details page
2. Click Send Meeting Minutes. A new window opens, click Add Attendees, enter a Subject and a message (optional)
3. Click Send

### Publish Meeting Minutes

Publishing meeting minutes makes them available to all attendees when they access the Calendar module. ***You will no longer be able to edit the meeting minutes once they are published***, but you will still be able to modify meeting status.

To publish meeting minutes:

1. Go to the Event Details page
  2. Click Publish. You are prompted for confirmation.
  3. Click OK.
-

# Cost Menu

## Overview

### Introduction

The e-Builder cost module helps manage the cost management processes that owners, general contractors, and other industry participants go through in construction. It standardizes the tracking of costs across an entire program. The cost module also eases the burden of reporting on Budgets, Change Orders, Actual Costs, and more through the reports in the reports module. These reports can be generated or modified to track any of the data entered in the cost module.

Line Item	Description	A Current Budget *	B Current Commitments *	C Actuals Approved *	D Estimate At Completion	E B - A Current Over/ (Under)	F Projected Over/ (Under)
100-110	Project Development	0.00	0.00	0.00	0.00	0.00	0.00
100-120	Professional Services	0.00	0.00	0.00	0.00	0.00	0.00
100-130	Quality Assurance	0.00	0.00	0.00	0.00	0.00	0.00
100-140	Legal/Accounting/Fees	0.00	0.00	0.00	0.00	0.00	0.00
200-210	Construction	10,100,000.00	0.00	0.00	10,100,000.00	(0,100,000.00)	(0,100,000.00)
200-220	Demolition	0.00	0.00	0.00	0.00	0.00	0.00
200-230	Temp Facilities	0.00	0.00	0.00	0.00	0.00	0.00
300-310	FF&E	0.00	0.00	0.00	0.00	0.00	0.00
300-320	Moving/Storage/Etc.	0.00	0.00	0.00	0.00	0.00	0.00
900-910	Contingency	0.00	0.00	0.00	0.00	0.00	0.00
900-920	Reversion (Finance Only)	0.00	0.00	0.00	0.00	0.00	0.00
900-930	Project Balance (Finance Only)	0.00	0.00	0.00	0.00	0.00	0.00
Totals		10,100,000.00	0.00	0.00	10,100,000.00	(10,100,000.00)	(10,100,000.00)

### Viewing Cost Information

Since e-Builder is role and permission based, only certain users will have access to the Project Cost Summary. The main roles involved in this view include the District Representative and Regional Manager. The Design Professional and General Contractor will not even see the Project Cost Summary as an option in the lower left Project Menu.

# Processes

## Overview

**Introduction** The e-Builder Process Module facilitates collaboration by providing a mechanism to route information based on defined business rules, track communications and ensure accountability for all parties along the process work path.

Matrix of Roles, Initiators and Responders for Processes	Contract Administrator (CA)		Deputy Director (DDIR)		Design Professional (DP)		District Financial Specialist (DFS)		District Representative (DR)		EdSpec Planner		Field Coordinator		Facilities Specialist		Financial Specialist (FS)		FMP Vendor		General Contractor (GC)		Maintenance		Master Planner		Planning Admin		Planning & Design Manager		Regional Manager (RM)		Roofing Consultant (RC)		Senior Facilities Manager (SFM)					
	RESP	INIT	RESP	INIT	RESP	INIT	RESP	INIT	RESP	INIT	RESP	INIT	RESP	INIT	RESP	INIT	RESP	INIT	RESP	INIT	RESP	INIT	RESP	INIT	RESP	INIT	RESP	INIT	RESP	INIT	RESP	INIT	RESP	INIT	RESP					
11 Month Correction (11MC)						x	x																																	
Additional Design Services Request (ADSR)			x		x	x	x			x									x																					
Architect Supplemental Instructions (ASI)						x	x																																	
Change Order (CO)			x		x	x	x			x									x																					
Commitment Approval (COM)			x		x					x	x								x																					
Document Closeout (DC)							x				x																													
Ed Spec Review (ESR)												x	x																											
Facility Master Plan Review (FMP)																																								
GC Pay Application (Pay App) Setup (PAYAP)																																								
Modification Change Request (MCR)							x				x																													
Owner Design Review (ODR)							x				x																													
Request for Approval of School Construction (Non - PSCOC) (RASCN)							x	x			x																													
Request for Approval of School Construction (PSCOC) (RASC)							x	x			x																													
Request For Information (RFI)			x		x			x	x		x																													
Schedule Of Values Setup (SOV)																																								
Substantial Completion (SC)																																								
Vendor Invoice (VI)																																								

## Filtering Processes

### Overview

To view a subset of processes within a project you have been provided with a filter. This filter allows you to select form types or grouping of process types with certain filter criteria to quickly find processes you require.

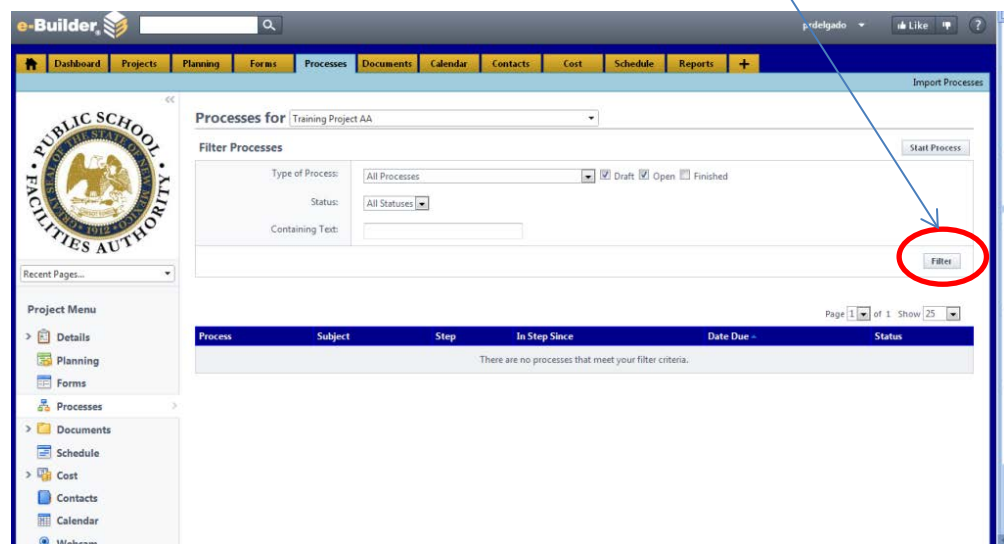
### Filter Fields

To filter for processes, you must select the following selections in the Filter Processes area:

Selection	Description
Type of Process (Drop Down)	The process type or grouping of process (e.g. Processes In My Court, Processes I Initiated, All Processes, Potential Change Order, Request for Information, Project Issue, etc.).
Status (Drop-Down)	Displays the status of the process, more specific
Step Name (Drop-Down)	This field allows you to search based on a drop-down list of selections so that you are certain you are selecting terms exactly as they are spelled. Only one item can be selected per search.
Draft, Open or Finished (Check Box)	The state the process is in
Containing Text	Key words contained within a process.

Once the filtering criteria is determined, click the **Filter** button located on the right hand side. Note that some of the functions will be disabled based on other selections made.

### Example



# Commitment Approval

---

## Overview

The Commitment process is initiated by the local district representative. The local school district is responsible for the management of the procurement process and is responsible for issuing their purchase orders and executing contracts, as required, before the PSFA creates purchase orders for their share of the project scope. In cases of direct project management by PSFA of under certain other conditions, the RM may initiate the process.

---

## Actors

The following project participants are involved in the process:

**District Representative (DR)** initiates the process and coordinates the procurement of the vendor and is responsible for attaching the correct backup documentation and the indicated State/District contribution.

**Regional Manager (RM)** may initiate the process and reviews the commitment scope and price.

**Design Professional (DP)** is responsible for reviews to the GC contracts and also is responsible for executing professional services agreement's related to design.

**Contract Administrator (CA)** reviews the contract backup provided by the RM and the DR and confirms the proposed funding distribution is appropriate.

**Deputy Director (DDIR)** confirms the contract backup and funding distribution provided by the RM and the DR is appropriate.

**Financial Specialist (FS)** is responsible for encumbering the commitment in PeopleSoft and generating the Purchase Order Number.

Step Name	Actor(s)	Non-actor(s)
Initiator	DR, RM	All Internal PSFA Project Participants and Design Professional
DP Review	DP	All Internal PSFA Project Participants and District Representative
DR P.O.	DR	All Internal PSFA Project Participants and Design Professional
RM Review	RM	All Internal PSFA Project Participants and District Representative, Design Professional
CA Review	CA	All Internal PSFA Project Participants and District Representative, Design Professional
DDIR Review	DDIR	All Internal PSFA Project Participants and District Representative, Design Professional
FS Review	FS	All Internal PSFA Project Participants and District Representative, Design Professional
Finish	None	All Internal PSFA Project Participants and District Representative, Design Professional

*Continued on next page*



## Commitment Approval, Continued

---

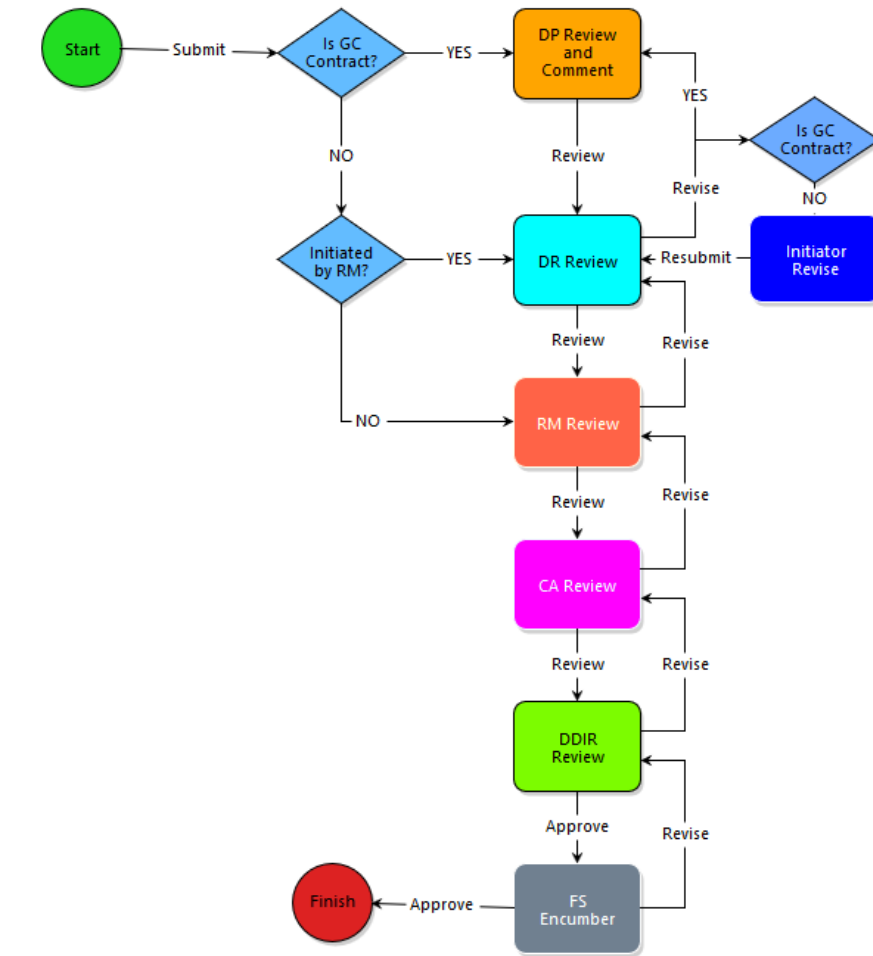
- Process Details** The following steps are taken for each process instance:
1. DR or RM initiates the Commitment Approval process:
    - a. Initiator indicates if the commitment is a GC contract.
      - i. If the commitment is a GC contract, the process moves to Step 2.
      - ii. If the commitment is not a GC contract, the process proceeds to a conditional check to determine if the process was submitted by the RM.
        1. If the process was submitted by the RM, the process moves to step 3
        2. If the process was not submitted by the RM, the process moves to step 4
      - iii. Status changes to pending.
  2. DP prepares a draft of the PSA for DR and RM review and approval:
    - a. DP executes PSA.
  3. DR receives executed vendor agreements or contracts:
    - a. DR prepares District Purchase Order.
    - b. DR requests revision to the vendor agreement or contract from the DP.
  4. RM receives executed vendor agreements or contracts:
    - a. RM requests revision to the district P.O. from the DR.
    - b. RM reviews and sends to the CA.
  5. CA reviews District PO and funding distribution:
    - a. CA submits the commitment for approval.
    - b. CA requests a revision to the vendor agreement or contract from the RM.
  6. DDIR reviews District PO and funding distribution:
    - a. DDIR submits the commitment for approval.
    - b. DDIR requests a revision to the vendor agreement or contract from the CA.
  7. FS reviews the District PO and funding distribution:
    - a. FS requests a revision to the commitment from the DDIR.
    - b. FS performs offline process to prepare State Purchase Order.
    - c. FS approves the process.
      - i. RM, DR, and DFS are notified.
      - ii. Process Finishes.
    - d. Status changes to approved

---

*Continued on next page*

# Commitment Approval, Continued

Process Flow Diagram



# Commitment Change

---

**Overview**

The Commitment Change process is initiated by the local district representative, but may be initiated by the PSFA RM under direct administration projects or under certain other conditions when necessary. The local school districts are responsible for initiating any change in scope related to agreements, purchase orders or contracts.

---

**Actors**

The following project participants are involved in the Commitment Change process:

**Initiator (DR or RM)** starts the process.

**Regional Manager (RM)** reviews the commitment change after it is received from the DR.

**Financial Specialist (FS)** is responsible for encumbering the commitment change in State financial system.

**District Representative (DR)** coordinates the commitment change of the vendor and is responsible for attaching the correct backup documentation and the indicated State/District contribution.

**Contract Administrator (CA)** reviews the commitment change backup provided by the RM and the DR and confirms the proposed funding distribution is appropriate.

**Deputy Director (DDIR)** confirms the commitment change backup and funding distribution provided by the RM and the DR is appropriate.

Step Name	Actor(s)	Non-actor(s)
Start	DR, RM	All Internal PSFA Project Participants and Design Professional
DR Review	DR	All Internal PSFA Project Participants and Design Professional
RM Review	RM	All Internal PSFA Project Participants and District Representative, Design Professional
CA Review	CA	All Internal PSFA Project Participants and District Representative, Design Professional
DDIR Review	DDIR	All Internal PSFA Project Participants and District Representative, Design Professional

*Continued on next page*

## Commitment Change, Continued

---

### Actors (continued)

Step Name	Actor(s)	Non-actor(s)
FS Review	FS	All Internal PSFA Project Participants and District Representative, Design Professional
Finish	None	All Internal PSFA Project Participants and District Representative, Design Professional

---

- Process Details**
1. DR or RM initiates the process:
    - a. DR/RM enters the commitment change details and indicates if the commitment change is to a GC contract.
      - i. If the commitment change is to a GC contract, the process moves to Step 2.
      - ii. If the commitment is not to a GC contract, the process proceeds to a conditional check to determine if the process was submitted by the RM.
        1. If the process was submitted by the RM, the process moves to step 3
        2. If the process was not submitted by the RM, the process moves to step 4
      - iii. Status changes to pending.
    2. DR receives executed vendor agreements or contracts:
      - a. DR prepares District Purchase Order.
      - b. DR requests revision to the vendor agreement or contract from the DP.
    4. RM reviews the commitment change:
      - a. RM distributes funding and submits it to the CA
      - b. RM requests a revision from the DR.
        - i. DR makes requested change and resubmits the commitment change to the RM.
    5. CA reviews the commitment change:
      - a. CA submits the commitment change to the DDIR.
      - b. CA requests a revision from the RM.
        - i. RM makes requested changes and resubmits the commitment change to the CA.

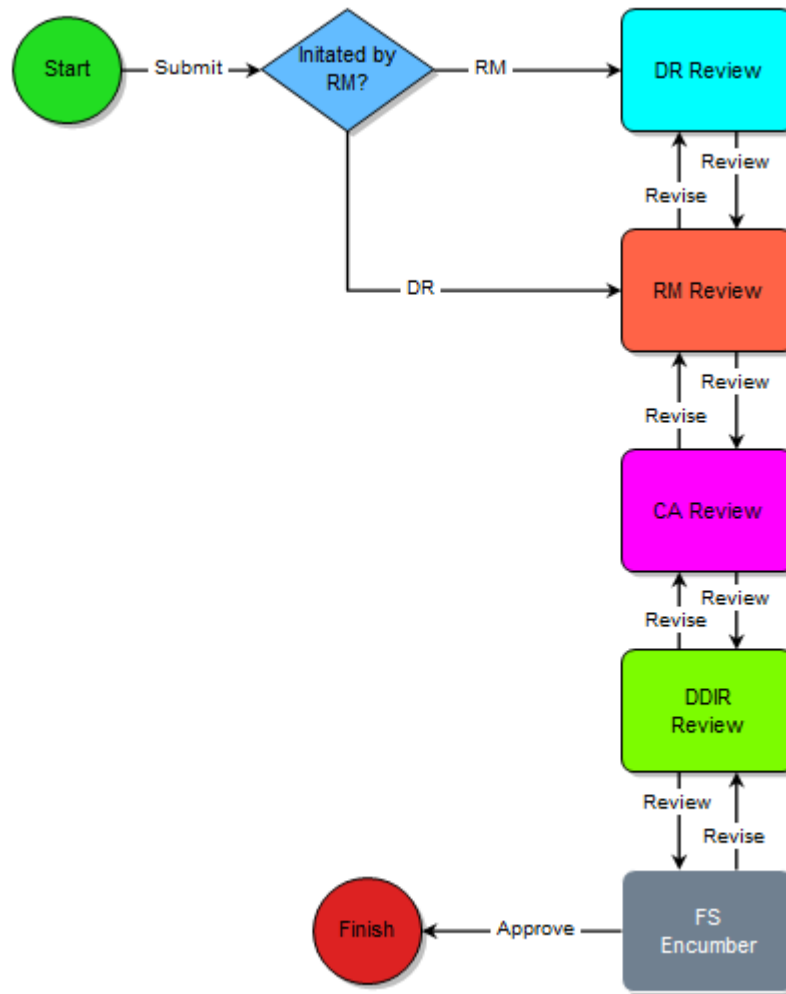
---

*Continued on next page*

## Commitment Change, Continued

- Process Details** (continued)
6. DDIR reviews the commitment change:
    - a. DDIR submits the commitment change to the FS.
      - i. Status changes to approved.
    - b. DDIR requests a revision from the CA.
      - i. CA makes requested changes and resubmits the commitment change to the DDIR.
  7. FS reviews the commitment change:
    - a. FS updates State financial system and ends the process.
      - i. The process finishes.
      - ii. Notifications are sent to the RM, DR, and DFS.

### Process Flow Diagram



# Owner Design Review (ODR)

---

## Overview

The Owner Design Review process is utilized to gather all the necessary files and information for the submission of a Request for Approval for School Construction (RASC PSCOC). This information is reviewed by the District Representative and Regional Manager which results in the spawning of the RASC PSCOC process.

---

## Actors and View Permissions

The following project participants are involved in the client process:

**Design Professional:** The initiator starts the process instance. The Design Professional is the only role that can initiate the RASC (PSCOC).

**District Representative:** The DR reviews all RASC (PSCOC) Processes.

**Regional Manager:** The Regional Manager reviews all RASC (PSCOC) Processes.

Step Name	Actor(s)	Non-actor(s)
Start	DP	All internal NMPSFA project participants, Design Professional
DR and RM Review	DR, RM	All internal NMPSFA project participants, District Representative
Finish	None	All internal NMPSFA project participants, Design Professional, District Representative

---

## Process Details

The following steps are taken for each process instance:

1. Design Professional enters the required information and may:
  - a. Submit the process.
    - i. Process proceeds to the Regional Manager and the District Representative for review.
    - ii. Status changes to Pending.
2. Regional Manager and District Representative review the process and may:
  - a. Return the process to the Design Professional for revision.
    - i. DP revises the process and resubmits to the RM and DR
  - b. Review the process to Spawn the RASC process
    - i. Process automatically initiates an instance of the RASC process

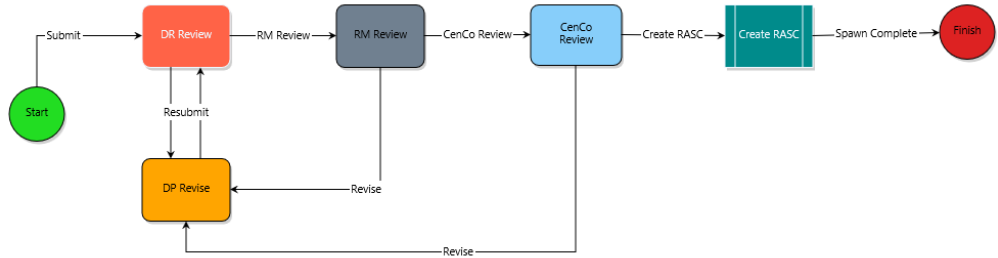
---

*Continued on next page*

# Owner Design Review (ODR), Continued

---

## Process Workflow



# Request for Approval of School Construction (PSCOC) (RASC PSCOC)

**Overview**

RASC PSCOC Plan Review processes in e-Builder will be used to route the relevant documents contained in the plans electronically. Throughout the routing of plans, the relevant project participants will automatically be notified as the Plan Review moves through the process and is approved. This process is generally started by the Spawned ODR process.

**Actors and  
View  
Permissions**

The following project participants are involved in the process:  
**Regional Manager (RM)** starts the process instance.  
**Planning Admin (PA)** reviews all RASC (PSCOC) Processes  
**Facilities Specialist (FS)** reviews all RASC (PSCOC) Processes.  
**SD Maintenance Approval** reviews the Schematic Design Phase only  
**FMP Review** reviews Program Statement Phase only  
**Planning & Design Manager (PDM)** reviews all RASC (PSCOC) Processes.

Step Name	Actor(s)	Non-actor(s)
Start	Regional Manager	All internal NMPSFA project participants, District Representative
PA Review	Planning Admin	All internal NMPSFA project participants
SD Maintenance Approval	SD Maintenance Approval – Schematic Design Phase Only	All internal NMPSFA project participants
FS Review	Facilities Specialist	All internal NMPSFA project participants
FMP Review	reviews Program Statement Phase only	All internal NMPSFA project participants
FS Documents	Facilities Specialist	All internal NMPSFA project participants
P&D Mgr Review	Planning & Design Manager	All internal NMPSFA project participants, District Representative
PA Enter Permit Info.	Planning Admin	All internal NMPSFA project participants
Finish	None	All internal NMPSFA project participants

*Continued on next page*



# Request for Approval of School Construction (PSCOC) (RASC PSCOC), Continued

---

- Process Details** The following steps are taken for each process instance:
1. Regional Manager enters required information and may:
    - a. Submit the process.
      - i. Process proceeds to the Planning Admin for review.
      - ii. Status changes to Pending
  2. Planning Admin receives the process and may:
    - a. Return the process to the RM for revision.
      - i. Notify SFMA
      - ii. RM revises the process and resubmits to the PA.
        1. Notify SFMA
    - b. Review the process.
      - i. Process proceeds to the Facilities Specialist.
      - ii. If SD Phase proceeds to Maintenance Approval Review
  3. Facilities Specialist receives the process and may:
    - a. If PS Phase sends to FMP Review
    - b. Request a comment from PED.
      - i. Return the process to the DP for revision.
      - ii. DP revises the process and resubmits to the FS.
    - c. Review the process.
      - i. Process proceeds to a new step for the Facilities Specialist to send the RASC to CID, PED, and SFMO (Step 6).
  4. Facilities Specialist receives the process and may:
    - a. Send the RASC to CID, PED, and SFMO for review (outside of e-Builder).
      - i. FS will enter the date sent and date returned for the CID, PED, and SFMO.
    - b. Review the process.
      - i. Process proceeds to the Planning & Design Manager.
  5. Planning & Design Manager receives the process and may:
    - a. Return the process to the FS for revision.
      - i. FS revises the Documents and resubmits to the P&D Mgr.
    - b. Review the process.
      - i. Process proceeds to the Planning Admin.

---

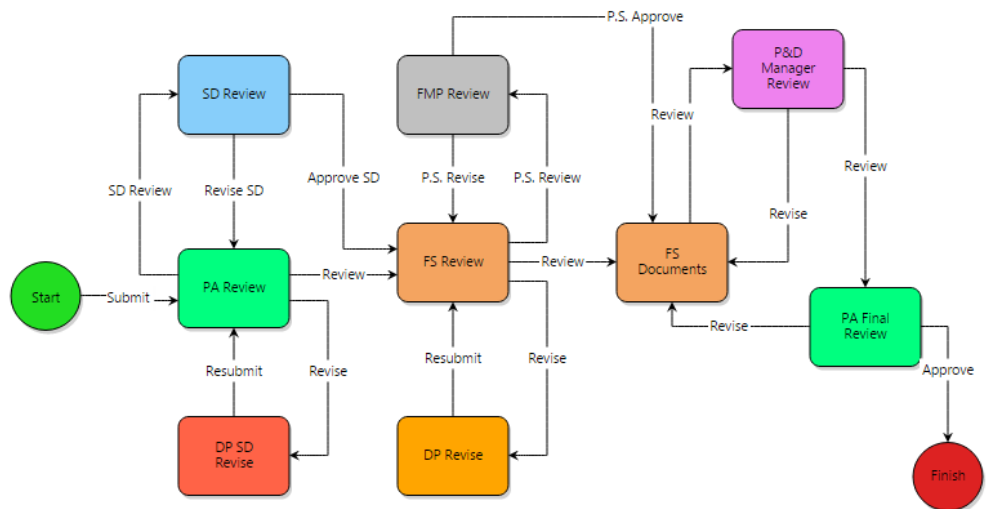
*Continued on next page*

# Request for Approval of School Construction (PSCOC) (RASC PSCOC), Continued

**Process Details**  
(continued)

6. Planning Admin receives the process and may:
  - a. Print a hard copy mail merge of the RASC Award Document, attach a hard copy of the SFMO acceptance letter, and send to the District (outside of e-Builder).
  - b. Return the process to the FS for revision.
    - i. FS revises the process and resubmits to the Planning Admin.
  - c. Approve the process.
    - i. Process finishes.
    - ii. Status changes to Approved.
    - iii. The Regional Manager, District Representative, and Design Professional will receive approval notification.

**Process Workflow**



# Schedule Of Values (SOV)

---

## Overview

As required per the terms of the General Conditions, the General Contractor is obligated to provide a Schedule of Values (SOV) to detail the line items within their contract. Prior to the first billing, the SOV must be approved by the Owner(s).

By managing the SOV Setup Process within the e-Builder system, PSFA will be able to enforce the owner(s) obligations to approve the SOV prior to the first General Contractor Billing. Due to the transparency of the process, Contractors will be able to assess where their SOV approval sits in real time. The SOV Setup Process will also facilitate the assignment of funding source rules for each line item in the SOV.

---

## Actors and View Permissions

The following project participants are involved in the process:

**General Contractor** starts the process instance. GC is the only role that can initiate the SOV process. The GC also confirms the imported commitment line item values.

**Design Professional (DP)** is responsible for reviews the SOV in excel form.

**District Representative (DR)** reviews the SOV in excel form.

**Regional Manager (RM)** reviews the SOV in excel form and executes the SOV import after approval.

Step Name	Actor(s)	Non-actor(s)
Initiator	GC	All Internal PSFA Project Participants and DP, DR,
DP Review	DP	All Internal PSFA Project Participants and GC
DR Review	DR	All Internal PSFA Project Participants and GC
RM SOV Import	RM	All Internal PSFA Project Participants and DP, DR, GC
GC Revise	GC	All Internal PSFA Project Participants and DP, DR
GC Confirm	GC	All Internal PSFA Project Participants DP, DR
Finish		All Internal PSFA Project Participants DP, DR, GC

---

*Continued on next page*

## Schedule Of Values (SOV), Continued

---

- Process Details** The following steps are taken for each process instance:
1. GC initiates the SOV Setup Process:
    - a. GC selects commitment from list of available commitments for their company.
    - b. GC may download the SOV template. (.XLS)
      - i. GC attaches an Excel copy of the proposed SOV and submits the process.
  2. DP receives the SOV:
    - a. DP accepts the SOV attachment.
    - b. DP requests the GC to re-submit an Excel copy of the proposed SOV.
      - i. GC re-attaches an updated Excel copy of the proposed SOV and resubmits.
  3. DR receives the SOV:
    - a. DR accepts the SOV attachment.
    - b. DR requests the GC to re-submit an Excel copy of the proposed SOV.
      - i. GC re-attaches an updated Excel copy of the proposed SOV and resubmits.
  4. RM initiates SOV Import Wizard:
    - a. RM accepts the SOV attachment.
      - i. RM distributes (imports) funding sources across SOV line items.
    - b. RM submits SOV for GC review.
      - i. RM requests the GC to re-submit an Excel copy of the proposed SOV.
      - ii. GC re-attaches an updated Excel copy of the proposed SOV and resubmits.
  5. The GC reviews the imported SOV:
    - a. GC accepts the SOV.
      - i. THE PROCESS ENDS.
    - b. GC rejects the SOV.
      - i. GC re-attaches an updated Excel copy of the proposed SOV.
      - ii. The process is re-routed to step 2.

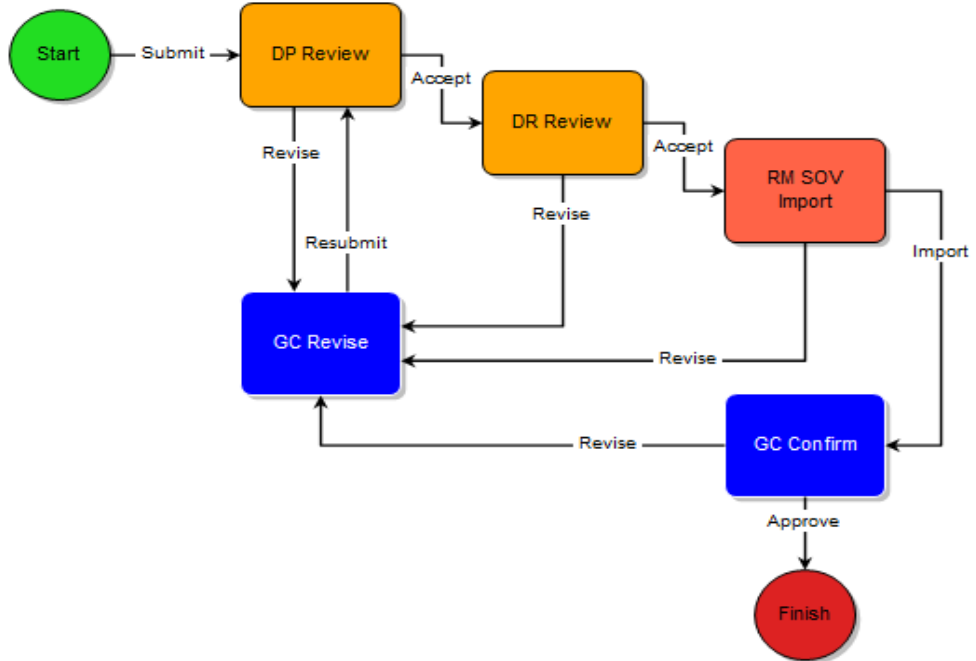
---

*Continued on next page*

# Schedule Of Values (SOV), Continued

---

## Process Workflow



# Request for Information (RFI)

---

## Overview

The RFI process is used to manage questions and responses with regard to a project. Though most often generated during the construction phase of a project, the RFI may be created during any phase. The GC sends RFIs to ask questions or obtain information regarding the contract documents. RFIs are sent to the DP who in turn may obtain input from others and may provide a response to the GC. Results of an RFI may lead to a cost and/or schedule impact, where the RFI Initiator will have the final decision on whether to allow the RFI to generate an associated MCR. The RFI response does not authorize the GC to proceed with work involving additional time or cost. The authorization must be obtained through an MCR.

---

## Actors and View Permissions

The following project participants are involved in the client process:  
**District Representative (DR)** can initiate this process.  
**District Staff Architect (DSA)** can initiate this process  
**General Contractor (GC)** can initiate this process.  
**Regional Manager (RM)** can initiate this process.  
**Design Professional (DP)** is responsible to coordinate and document responses to RFIs.

Step Name	Actor(s)	Non-actor(s)
Start	Initiator	All Project Participants
DP Evaluate	DP	All Project Participants
Initiator Clarify	Initiator	All Project Participants
Initiator Confirm	Initiator	All Project Participants
DP Clarify	DP	All Project Participants
Finish	None	All Project Participants

---

*Continued on next page*

# Request for Information (RFI), Continued

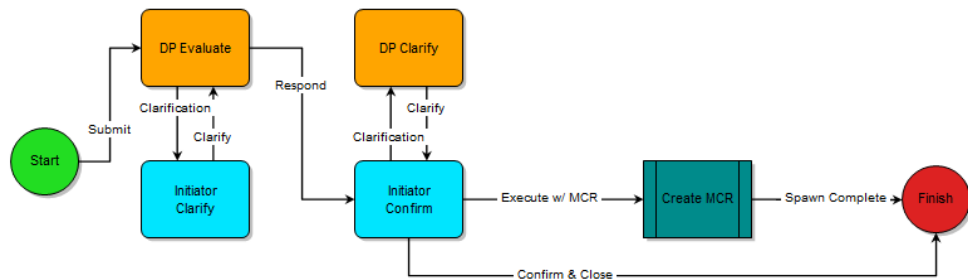
---

**Process Details** The following steps are taken for each process instance:

1. Initiator will start the RFI process:
  - a. Initiator enters the RFI question and suggestion.
  - b. RM and DR receives notification.
2. The DP evaluates the RFI:
  - a. DP requests clarification from the initiator.
    - i. The initiator responds to the DP.
  - b. DP responds to the Initiator.
3. The Initiator reviews the response:
  - a. Initiator requests clarification from the DP.
    - i. The DP responds to the Initiator.
  - b. Initiator confirms the response and initiates a MCR.
    - i. After completion of the MCR, the process ends.
  - c. Initiator confirms the response and closes the RFI.
    - i. The process ends.

---

## Process Workflow



# Architect Supplemental Instructions (ASI)

---

## Overview

ASIs are used during the construction phase of a project. The ASI process is used for instructions issued by the Design Professional to the Contractor.

---

## Actors and View Permissions

The following project participants are involved in the client process:  
**Design Professional (DP)** starts the process instance. The Design Professional is the only person who can start the ASI Process and enters instructions and other project related information.  
**General Contractor (GC)** reviews the ASI and can confirm and close the process or spawn an MCR.

Step Name	Actor(s)	Non-actor(s)
Start	DP	All internal NMPSFA project participants, District Representative
GC Review	GC	All internal NMPSFA project participants, District Representative, Design Professional
DP Clarify	DP	All internal NMPSFA project participants, District Representative
Finish	None	All internal NMPSFA project participants, District Representative, Design Professional

---

*Continued on next page*



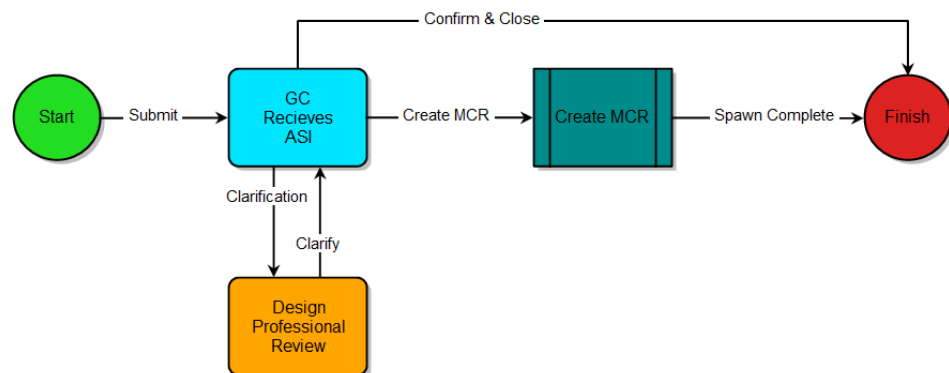
# Architect Supplemental Instructions (ASI), Continued

---

- Process Details** The following steps are taken for each process instance:
1. The Design Professional will enter instructions and other project related information:
    - a. The Design Professional submits the ASI process to the GC for review:
      - i. Status changes to pending.
  2. GC receives the ASI and May:
    - a. Return to the Design Professional for Clarification:
      - i. Notification is sent to the RM and DR.
        1. Design Professional revises and returns the ASI to the GC
          - a. Notification is sent to the RM and DR
    - b. Confirm the instruction from the Design Professional and close the process:
      - i. Process closes.
      - ii. Status changes to approved.
    - c. Execute an MCR (See MCR Process Requirements for Details):
      - i. If there is an impact to cost or schedule then an MCR will be executed.
      - ii. Once the MCR is approved the ASI process closes.
      - iii. Status changes to approved.

---

## Process Workflow



# Additional Design Services Request (ADSR)

---

## Overview

Any Change Request will be initiated through an MCR process. Based on the request, the owner will choose to reject the MCR or to proceed with the request. If the request requires additional design services, an ADSR would be initiated to obtain approval on the change to the design contract. If a request does not require additional design services, or immediately following the approval of the ADSR, an MCR would be initiated to obtain approval on the requested change to the GC's contract.

---

## Actors and View Permissions

The following project participants are involved in the process:

**Design Professional (DP)** is responsible for initiating the ADSR.

**District Representative (DR)** reviews the ADSR initiated by the DP.

**Regional Manager (RM)** reviews the ADSR initiated by the DP.

**Contract Administrator (CA)** reviews the contract backup provided by the RM and the DR and confirms the proposed funding distribution is appropriate.

**Deputy Director (DDIR)** confirms the contract backup and funding distribution provided by the RM and the DR is appropriate.

**Financial Specialist (FS)** is responsible for updating the commitment in Peoplesoft.

Step Name	Actor(s)	Non-actor(s)
Initiator, DP Revise	DP	All Internal PSFA Project Participants and District Representative
DR Scope Review	DR	All Internal PSFA Project Participants and District Representative
RM Scope Review	RM	All Internal PSFA Project Participants and District Representative
DP Proposal	DP	All Internal PSFA Project Participants and District Representative
RM Proposal Review	RM	All Internal PSFA Project Participants and District Representative
DR Proposal Review	DR	All Internal PSFA Project Participants and District Representative
CA Proposal Review	CA	All Internal PSFA Project Participants and District Representative

*Continued on next page*

## Additional Design Services Request (ADSR), Continued

---

### Actors and View Permissions (continued)

Step Name	Actor(s)	Non-actor(s)
DDIR Proposal Review	DDIR	All Internal PSFA Project Participants and District Representative
FS Proposal Review	FS	All Internal PSFA Project Participants and District Representative
Finish	None	All Internal PSFA Project Participants and District Representative

---

### Process Details

The following steps are taken for each process instance:

1. DP initiates the Additional Design Services Request process:
  - a. DP submits the ADSR to the DR.
    - i. Status changes to pending.
2. DR reviews the ADSR:
  - a. DR submits the ADSR to the RM for review.
  - b. DR requests a revision from the DP.
    - i. DP makes the requested revision and resubmits to the DR.
3. RM reviews the ADSR:
  - a. RM directs to the DP to Price and Proceed.
  - b. RM directs the DP to Price Only.
  - c. RM requests a revision from the DP.
    - i. DP makes the requested revision and resubmits to the DR.
4. DP prepares pricing for ADSR:
  - a. DP submits the proposal to the DR.
5. DR reviews DP proposal:
  - a. DR submits the DP proposal for approval.
  - b. DR requests a revision from the DP.
    - i. DP makes the requested revision and resubmits to the DR.

---

*Continued on next page*

## Additional Design Services Request (ADSR), **Continued**

---

### **Process Details** (continued)

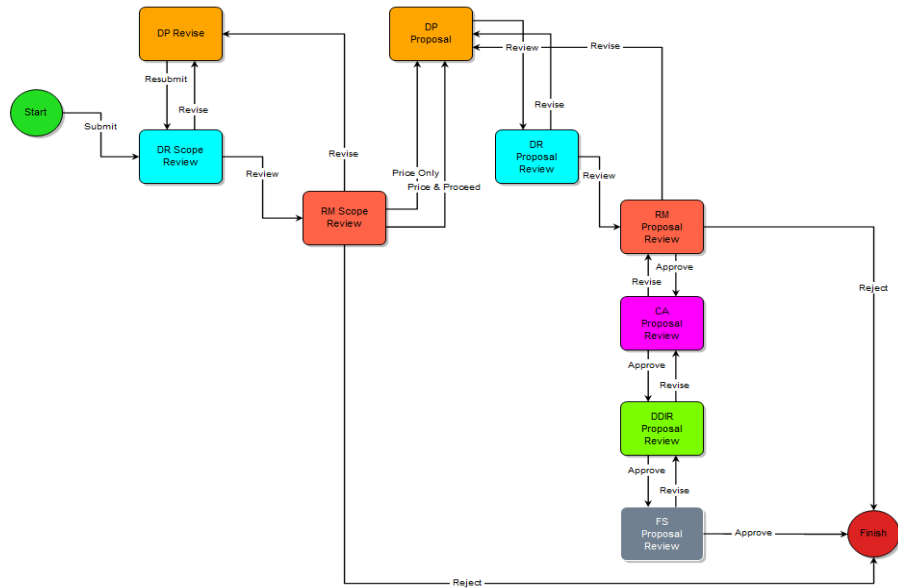
6. RM reviews DP proposal:
  - a. RM approves proposal and submits to the CA.
  - b. RM rejects the proposal.
    - i. The process finishes.
    - ii. Status changes to rejected.
  - c. RM requests a revision from the DP
    - i. DP makes the requested revision and resubmits to the DR.
7. CA review the DP proposal:
  - d. CA approves proposal and submits to the DDIR.
  - e. CA requests a revision from the RM.
    - i. RM makes the requested revision and resubmits to the CA.
8. DDIR reviews the DP proposal:
  - f. DDIR approves proposal and submits to the FS.
  - g. DDIR requests a revision from the CA.
    - i. CA makes the requested revision and resubmits to the DDIR.
9. FS reviews the DP proposal:
  - h. FS updates Peoplesoft
    - i. The process finishes.
    - ii. Status changes to approved.
  - i. FS requests a revision from the DDIR.
    - i. DDIR makes the requested revision and resubmits to the FS.

---

*Continued on next page*

# Additional Design Services Request (ADSR), Continued

## Process Flow Diagram



# Modification Change Request (MCR)

---

## Overview

The three Change Management processes will be as follows: Modification Change Request (MCR), Additional Design Services Request (ADSR), and Change Order (CO). Any Change Request will be initiated through an MCR process. Based on the request, the owner will choose to reject the MCR or to proceed with the processing of the request. If the request requires additional design services, an ADSR would be initiated to obtain approval on the change to the design contract. If a request does not require additional design services, or immediately following the approval of the ADSR, an MCR would be initiated that if approved would result in a change to the GC's contract. For changes to the GC's contract, RM's will have the ability to "bundle" MCR's into one Change Order (CO). As part of the CO process initiation, all associated MCR's will be attached and the commitment will be approved automatically within e-Builder upon approval of the CO. Upon routing a CO for approval, all associated MCR's will already be reflected in the cost summary as pending commitment changes.

---

## Actors and View Permissions

The following project participants are involved in the process:  
**General Contractor (GC)** enters in cost and time impact of the MCR if none was known at the time of initiation and submits for approval by the owners.  
**Design Professional (DP)** reviews and verifies that the cost and time impact entered by the GC is correct.  
**Regional Manager (RM)** reviews the MCR for accuracy and distributes funding for the change accordingly.  
**District Representative (DR)** reviews the MCR for accuracy.  
**Central Coordinator (CenCo)** reviews the MCR for accuracy

Step Name	Actor(s)	Non-actor(s)
Start	GC, DP, DR, RM	All internal NMPSFA project participants
GC Review	GC	All internal NMPSFA project participants, District Representatives, Design Professional
DP Review	DP	All internal NMPSFA project participants, District Representatives, Design Professional
DR Review (No Cost/Time)	DR	All internal NMPSFA project participants, District Representatives, Design Professional
RM Funding	RM	All internal NMPSFA project participants, District Representatives, Design Professional
CenCo Review	CenCo	All internal NMPSFA project participants, District Representatives, Design Professional

*Continued on next page*

## Modification Change Request (MCR), Continued

---

- Process Details** The following steps are taken for each process instance:
1. The initiator enters the reason, solution, cost/time impact (if known) of the MCR:
    - a. The initiator submits the MCR process to the general contractor.
      - i. If the GC is the initiator, the next step still goes to the GC Review.
      - ii. Status changes to pending.
      - iii. Notifications are sent to the RM and DR.
  2. The DP receives the MCR and may:
    - a. Return to the GC for revision.
      - i. GC makes the requested revision and resubmits back to the DP.
    - b. May add scope to the MCR or see if there is a need for additional design.
    - c. At this time the DP would initiate an ADSR. See the ADSR requirements document.
    - d. Enter in DP additional cost (if any), changes in scope (if any), and owners estimate and submit to the DR.
  3. The DR reviews the MCR for relevancy and may:
    - a. Submit the MCR to the RM.
    - b. Return to the DP for revision.
      - i. DP makes requested revision and resubmits to the DR.
  4. The RM reviews the MCR for relevancy and may:
    - a. Return to the DP for revision.
      - i. DP makes the requested revision and resubmits back to the DR.
      - ii. The DR reviews the revisions and submits to the RM..

---

*Continued on next page*

## Modification Change Request (MCR), Continued

---

### Process Details (continued)

5. The RM reviews the MCR for relevancy and may:
  - a. Distribute funding accordingly
6. the CenCo reviews the MCR for relevancy and may:
  - a. Return to RM for revision.
    - i. RM makes the requested revision or sends back through the workflow for revisions and resubmits back to the CA
  - b. Proceed with modification
    - i. Process moves to a holding step in which MCR's will be held until approved through the Change Order process. Once the Change Order process is approved the associated MCR's will also be approved.(See Change Order requirements document for details)
      1. Process remains on hold in holding step
      2. Status changes to projected
  - c. Change Order is filled out to gather associated MCR's. (Follow Change Order process as outlined in the requirements for the CO process)
  - d. Reject the MCR and replace with an existing MCR.
    - i. Process finishes.
    - ii. Status changes to rejected.
  - e. Reject the MCR to stop work.
    - i. Process finishes.
    - ii. Status changes to rejected.

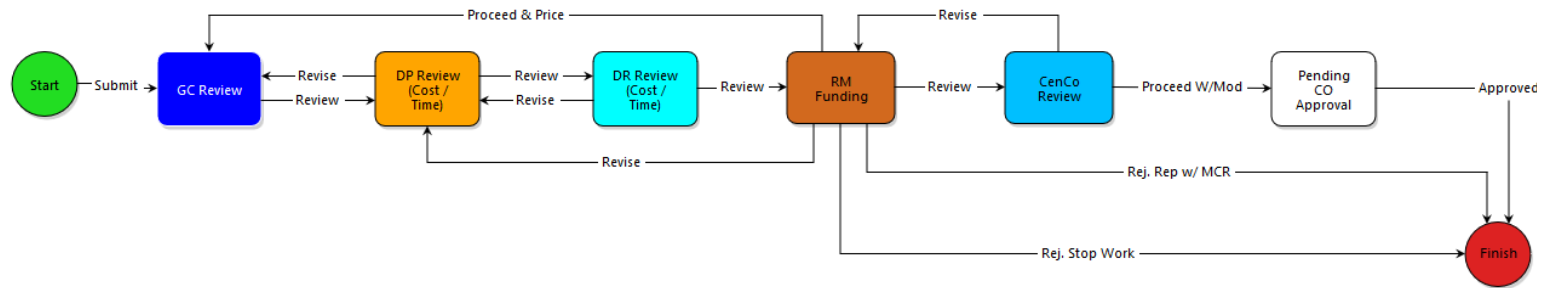
---

*Continued on next page*



## Modification Change Request (MCR), Continued

### Process Workflow



## Change Order (CO)

---

### Overview

The CO process allows visibility into the effects of a MCR on the project financials when the MCR is created, eventually serving the purpose of “bundling” MCR’s into one Change Order. Upon routing a CO process for approval, all associated MCR’s will already be reflected in the project’s cost summary.

---

### Actors and View Permissions

The following project participants are involved in the process:

**Design Professional (DP)** is responsible for bundling MCRs for Contractor Change Orders.

**General Contractor (GC)** confirms the proposed bundled MCRs are correct.

**District Representative (DR)** reviews the bundled change orders.

**Regional Manager (RM)** selects and reviews MCRs to bundle into change order.

**Contract Administrator (CA)** reviews the change order backup provided by the RM and the DR and confirms the proposed funding distribution is appropriate.

**Deputy Director (DDIR)** confirms the change order backup and funding distribution provided by the RM and the DR is appropriate.

**Financial Specialist (FS)** is responsible for updating the commitment in the State financial system.

Step Name	Actor(s)	Non-actor(s)
Start, DP Revise	DP, RM	All internal NMPSFA project participants, DR
GC Review	GC	All internal NMPSFA project participants; all process participants, DR
DP Revise	DP	All internal NMPSFA project participants; all process participants, DR
DR Review	DR	All internal NMPSFA project participants; all process participants
RM Review	RM	All internal NMPSFA project participants; all process participants, DR
CA Review	CA	All internal NMPSFA project participants; all process participants, DR
DDIR Review	DDIR	All internal NMPSFA project participants; all process participants, DR
FS Update	FS	All internal NMPSFA project participants; all process participants, DR

*Continued on next page*

## Change Order (CO), Continued

---

### Process Details

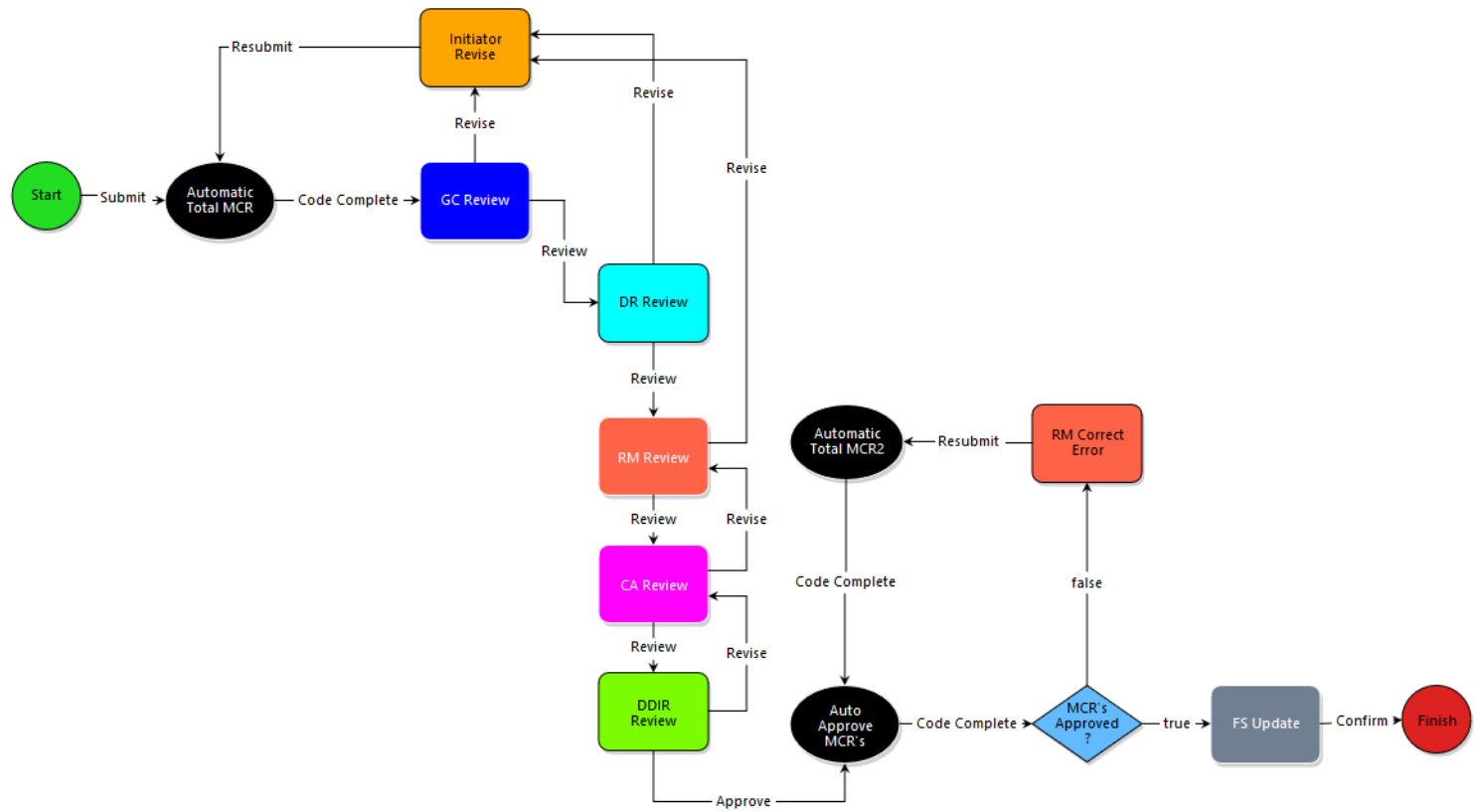
1. The DP initiates the Change Order Process:
  - a. The DP attaches the MCRs to be combined in the change order and submits to the GC for review.
2. The GC reviews the proposed Change Order:
  - a. The GC submits the Change Order for approval by the DR.
  - b. The GC requests a revision from the DP.
    - i. The DP receives the request for a revision and resubmits the proposed Change Order.
3. The DR reviews proposed Change Order:
  - a. The DR submits the Change Order for approval by the RM.
  - b. The DR requests a revision from the DP.
    - i. The DP receives the request for a revision and resubmits the proposed Change Order.
4. The RM reviews proposed Change Order:
  - a. The RM submits the Change Order for approval by the CA.
  - b. The RM requests a revision from the DP.
    - i. The DP receives the request for a revision and resubmits the proposed Change Order.
5. The CA reviews proposed Change Order:
  - a. The CA submits the Change Order for approval by the DDIR.
  - b. The CA requests a revision from the RM.
6. The DDIR reviews proposed Change Order:
  - a. Process enters a Code Step that is automatically performed by the e-Builder system to approve all associated MCRs.
    - i. If the Code Step results in an error, the process proceeds to the RM with an error message
      1. RM corrects the error and resubmits the process to re-enter the Code Step
    - ii. If the Code Step successfully approves the associated MCRs, the process will proceed to the FS
  - b. The CA requests a revision from the RM.
7. The FS reviews the approved Change Order:
  - a. The FS updates State financial system.
    - i. The process finishes.

---

*Continued on next page*

# Change Order (CO), Continued

**Process Flow Diagram**



# GC Pay Application (PAY APP)

---

## Overview

The Pay application process is used by the General Contractor assigned to a PSFA funded project to invoice for progress payments on a monthly basis. e-Builder will generate one consistent owner approved pay application as part of the output from the pay application approval. Finally, the District Representative, the Regional Manager, the vendor and the CFO will now have complete visibility into the process throughout the invoice's life cycle.

---

## Actors and View Permissions

The following project participants are involved in the process:

**General Contractor (GC)** starts the process instance. GC is the only role that can initiate the SOV process. The GC also confirms the imported commitment line item values.

**Design Professional (DP)** is responsible for reviewing the SOV in excel form.

**District Representative (DR)** reviews the SOV in excel form.

**Regional Manager (RM)** reviews the SOV in excel form and executes the SOV import after approval.

**Financial Specialist (FS)** is responsible for initiating and documenting the payment process once the application process has been reviewed and approved by the Design Professional.

**District Financial Specialist (DFS)** is responsible for initiating and documenting the payment process once the application process has been reviewed and approved by the Design Professional on behalf of the District.

Step Name	Actor(s)	Non-actor(s)
Start	GC	All PSFA Internal Project Participants and DP, DR
GC Revise	GC	All PSFA Internal Project Participants and DP, DR
DP Review	DP	All PSFA Internal Project Participants and GC, DR
DR Review	DR	All PSFA Internal Project Participants and GC, DR
RM Review	RM	All PSFA Internal Project Participants and GC, DR
FS Process	FS	All PSFA Internal Project Participants and GC, DP, DR

*Continued on next page*

## GC Pay Application (PAY APP), Continued

---

### Actors and View Permissions (continued)

Step Name	Actor(s)	Non-actor(s)
DFS Process	DFS	All PSFA Internal Project Participants and GC, DP, FS
FS Update	FS	All PSFA Internal Project Participants and GC, DP, FS
Finish	None	All PSFA Internal Project Participants and DR, DP, GC

---

### Process Details

The following steps are taken for each process instance:

1. GC initiates the Pay Application Process:
  - a. GC selects commitment from list of available commitments for their company.
  - b. GC enters line items value for the current period including amounts for stored materials.
  - c. GC submits the pay application to the DP for approval.
2. DP receives the Pay Application:
  - a. DP reviews the pay application.
  - b. DP certifies the application and submits to the DR for review
  - c. DP requests GC to revise the pay application.
    - i. GC revises the pay application and re-submits to the DP.
3. DR receives the Pay Application:
  - a. DR reviews and approves the pay application and submits to the RM for review.
  - b. DR requests DP to revise the pay application.
    - i. DP revises the pay application and re-submits to the DR.
4. RM receives the Pay Application:
  - a. RM reviews and approves the pay application and submits to the DR, FS, or both depending on the funding distribution.
  - b. RM requests DP to revise the pay application.
    - i. DP revises the pay application and re-submits to the DR

---

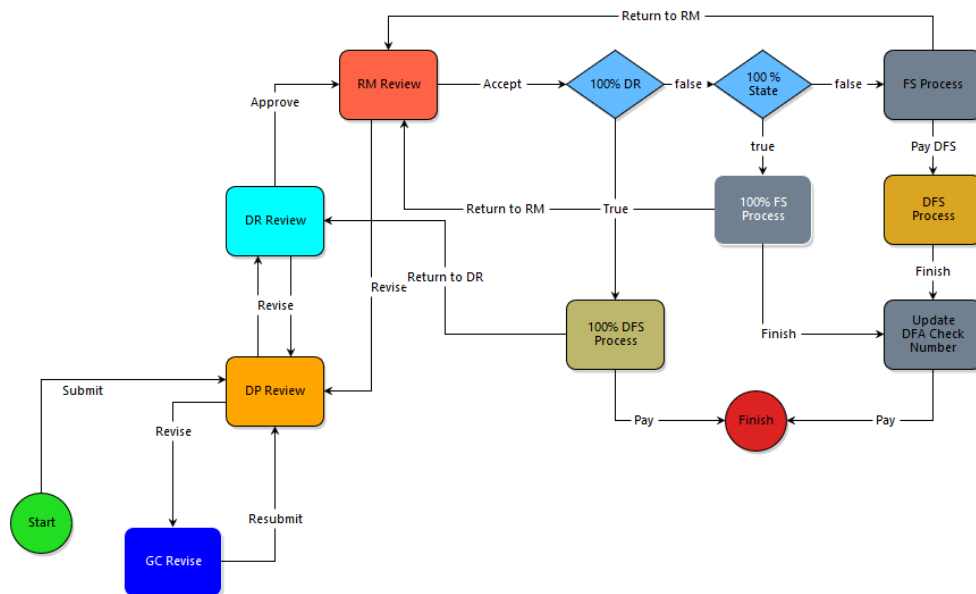
*Continued on next page*

# GC Pay Application (PAY APP), Continued

## Process Details (continued)

5. If pay application is 100% District Funded, DFS receives the pay application:
  - a. DFS processes GC payment.
  - b. THE PROCESS ENDS.
6. If pay application is 100% PSFA Funded, FS receives the pay application:
  - a. FS processes GC payment.
    - i. FS prints custom pay application hard copy for signature.
    - b. THE PROCESS ENDS.
7. If pay application is jointly Funded, FS and DFS receives the pay application:
  - a. FS processes GC partial payment.
    - i. FS prints custom pay application hard copy for signature.
    - ii.
  - b. DFS processes GC partial payment.
8. FS updates DFA Check Number
  - a. THE PROCESS ENDS.

## Process Workflow



# Vendor Invoice (VI)

---

**Overview**

The Vendor Invoice process is used by Vendors who render goods and services to a PSFA funded project to bill for progress payments. By managing the Vendor Invoice Process within the e-Builder system, PSFA will be able to draw down the appropriate funding sources based upon the funding distributions associated with the commitment.

---

**Actors and View Permissions**

The following project participants are involved in the process:  
**Initiator** will start the process. The initiator on the process can be the DR, RM.  
**Regional Manager (RM)** reviews the vendor invoice.  
**District Representative (DR)** reviews the vendor invoice.  
**PSFA Financial Specialist (FS)** is responsible for recording the state invoice amount and issuing payment.  
**District Financial Specialist (DFS)** is responsible for recording the district invoice amount and issuing payment.

Step Name	Actor(s)	Non-actor(s)
Initiator, Initiator Revise	DR, RM	All Internal PSFA Project Participants and DR
RM Review	RM	All Internal PSFA Project Participants and DR
DR Review	DR	All Internal PSFA Project Participants and DR
RM Funding	RM	All Internal PSFA Project Participants and DR
FS Payment	FS	All Internal PSFA Project Participants and DR
DFS Payment	DFS	All Internal PSFA Project Participants and DR
Update DFA Check Number	FS	All Internal PSFA Project Participants and DR
Finish	None	All Internal PSFA Project Participants and DR

*Continued on next page*



## Vendor Invoice (VI), Continued

---

**Process Details** The following steps are taken for each process instance:

1. Initiator starts the Vendor Invoice process:
  - a. Initiator indicates if they are a DR or a RM and submits the vendor invoice for review.
    - i. If the Initiator is a RM go to STEP 2.
    - ii. If the Initiator is a DR go to STEP 3.
    - iii. Status changes to pending.
2. DR reviews the vendor invoice:
  - a. DR submits the vendor invoice to the RM funding distribution step.
  - b. DR requests a revision from the initiator.
3. RM reviews the vendor invoice:
  - a. RM distributes funding and submits the invoice to the FS and DR for Payment.
    - i. If 100% State, the process moves to the FS Payment step.
    - ii. If 100% District, the process moves to the DFS Payment step.
    - iii. If the payment is split, the process moves to the FS & DFS Payment step.
    - iv. Status changes to approved.
  - b. RM requests a revision from the Initiator.
    - i. The Initiator makes the requested revision.
  - c. RM requests a review from the DR.
  - d. RM rejects the invoice.
    - i. The process finishes.
    - ii. Status Changes to Rejected.

---

*Continued on next page*

## Vendor Invoice (VI), Continued

---

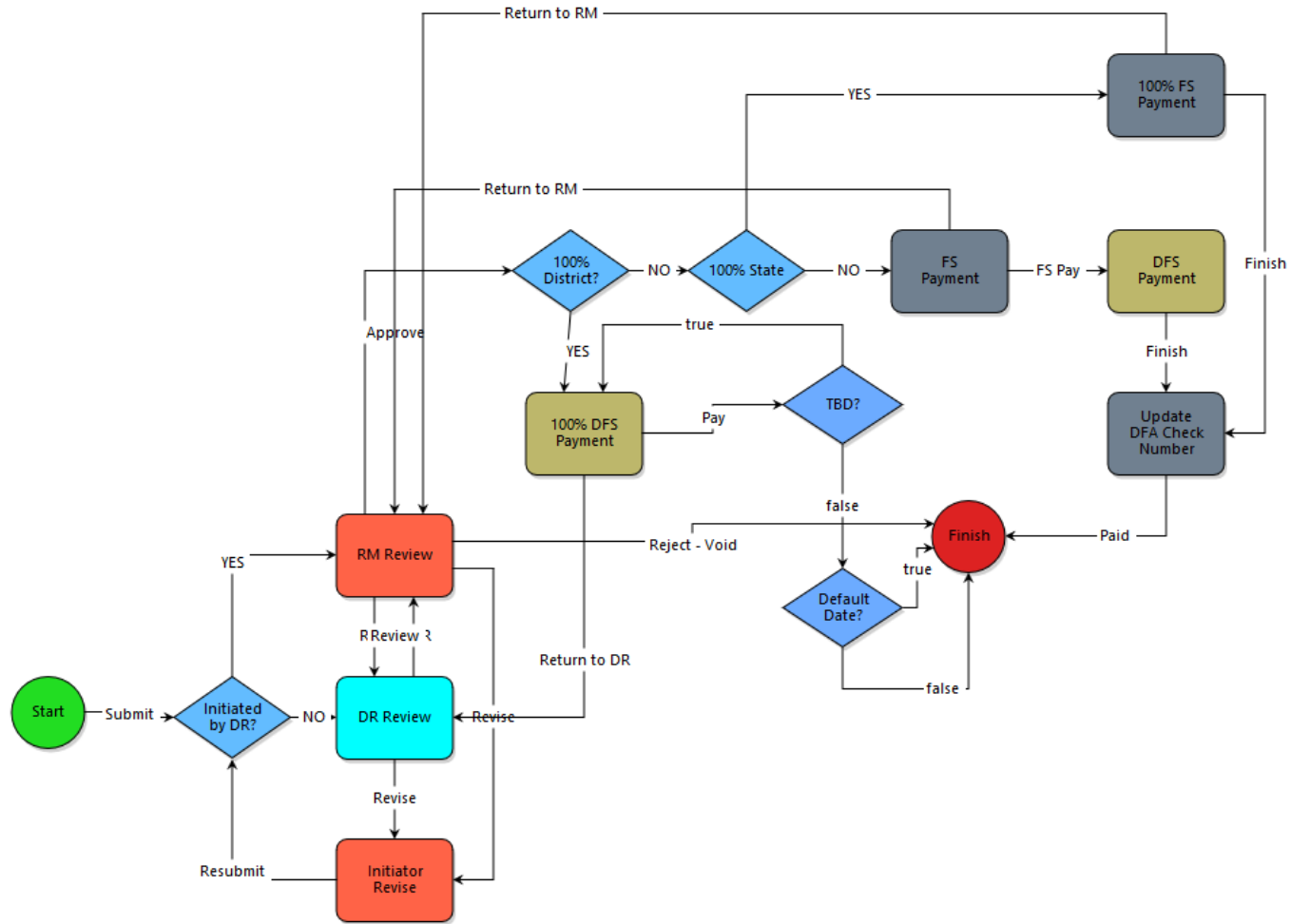
- Process Details**  
(continued)
4. FS reviews the approved invoice and submits to DFA
  5. DFS reviews the approved invoice:
    - a. DFS enters check number and date issued.
  6. FS updates DFA Check Number
    - a. The process finishes.
    - b. Status changes to paid.

---

*Continued on next page*

# Vendor Invoice (VI), Continued

## Process Workflow



# Substantial Completion (SC)

---

## Overview

This section defines the requirements of the Substantial Completion business process to be configured within the e-Builder system.

---

## Actors

The following project participants are involved in the process:

- **General Contractor (GC)** will be the initiator on this process.
- **Design Professional (DP)** reviews and approves the substantial completion documents.
- **District Representative (DR)** reviews the substantial completion documents.
- **Regional Manager (RM)** reviews the substantial completion documents.
- **Central Coordinator (CenCo)** reviews the substantial completion documents.

Step Name	Actor(s)	Non-actor(s)
Start	GC	All Project Participants
DP Review	DP	All Project Participants
GC Revise	GC	All Project Participants
DR Review	DR	All Project Participants
RM Review	RM	All Project Participants
DP Approve	DP	All Project Participants
Finish	None	All Project Participants

*Continued on next page*

## Substantial Completion (SC), Continued

---

### Process Details

The following steps are taken for each process instance:

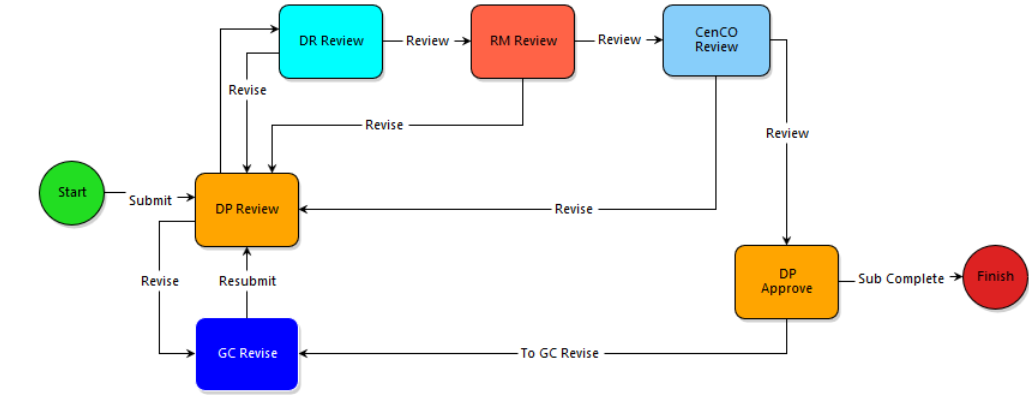
1. The GC will upload substantial completion documents:
  - a. The GC submits the substantial completion process to the DP.
    - i. Status changes to pending.
2. The DP reviews the substantial completion documents and may:
  - a. Return to the GC for clarification.
    - i. GC makes the requested clarification and resubmits to the DP.
  - b. Submit the substantial completion process to the DR.
3. The DR reviews the substantial completion process and may:
  - a. Return to the DP for clarification.
    - i. DP makes the requested clarification and resubmits to the DR.
  - b. Submit the substantial completion process to the RM.
4. The RM reviews the substantial completion process and may:
  - a. Return to the DP for clarification.
    - i. DP makes the requested clarification and resubmits to the DR.
  - b. Submit the substantial completion process to the CenCo for review.
5. The CenCo reviews the substantial completion process and may:
  - a. Return to the DP for clarification.
    - i. DP makes the requested clarification and resubmits to the DR.
  - b. Submit the substantial completion process to the DP for final approval.
6. The DP reviews the substantial completion process and will:
  - a. Approve the substantial completion process.
    - i. Process finishes.
    - ii. Status changes to approve.
    - iii. Notifications are sent to the RM, DR, GC, FC, Maintenance and P&D Manager.

---

*Continued on next page*

# Substantial Completion (SC), Continued

## Process Flow Diagram



## Document Closeout (DC)

---

### Overview

PSFA's project closeout process is a series of seven steps in which PSFA and local school districts review and approve closeout documentation and final payment to the general contractor and design professional.

---

### Actors and View Permissions

The following project participants are involved in the client process:  
**General Contractor (GC)** will be the initiator on this process.  
**Design Professional (DP)** reviews and approves the documents for closeout.  
**District Representative (DR)** reviews the documents for closeout.  
**Regional Manager (RM)** reviews the documents for closeout.

Step Name	Actor(s)	Non-actor(s)
Start	GC	All Internal PSFA Project Participants, District Representatives
DP Review	DP	All Internal PSFA Project Participants, District Representatives
GC Revise	GC	All Internal PSFA Project Participants, District Representatives
DR Review	DR	All Internal PSFA Project Participants, District Representatives
RM Review	RM	All Internal PSFA Project Participants, District Representatives
DP Approve	DP	All Internal PSFA Project Participants, District Representatives
Finish	None	All Internal PSFA Project Participants, District Representatives

---

### Process Details

The following steps are taken for each process instance:

1. The GC will upload closeout documentation:
  - a. The GC submits the document closeout process to the DP.
    - i. Status changes to pending.
2. The DP reviews the closeout documentation and may:
  - a. Return to the GC for clarification.
    - i. GC makes requested clarification and resubmits back to the DP.
  - b. Submit the document closeout process to the DR.

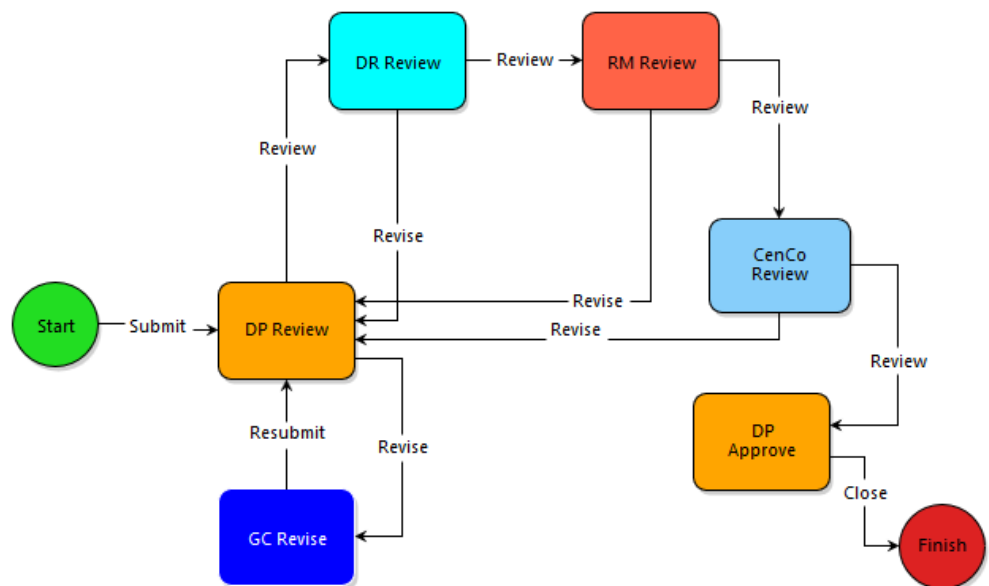
*Continued on next page*

---

## Document Closeout (DC), Continued

- Process Details** (continued)
3. The DR reviews the closeout documentation and may:
    - a. Return to the DP for clarification.
      - i. DP makes requested clarification and resubmits back to the DR.
    - b. Submit the document closeout process to the RM.
  4. The RM reviews the closeout documents and may:
    - a. Return to the DP for clarification.
      - i. DP makes requested clarification and resubmits back to the DR.
    - b. Submit the document closeout process to the DP for final approval.
  5. The DP reviews the closeout documentation and will:
    - a. Approve the document closeout process.
      - i. Process finishes.
      - ii. Status changes to approve.
      - iii. Notifications are sent to the RM, DR, GC, SFMA, and P&D Manager.

### Process Workflow





# 11 Month Correction (11MC)

---

## Overview

PSFA’s project closeout process is a series of seven steps in which PSFA and local school districts review and approve closeout documentation and final payment to the general contractor and design professional. Any project participant will have access to see the status at any point in time for the correction of warranty items by the general contractor on the project. This gives the project team central access to critical documents for the approval and acceptance of 11 month correction.

---

## Actors and View Permissions

The following project participants are involved in the client process:  
**Design Professional (DP)** initiates and approves the 11 month correction process.  
**General Contractor (GC)** reviews the 11 month correction process.

Step Name	Actor(s)	Non-actor(s)
Start	DP	All Project Participants
GC Review	GC	All Project Participants
DP Revise	DP	All Project Participants
DP Approve	DP	All Project Participants
Finish	None	All Project Participants

---

*Continued on next page*

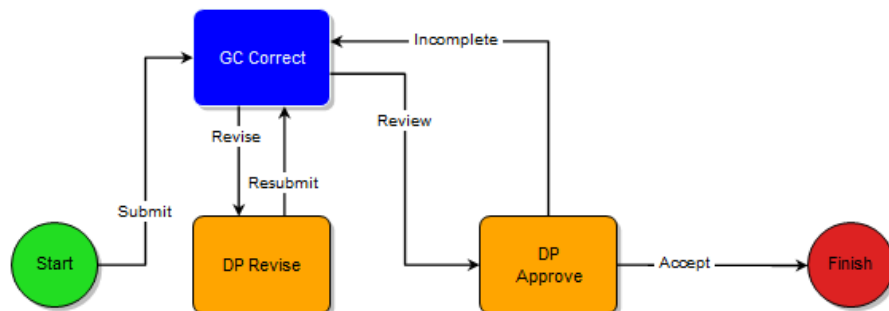
## 11 Month Correction (11MC), Continued

---

- Process Details** The following steps are taken for each process instance:
1. The DP will upload the 11 month correction period list (**includes incomplete FIMS list and A/E walkthrough List**) and the Inspection date:
    - a. The DP submits the 11 month correction process to the GC.
      - i. Status changes to pending.
      - ii. Notifications are sent to the DR and the RM.
  2. The GC reviews the 11 month correction list and may:
    - a. Return to the DP for clarification.
      - i. DP makes the requested clarification and resubmits to the GC.
    - b. Submit the 11 month correction process to the DP.
  3. The DP reviews the anticipated completion date set by the GC and may:
    - a. Return to the GC for clarification.
      - i. GC makes the requested clarification and resubmits to the DP.
    - b. Accept the 11 month correction process after work has been completed.
      - i. Process Finishes.
      - ii. Status changes to approve.
      - iii. Notifications are sent to the Field Auditor, DR, and RM.

---

### Process Workflow



# Ed Spec Review (ESR)

---

## Overview

The Ed Spec Review processes will be used to route the relevant documents contained in the plans electronically which will allow any project participant to view the plans throughout the lifespan of the associated projects. Throughout the routing of plans, the relevant project participants will automatically be notified as the Plan Review moves through the process and is approved.

---

## Actors and View Permissions

The following project participants are involved in the client process:  
**Ed Spec Planner** starts the process instance. The Ed Spec Planner is the only role that can initiate the Ed Spec Review process.  
**PSFA Master Planner** reviews and approves the Ed Spec Plan.  
**Planning & Design Manager** reviews the Ed Spec Plan.

Step Name	Actor(s)	Non-actor(s)
Start	Ed Spec Planner	All internal NMPSFA project participants, District Representative
PSFA Master Planner	PSFA Master Planner	All internal NMPSFA project participants, District Representative
Ed Spec Planner Revise	Ed Spec Planner	All internal NMPSFA project participants, District Representative
P & D Manager	P & D Manager	All internal NMPSFA project participants, District Representative
Finish	None	All internal NMPSFA project participants, District Representative

---

## Process Details

The following steps are taken for each process instance:

1. The Ed Spec Planner will upload the Ed Spec Plan file and will:
  - a. Submit the Ed Spec Plan to the PSFA Master Planner for review.
    - i. The DR, RM, and SFM will receive notification that the Ed Spec Plan has been submitted.
    - ii. Status changes to pending.
2. The PSFA Master Planner will review the Ed Spec Plan and may:
  - a. Return the Ed Spec Plan to the Ed Spec Planner for revision.
    - i. Upon revision the RM and DR will receive a notification.
    - ii. Upon resubmission to the PSFA Master Planner the RM will receive a notification.
  - b. Submit the Ed Spec Plan to the P & D Manager for review.

---

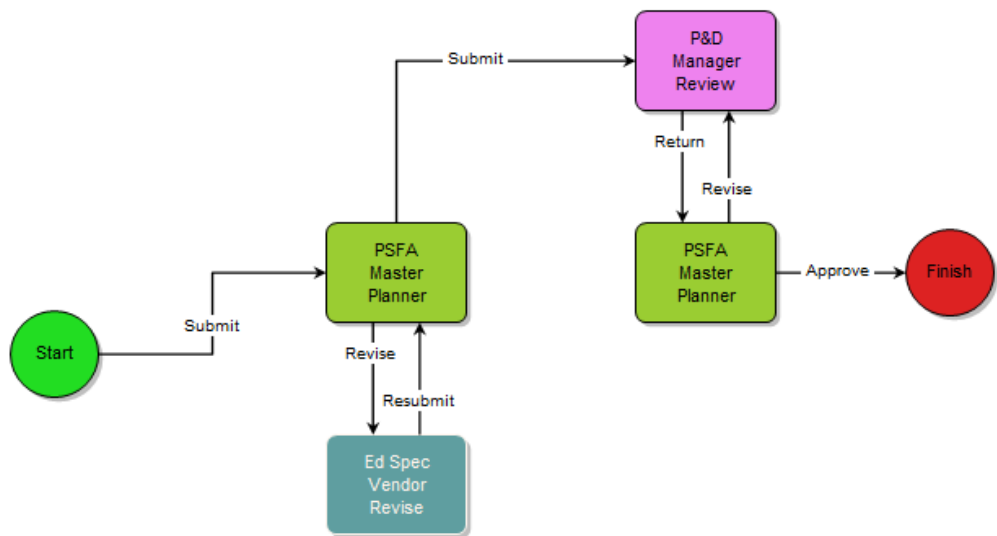
*Continued on next page*

## Ed Spec Review (ESR), Continued

---

- Process Details**  
(continued)
3. The P & D Manager will review the Ed Spec Plan and may:
    - a. Return the Ed Spec Plan to the PSFA Master Planner for revision.
    - b. Submit back to the PSFA Planner for final approval.
  4. The PSFA Master Planner will review the Ed Spec Plan and will:
    - a. Approve the Ed Spec Plan entered by the Ed Spec Planner.
      - i. Print the Ed Spec Approval Letter (mail merge) and send it to the District Representative.
      - ii. The Ed Spec Planner, DR, RM, SFM, and IT Admin will receive a notification that the Ed Spec Plan has been approved.
      - iii. The IT Administrator will post the approved Ed Spec Plan to the web.
      - iv. Process Finishes.
      - v. Status changes to approved.
- 

### Process Workflow



# Facility Master Plan (FMP) Review

---

**Overview** The Facility Master Plan (FMP) Review process is used to route the relevant documents contained in the plans electronically. Throughout the routing of plans, the relevant project participants will automatically be notified as the plan review moves through the process and is approved.

---

**Actors** The following project participants are involved in the process:  
**FMP Vendor** starts the process instance. FMP vendor is the only role that can initiate the FMP Review process, loads the FMP File along with any comments.  
**PSFA Master Planner** reviews and approves the FMP.  
**Planning & Design Manager** acknowledges the review and approval of the FMP.

---

**Step View Permissions** The following are the process steps and actors:

Step Name	Actor(s)	Non-actor(s)
Start	FMP Vendor	All internal NMPSFA project participants, District Representative
PSFA Master Planner	PSFA Master Planner	All internal NMPSFA project participants, District Representative
FMP Vendor Revise	FMP Vendor	All internal NMPSFA project participants, District Representative
P & D Manager Review	P & D Manager	All internal NMPSFA project participants, District Representative
Finish	None	All internal NMPSFA project participants, District Representative

---

**Process Details** The following steps are taken for each process instance:

1. The FMP Vendor will upload the FMP file and will:
  - a. Submit the FMP to the PSFA Master Planner for review.
    - i. The DR and RM will receive notification that the FMP has been submitted.

---

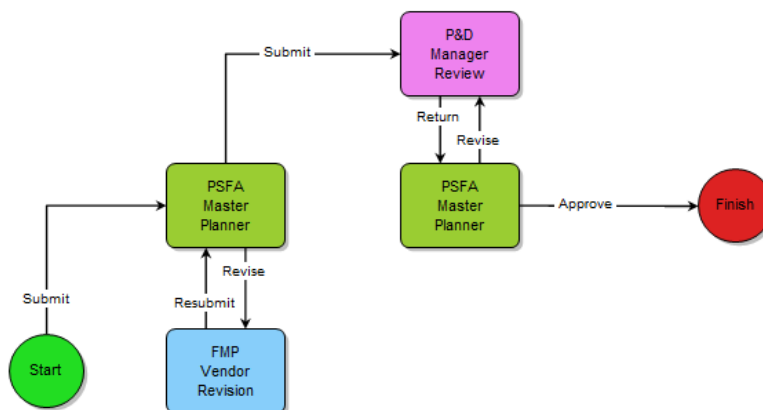
*Continued on next page*

## Facility Master Plan (FMP) Review, Continued

---

- Process Details**  
(continued)
2. The PSFA Master Planner will review the FMP and may:
    - a. Send to the P&D Manager for review.
      - i. Skip to step (3) below.
    - b. Approve the FMP entered by the FMP Vendor.
      - i. Print the FMP approval letter (mail merge) and send to the district superintendent.
      - ii. The P&D Manager, FMP Vendor, DR, RM, and IT Administrator will receive notification that the FMP has been approved.
      - iii. The IT Administrator will post approved FMP to the web.
      - iv. Process Finishes.
      - v. Status changes to approved.
    - c. Return the FMP to the FMP Vendor for Revision.
      - i. The Master Planner will attach the checklist via the attachments tab for FMP Vendor Revision.
      - ii. Upon Revision and resubmission to the PSFA Master Planner the DR and RM will receive notification.
  3. The P&D Manager will review the FMP and will:
    - a. Return the FMP to the PSFA Master Planner with remarks.
      - i. Return to Step (2a) above.
      - ii. Status changes to pending.
- 

### Process Workflow



# Request for Approval of School Construction (Non-PSCOC) (RASC Non-PSCOC)

---

## Overview

RASC Non-PSCOC Plan Review processes in e-Builder will be used to route the relevant documents contained in the plans electronically. Throughout the routing of plans, the relevant project participants will automatically be notified as the Plan Review moves through the process and is approved.

---

## Actors and View Permissions

The following project participants are involved in the client process:  
**Initiator** starts the process instance. The Design Professional is the only role that can initiate the RASC (Non-PSCOC).  
**District Representative (DR)** reviews all RASC (Non-PSCOC) Processes.  
**Planning Admin (PA)** reviews all RASC (Non-PSCOC) Processes.  
**Facilities Specialist (FS)** reviews all RASC (Non-PSCOC) Processes.  
**Planning & Design Manager (PDM)** reviews all RASC (Non-PSCOC) Processes.

Step Name	Actor(s)	Non-actor(s)
Start	Design Professional	All internal NMPSFA project participants, District Representative
DP Revise	Design Professional	All internal NMPSFA project participants
DR Review	District Representative	All internal NMPSFA project participants
PA Review	Planning Admin	All internal NMPSFA project participants
FS Review	Facilities Specialist	All internal NMPSFA project participants
FS Documents	Facilities Specialist	All internal NMPSFA project participants
P&D Manager Review	Planning & Design Manager	All internal NMPSFA project participants
PA Enter Permit Information	Planning Admin	All internal NMPSFA project participants
Finish	None	All internal NMPSFA project participants

*Continued on next page*

# Request for Approval of School Construction (Non-PSCOC) (RASC Non-PSCOC), Continued

---

- Process Details** The following steps are taken for each process instance:
1. The Design Professional enters the RASC (Non-PSCOC) details and may:
    - a. Submit the process.
      - i. Process proceeds to the Planning Admin for review.
      - ii. Status changes to Pending.
      - iii. District Representative receives notification
  2. Planning Admin receives the process and may:
    - a. Return the process to the Design Professional for revision.
      - i. DP revises the process and resubmits to the PA.
    - b. Review the process.
      - i. Process proceeds to the Facilities Specialist.
  3. The Design Professional enters the RASC (Non-PSCOC) details and may:
    - a. Submit the process.
      - i. Process proceeds to the Planning Admin for review.
      - ii. Status changes to Pending.
      - iii. District Representative receives notification
  4. Planning Admin receives the process and may:
    - a. Return the process to the Design Professional for revision.
      - i. DP revises the process and resubmits to the PA.
    - b. Review the process.
      - i. Process proceeds to the Facilities Specialist.
  5. Facilities Specialist receives the process and may:
    - a. Request a comment from PED.
    - b. Return the process to the DP for revision.
      - i. DP revises the process and resubmits to the FS.
    - c. Review the process.
      - i. Process proceeds to a new step for the Facilities Specialist to send the RASC to CID, PED, and SFMO. (Step 6)
  6. Facilities Specialist receives the process and may:
    - a. Send the RASC to CID, PED, and SFMO for review. (outside of e-Builder)
      - i. FS will enter the date sent and date returned for the CID, PED, and SFMO.
    - b. Review the process.
      - i. Process proceeds to the Planning & Design Manager.

---

*Continued on next page*

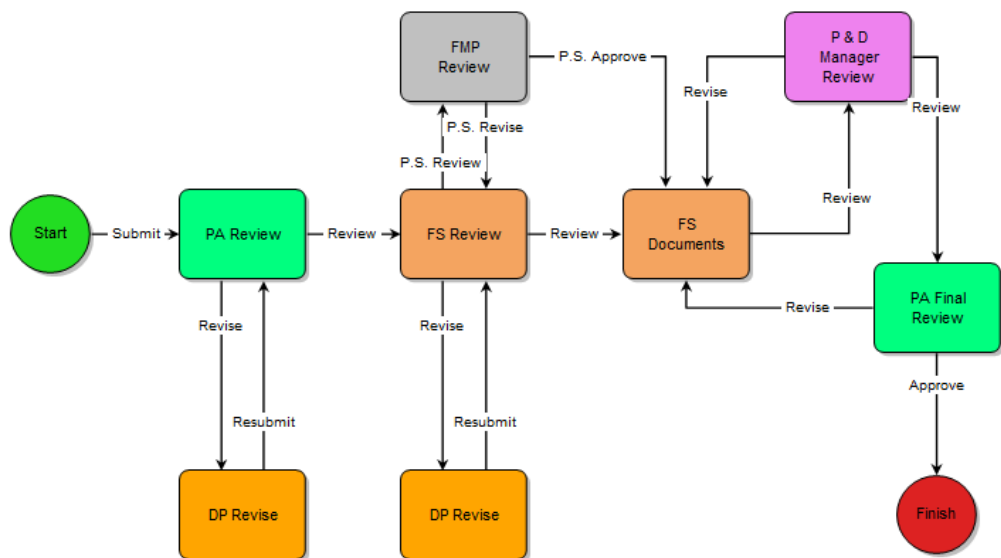


# Request for Approval of School Construction (Non-PSCOC) (RASC Non-PSCOC), Continued

**Process Details**  
(continued)

7. Planning & Design Manager receives the process and may:
  - a. Return the process to the FS for revision.
    - i. FS revises the process and resubmits to the P&D Manager.
  - b. Review the process.
    - i. Process proceeds to the Planning Admin.
8. Planning Admin receives the process and may:
  - a. Print a hard copy mail merge of the RASC Award Document, attach a hard copy of the SFMO acceptance letter, and send to the District. (outside of e-Builder)
  - b. Return the process to the FS for revision.
    - i. FS revises the process and resubmits to the Planning Admin.
  - c. Approve the process.
    - i. Process finishes.
    - ii. Status changes to Approved.
    - iii. The Regional Manager, District Representative, and Design Professional will receive notification that the RASC has been approved.

**Process Workflow**



# Reports and Dashboards

## Overview

---

### Introduction

e-Builder has the capability to extract project data for analysis, through custom reports and summaries or by displaying the data in a dashboard.

---

## Reports Module

---

### Overview

The e-Builder Reports module allows you to view reports on all aspects of your projects in e-Builder. Reports are lists, summaries, and analyses of your data, which you can display or print. The module enables any e-Builder user to easily report on real time, up-to-date information recorded in any of the e-Builder modules that users have access to.

Click on the Reports tab. To view the contents of a single folder, click on the drop-down list in the middle of the screen and select the name of the desired folder. You can also access other report folders by scrolling down the screen.



*Continued on next page*

## Reports Module, Continued

---

### Creating a New Report

Users can create their own reports by using the Report Wizard, which is a series of screens that walks you through creating a customized report that displays the only information you need. As you complete each step, you click Next; you can click the Previous button to go back to the previous step or use the 'Jump to step' drop-down menu to skip steps.

Step	Action
1.	Click on the Reports tab at the top of the screen.
2.	Click on the Add New Report button. You will be directed to the Report wizard.
3.	In Step 1, click the drop-down menu and select the type of data that will be used to run the report, Click the Next button.
4.	In Step 2, click on the radio button for the type of report you wish to run. Click Next.
5.	In Step 3, select the columns to be included in the report by placing a check mark next to the column name. Click Next.
6.	In Step 4, select the aggregate functions to be included in the report. Click Next.
7.	In Step 5, choose the ordering of the columns by using the Top, Up, Down, and Bottom buttons.
8.	If you have chosen a summary or matrix report, select grouping in Step 6 and click Next. For Tabular Reports, Step 6 will be to specify criteria for the report (this is the final step for Tabular Reports).
9.	In Step 7, specify filter criteria for the report.
10.	Click Save As and enter a name and description for your report.
11.	Click Save.

---

### Exporting a Report

To export a report, do the following steps:

Step	Action
1.	Click on the Reports tab at the top of the screen.
2.	Click Export next to the name of a report.
3.	Select the output type, and click Export or Cancel.
4.	Select Open to view in MS Excel or Save to save the file onto your computer.

---

*Continued on next page*

## Reports Module, Continued

---

### Editing an Existing Report

To edit an existing report, do the following steps:

Step	Action
1.	Click on the Reports tab at the top of the screen.
2.	Click on Edit next to the name of the report.
3.	Modify any aspect of the report within the Report Wizard.
4.	Click the Save button and rename the report, if necessary.
5.	Click Save.

---

### Running Reports

To run a report, do the following steps:

Step	Action
1.	Click on the reports tab at the top of the screen.
2.	Click on the name of the report that you wish to run. The results of the report will be displayed on the screen.

---

## Dashboards Module

---

### Overview

Dashboards are graphical representation of reports that present summary data in a visual format. They are typically used to provide overviews of program or project status and metrics. Dashboards are dependent on the information contained within the reports.

---

### Creating a Dashboard

To create a dashboard, follow these steps:

Step	Action
1.	Go to Dashboards tab.
2.	Select the Go To Dashboard List link (to the right of View Dashboard).
3.	Click the Add Dashboard button.
4.	Type a Title Name for the dashboard.
5.	Select the Layout Style: Two or Three columns.

---

*Continued on next page*

## Dashboards Module, Continued

---

### Creating a Dashboard (continued)

Step	Action
6.	Set up Dashboard permissions.
7.	For each column, select the Size.
8.	Select the folder to store the dashboard in.
9.	Click the Save button.

---

### Adding Dashboard Items

Once you have created your Dashboard, you have to add items to it. Dashboard items are the individual graphs that summarize the data. To add dashboard items, follow these steps:

Step	Action
1.	Select the name of the Dashboard.
2.	Click the Edit link, if it exists. If no items exists:
3.	Select the link 'Click here to configure this dashboard.
4.	Add the Dashboard item.
5.	Click the Add Dashboard Item for the column in which the dashboard should be displayed.
6.	Select a Component Type: Chart, Table, Metric, Gauge.
7.	Select a Report.
8.	Depending on the component type, additional fields may be required which will be highlighted in red.
9.	Click the Save button.

---

Note: Dashboards are based on summary and matrix reports. The values are determined by groupings.

# Acronyms List

## Overview

---

**Commonly Used Acronyms** The following are PSFA’s commonly used acronyms that are used in e-Builder.

11MC	11 Month Correction
ADSR	Additional Design Services Request
ASI	Architect's Supplemental Instructions
BC	Budget Change
CA	Contract Administrator
CFO	Chief Financial Officer
CID	Construction Industries Division
CIMS	Construction Information Management System
CMAR	Construction Manager at Risk
CO	Change Order, or Certificate of Occupancy
DC	Document Closeout
DCP	Deficiencies Correction Program
DD	Design Development
DDIR	PSFA Deputy Director
DFS	District Financial Specialist
DSA	District Staff Architect
DISTRICT	School Districts, Local or State-Chartered Charter Schools
DP	Design Professional
DR	District Representative
PO	Purchase Order
ED SPEC	Educational Specifications
ESR	Ed Spec Review
FC	Field Coordinator
FMP	Facilities Master Plan
FS	Financial Specialist or Facilities Specialist
GC	General Contractor
GRT	Gross Receipts Tax
HVAC	Heating, Ventilation & Air Conditioning Systems

ITB or IFB	Invitation to Bid, or Invitation for Bid
MACC	Maximum Allowable Construction Cost
MCR	Modification Change Request
MOU	Memorandum of Understanding
O&M	Operations & Maintenance
ODR	Owner Design Review
P&D	Planning and Design
PA	Planning Admin
PAC	Performance Assurance Contractor
PAYAP	Pay Application
PED	Public Education Department
POE	Post Occupancy Evaluation
PSA	Professional Services Agreement
PSCOC	Public School Capital Outlay Council
RASC	Request for Approval of School Construction (PSCOC)
RASC Non-PSCOC	Request for Approval of School Construction (Non PSCOC)
RC	Roof Consultant
RFI	Request for Interpretation or Information
RFP	Request for Proposal
RFQ	Request for Qualifications
RM	PSFA Regional Manager
SFM	PSFA Senior Facilities Manager
SFMO	State Fire Marshal's Office
SC	Substantial Completion
SOV	Schedule of Values