Table of Contents

- Submitting a PAR
- Approving a PAR
  - Project Manager’s Director
  - Architecture Design & Construction Associate Vice President
  - Capital Project Finance Director
  - University Planning Associate Vice President
  - Facilities Management & Safety Associate Vice President
  - Foundation Chief Finance & Investment Officer
  - Treasury Management Director
  - Client Point of Contact
  - Client Chief Financial Administrative Officer
  - Client Dean
  - Chief of Staff
- Revising a PAR
- CF&PC Approval
- BoT Approval
- PAR Acceptance
Overview

- The project approval process helps campus leadership prioritize improvements and manage the entire campus comprehensively.
  - The Project Manager will work with the necessary individuals within the project team to develop the Project Authorization Request for approval
Roles

- Project Manager
- Architecture Design & Construction Administrative Support Specialist
- Architecture Design & Construction AVP
- Facilities Management & Safety AVP
- Capital Project Finance Director
- University Planning AVP
- Architecture Design & Construction Directors
- Treasury (if applicable)
- Foundation (if applicable)
- Client Point of Contact
- Client CFAQ
- Client Dean
- Chief of Staff
Step 01 – Fill Out the Project Authorization Request

- Before completing a Project Authorization Request please ensure your Project Coordinator has setup the project in e-BUILDER, & that you have loaded the appropriate budget template and created a ‘zero’ dollar budget
  - This will be in affect until the system goes live February 1st 2017

- Completing a Design & Construction Request
- Completing a Modification to a Design & Construction Request
Step 01 – Fill Out the Project Authorization Request

- Login to e-Builder
- Click the ‘Projects’ tab and locate the project

- You can utilize the ‘Search’ function in the top right corner of the screen
Step 01 – Fill Out the Project Authorization Request

- Click on ‘Processes’
Step 01 – Fill Out the Project Authorization Request

- Click on ‘Start Process’
Step 01 – Fill Out the Project Authorization Request

- Click on ‘Project Authorization Request’

<table>
<thead>
<tr>
<th>Process Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Amendment (AM-00)</td>
<td>It is required by law to solicit bids if the total project budget exceeds $215,000. The solicitation is posted in a local newspaper and if the contract is over $1,000,000 to the electronic bidding forum, Bid Express.</td>
</tr>
<tr>
<td>Bidding &amp; Award (BID)</td>
<td></td>
</tr>
<tr>
<td>Change Order (CO)</td>
<td></td>
</tr>
<tr>
<td>Contract Approval (CA-00)</td>
<td>Contract Approval for Design Professionals, CM at Risk, Design Build, GC/MP and Furniture Agreements. The purpose of this BP is to prepare and execute the contract. The completion of this BP will result in a fully executed Contract, issuance of the Notice to Proceed, and entry of the contract value on the Project Cost Sheet.</td>
</tr>
<tr>
<td>Direct Assign Selection (DA)</td>
<td>Direct Assignment of an Architect/Engineer or Consultant is appropriate when services do not exceed $50,000.</td>
</tr>
<tr>
<td>Pick Three (P3)</td>
<td>Architect/Engineer or Consultant Pick Three Selection with Interviews is appropriate if the amount of services are less than or valued at $250,000.</td>
</tr>
<tr>
<td>Project Authorization Request (PAR2)</td>
<td></td>
</tr>
<tr>
<td>Request for Qualifications (RFQ)</td>
<td>Select service providers for projects (Design Professionals, Contractors, etc.). Includes request for A/E, CMAR, and DB.</td>
</tr>
</tbody>
</table>
Step 01 – Fill Out the Project Authorization Request

- Select the ‘Current Request’ type
Step 01 – Fill Out the PAR (Design & Construction Request)

• Attach the PIF associated with the project authorization request
• You can find this in the e-BUILDER file structure
Step 01 – Fill Out the PAR (Design & Construction Request)

- Enter the CF&PC target date
- Enter the BoT target date (if applicable)
Step 01 – Fill Out the PAR (Design & Construction Request)

- Enter the project contact information
  - Select the role associated with the project contact
  - Enter the project contact’s name, email address and phone number
- Click ‘Add’
Step 01 – Fill Out the PAR (Design & Construction Request)

- Enter the budget line items
  - Line Item (Task Number)
    - Be sure to select the ‘generic’ line item (I.E. you will select 01-000 and enter the total amount for task 01 rather than entering all detailed sub-tasks)
  - Amount
- Click ‘Add’ or ‘Delete’ in the last column as needed
Step 01 – Fill Out the PAR (Design & Construction Request)

- Enter Capital Project Funding Sources
  - Select the appropriate funding source (definitions are included above the funding source table)
  - Enter the requested account details (scroll over the ‘?’ in the table to see what is required for each funding source)
  - Enter the amount previously approved for the identified funding source (for a Design & Construction Request, the amount will be zero)
  - Enter the amount you are currently seeking approval for with the identified funding source
  - Enter the project budget (previous plus current approval) for the identified funding source
- Click ‘Add’
Step 01 – Fill Out the PAR (Design & Construction Request)

- Select if the project includes ‘Gift’ or ‘Gift Bridge Loans’ as a funding source
- Select if the project includes ‘External Debt Funded Internal Loan’, ‘Gift Bridge Loan’, ‘Work Capital Advance’ or ‘Working Capital Internal Loan’
Step 01 – Fill Out the PAR (Design & Construction Request)

- Enter the Project Information
  - Preliminary Work Completed
  - Purpose of the project
  - Scope of Work for the project
Step 01 – Fill Out the PAR (Design & Construction Request)

- Enter the Project Schedule
  - Project Stage
  - Start Date
  - Finish Date
- Click ‘Add’
Step 01 – Fill Out the PAR (Design & Construction Request)

- Enter the major alternatives that have been considered for the project
Step 01 – Fill Out the PAR (Design & Construction Request)

- Enter the risks and mitigation strategies for the project
  - Identified Risk
  - Mitigation Strategy for identified risk
- Click ‘Add’
Step 01 – Fill Out the PAR (Design & Construction Request)

- Select the impact the project will have on Campus Gross Square Footage
- Select the impact the project will have on Operations & Maintenance
Step 01 – Fill Out the PAR (Design & Construction Request)

- Submit the Project Authorization Request
- Can also save a draft and return to the request later
Step 01 – Fill Out the PAR (Modification Request)

- Login to e-Builder
- Click the ‘Projects’ tab and locate the project

- You can utilize the ‘Search’ function in the top right corner of the screen
Step 01 – Fill Out the PAR (Modification Request)

- Click on ‘Processes’
Step 01 – Fill Out the PAR (Modification Request)

- Select ‘Finished’
- Click ‘Filter’
Step 01 – Fill Out the PAR (Modification Request)

- Find the previously submitted PAR and click on the subject line
- Be sure the step the process is in is ‘Finish’
Step 01 – Fill Out the PAR (Modification Request)

- Select ‘Copy’
- The page will refresh and you will select ‘Modification of Design & Construction’ for the ‘Current Request Type’
Step 01 – Fill Out the PAR (Modification Request)

- Update the CF&PC target date
- Update the BoT target date (if applicable)
Step 01 – Fill Out the PAR (Modification Request)

- Enter or edit the project contact information as necessary
  - To Add:
    - Select the role associated with the project contact
    - Enter the project contact’s name, email address and phone number
    - Click ‘Add’
  - To Edit:
    - Select the pencil next to the field you would like to update
Step 01 – Fill Out the PAR (Modification Request)

- Enter the budget line items
  - Select a Line Item (Task Number)
    - Be sure to select the ‘generic’ line item (I.E. you will select 01-000 and enter the total amount for task 01 rather than entering all detailed sub-tasks)
  - Enter an Amount
  - Click ‘Add’ or ‘Delete’ in the last column as needed
Step 01 – Fill Out the PAR (Modification Request)

- Enter or Edit the Capital Project Funding Sources
  - To Add:
    - Select the appropriate funding source (definitions are included above the funding source table)
    - Enter the requested account details
    - Enter the amount previously approved for the identified funding source
    - Enter the amount currently seeking approval for the identified funding source
    - Enter the project budget (previous plus current approval) for the identified funding source
    - Click ‘Add’
  - To Edit:
    - Click on the funding source name to select a different funding source for the line item
    - Click the pencil in the Account Details, Previous Approvals, Current Approval or Project Budget columns
Step 01 – Fill Out the PAR (Modification Request)

- Select if the project includes ‘Gift’ or ‘Gift Bridge Loans’ as a funding source
- Select if the project includes ‘External Debt Funded Internal Loan’, ‘Gift Bridge Loan’, ‘Work Capital Advance’ or ‘Working Capital Internal Loan’
Step 01 – Fill Out the PAR (Modification Request)

- Enter or Edit the Project Information
  - Preliminary Work Completed
  - Purpose of the project
  - Scope of Work for the project
Step 01 – Fill Out the PAR (Modification Request)

- Enter or Edit the Project Schedule
  - To Add:
    - Project Stage
    - Start Date
    - Finish Date
    - Click ‘Add’
  - To Edit:
    - Click on the project stage to select a different option for that line item
    - Click the pencil in the Start Date and Finish Date columns
Step 01 – Fill Out the PAR (Modification Request)

- Enter or Edit the major alternatives that have been considered for the project

<table>
<thead>
<tr>
<th>Alternatives Considered</th>
</tr>
</thead>
<tbody>
<tr>
<td>Major Alternatives Considered:</td>
</tr>
<tr>
<td>No major alternatives considered.</td>
</tr>
</tbody>
</table>
Step 01 – Fill Out the PAR (Modification Request)

- Enter or Edit the risks and mitigation strategies for the project
  - To Add:
    - Identified Risk
    - Mitigation Strategy for identified risk
    - Click ‘Add’
  - To Edit:
    - Click the pencil in the identified risk and mitigation strategy columns
Step 01 – Fill Out the PAR (Modification Request)

- Select the impact the project will have on Campus Gross Square Footage
- Select the impact the project will have on Operations & Maintenance
Step 01 – Fill Out the PAR (Modification Request)

- Submit the Project Authorization Request
- Can also save a draft and return to the request later
Step 01 – Fill Out the PAR (Modification Request)

- The window will close and you will need to go back into the PAR which should be at the ‘Modification Summary’ step
- Ensure you have unchecked ‘Finished’
- You may need to click ‘Filter’ to refresh the page
Step 01 – Fill Out the PAR (Modification Request)

- Indicate under ‘Modifications’ which sections of the PAR have been revised by selecting ‘Yes’ or ‘No’
Step 01 – Fill Out the PAR (Modification Request)

- Attach the original PAR which can be found by clicking ‘Browse e-Builder’
**Step 01 – Fill Out the PAR (Modification Request)**

- At the top or bottom of the page, select ‘Take Action’

### Project Authorization Request (PAR2) - 4

<table>
<thead>
<tr>
<th>Details</th>
<th>Values</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project</td>
<td>Rachel's Test Project</td>
</tr>
<tr>
<td>Process Document</td>
<td>PAR2 - 4</td>
</tr>
<tr>
<td>Current Workflow Step</td>
<td>Modification Summary</td>
</tr>
<tr>
<td>Subject</td>
<td>Rachel's Test Project: Project Authorization Request - Modification of Design &amp; Construction</td>
</tr>
<tr>
<td>Status</td>
<td>Submitted</td>
</tr>
</tbody>
</table>

- **Submit**
- **Take Action**

**Modifications**

- Project Authorization Request Information Modified: Yes/No
- Scope Modified: Yes/No

---

Project Authorization Request User Guide - [Return to Table of Contents](#)
Step 02A – 35C Review / Approve the Project Authorization Request

- PAR Approvers will receive a notification there is a PAR awaiting their review and approval.

- PAR Approvers can click on ‘View Details’ in the e-mail notification to access e-Builder.
Step 02A – 35C Review / Approve the Project Authorization Request

- PAR Approvers can review the PDF of the PIF and the PAR

<table>
<thead>
<tr>
<th>Project Authorization Request (PAR2) - 4</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Project:</strong> Rachel's Test Project</td>
</tr>
<tr>
<td><strong>Process Document:</strong> PAR2 - 4</td>
</tr>
<tr>
<td><strong>Current Workflow Step:</strong> 01M - Director Approval</td>
</tr>
<tr>
<td><strong>Subject:</strong> Modification of Design &amp; Construction</td>
</tr>
<tr>
<td><strong>Project Number:</strong> 123456789</td>
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<tr>
<td><strong>Overall Due Date:</strong></td>
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<tr>
<td><strong>Step Due Date:</strong></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Details</th>
<th>Comments</th>
<th>Attached Documents</th>
<th>Attached Processes</th>
<th>Attached Forms</th>
<th>Attached To</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Project Authorization Request Information</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Current Request Type:</strong> Modification of Design &amp; Construction</td>
</tr>
<tr>
<td><strong>CFRPC Target Date:</strong> 09/29/2017</td>
</tr>
<tr>
<td><strong>Board of Trustees Target Date:</strong> 10/27/2017</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>PAR Document</th>
<th>PIE Document</th>
</tr>
</thead>
</table>

- Does the project include 'Gifts' or 'Gift Bridge Loan' as a funding source? **Yes**
- Does the project include 'External Debt Funded Internal Loan', 'Gift Bridge Loan', 'Working Capital Advance', or 'Working Capital Internal Loan' as a funding source? **Yes**
Step 02A – 35C Review / Approve the Project Authorization Request

- PAR Approvers can view comments left by others within the process, add comments for internal users or request a comment from an external user
Step 02A – 35C Review / Approve the Project Authorization Request

- PAR Approvers can approve or request the PM to revise the PAR and click ‘Take Action’
Step 02A – 35C Review / Approve the Project Authorization Request

• If a revision is requested:
  • **Minor Revision Request** (requesting for a section other than Funding, Scope, Schedule or Budget to change)
    • This will send the PAR back to the PM for the minor revision and require review / approval from the approver who requested the revision
  • **Major Revision Request** (requesting for the Funding, Scope, Schedule or Budget to change)
    • This will send the PAR back to the PM for the major revision and will re-start the approval process
Step 36 & 37 – Gather PARs for CF&PC

- The Administrative Support Specialist will run a report in e-Build
- Click on the ‘Reports’ tab
Step 36 & 37 – Gather PARs for CF&PC

- Click on the 'PARs Pending Financial Approval' report
Step 36 & 37 – Gather PARs for CF&PC

- Click on the ‘Re-Run Report’
Step 36 & 37 – Gather PARs for CF&PC

• Click on the ‘Export’ and select ‘Excel Data Export’
Step 36 & 37 – Gather PARs for CF&PC

- Can also send the report without exporting by clicking ‘Send’
Step 36 & 37 – Gather PARs for CF&PC

- Enter the email address, a subject, a message and click ‘Send’
Steps 38 - 40 CF&PC Approval

• The AVP of ADC will present the PARs to CF&PC and provide the formal approval date to the Administrative Support Specialist
Step 41 – CF&PC Approval

- The Administrative Support Specialist will record the CF&PC approval date on the PAR
Step 41 – CF&PC Approval

- If the PAR is completed, the Project Manager will formally accept it.
- If the PAR requires BoT approval, move to Step 42.
Steps 42 - 44 Gather PARs for BoT

- The Administrative Support Specialist will run a report in e-BUILDER
- Click on the ‘Reports’ tab
Steps 42 - 44 Gather PARs for BoT

- Click on the 'PARs Pending Financial Approval' report
Steps 42 - 44 Gather PARs for BoT

- Click on the ‘Re-Run Report’
Steps 42 - 44 Gather PARs for BoT

- Click on the ‘Export’ and select ‘Excel Data Export’
Steps 42 - 44 Gather PARs for BoT

- Can also send the report without exporting by clicking ‘Send’
Steps 42 - 44 Gather PARs for BoT

- Enter the email address, a subject, a message and click ‘Send’
Steps 45 - 47 BoT Approval

- The AVP of ADC will present the PARs to the BoT and provide the formal approval date to the Administrative Support Specialist
Step 48 – BoT Approval

- The Administrative Support Specialist will record the BoT approval date on the PAR
Step 49 – Project Manager Acceptance

- The Project Manager will need to formally Accept the PAR
- Click ‘Take Action’
Steps 42 thought 45 – PAR Approver Notification

- All PAR approvers will receive a notification the PAR has been approved
Sending a Comment to External Users

- Users can send the PAR to someone outside of the system for review by clicking on the ‘Comments’ tab.

Once there, click ‘Request Comment’
Sending a Comment to External Users

- User can enter the email address of the external user, allow external users to attach files, alter the subject of the message, enter a date for the user to respond by, and include a message

- Click ‘Request Comment’
Sending a Comment to External Users

- The requested commenter will receive an email notification like the one pictured below

- Click ‘Click Here’
Sending a Comment to External Users

- The requested commenter will see the screen pictured below and can view the PIF and PAR PDFs.
Sending a Comment to External Users

- The requested commenter can select ‘Add Comment’ to reply to the user or simply close their browser.
Sending a Comment to External Users

- The requested commenter will fill out their name, company (Ohio University), e-mail address, add their comment, click ‘Save’ and close their browser
Sending a Comment to External Users

- The user will receive a notification that the requested commenter has responded

Select ‘Click Here’ and login to e-BUILDER
Sending a Comment to External Users

- The user should navigate back to the PAR, click on the ‘Comments’ tab and see the response

![Comment Interface]

Response to Rachel Patrick’s external comment request from Rachel, Ohio University:

Response

Requested comment on step 02 - CFAO Approval from Rachel Patrick patrickr@ohio.edu.
Sending a Comment to Internal Users

- The user can send another comment to an external user or add a comment to the PAR (in which only system users will see) by clicking on ‘Comment’
Sending a Comment to Internal Users

- The user will type in their comment and can upload files
- Once completed, select ‘Add Comment’
Sending a Comment to Internal Users

- The user should then see their comment appear on the ‘Comments’ tab

**Comment test**

Response to Rachel Patrick's external comment request from Rachel, Ohio University (patrickr@ohio.edu):

Looks good. Go ahead and approve.

Requested comment on step 03 - Facilities Programmer Review from patrickr@ohio.edu with a respond by date of 10.19.2017.

Please Review
When a PAR approver requests a revision of a PAR they will be asked to input a comment related to the revision.
Once a comment is input, the user will need to navigate back to the process and open the next step (which should be labeled ‘01 – Revision Details’).
Requesting a Minor Revision – PAR Approver

- Select ‘Other’
  - If you are requesting a revision for Funding, Scope, Schedule or Budget please see Requesting a Major Revision
- Click ‘Take Action’
Requesting a Minor Revision – PAR Approver

- The PAR with your comments will route back to the PM for revisions
- You will get a notification once the PAR is resubmitted and ready for your review
Requesting a Major Revision – PAR Approver

When a PAR approver requests a revision of a PAR they will be asked to input a comment related to the revision.
Requesting a Major Revision – PAR Approver

- Once a comment is input, the user will need to navigate back to the process and open the next step (which should be labeled ‘01 – Revision Details’).
Requesting a Major Revision – PAR Approver

- Select the section you have requested a revision for
  - If you are requesting a revision for a section other than Funding, Scope, Schedule or Budget please see Requesting a Minor Revision
- Click ‘Take Action’
Requesting a Major Revision – PAR Approver

- The PAR with your comments will route back to the PM for revisions
- The PAR will then route back to the beginning of the Approver list for others to view the major change
Executing a Revision

- When a PAR Approver requests a revision of a PAR, the Project Manager will be notified.
- The Project Manager should review the comments from the PAR Approver and make the necessary edits.
Executing a Revision

- **Editing Guidance:**
  - CF&PC or BoT Approvals
  - Project Contact Information
  - Budget Line Items
  - Funding Sources
  - Foundation / Treasury Approval
  - Project Information
  - Project Schedule
  - Alternatives Considered
  - Risks & Mitigation Strategies
  - Impact on Campus
Loading a Budget Template

- Navigate to the project and click ‘Cost’ in the left menu
- Click on ‘Budget Details’
- Click ‘Here’
Loading a Budget Template

- Click ‘Apply Template’
Loading a Budget Template

• Select the budget template that fits the project
Loading a Budget Template

- Click ‘Continue’ at the bottom of the page

<table>
<thead>
<tr>
<th>Item Code</th>
<th>Description</th>
<th>Allow Changes</th>
<th>Approval Required for Change</th>
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<tbody>
<tr>
<td>1000</td>
<td>Personnel Services - Capacity</td>
<td></td>
<td></td>
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<tr>
<td>1010</td>
<td>Personnel Services - Overtime</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1020</td>
<td>Travel and Subsistence</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1030</td>
<td>Professional Services</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1040</td>
<td>Equipment and Supplies</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1050</td>
<td>Construction</td>
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<tr>
<td>1060</td>
<td>General Contract</td>
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<td>1070</td>
<td>Subcontractors and Suppliers</td>
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<td></td>
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<tr>
<td></td>
<td>Total Budget</td>
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<td></td>
</tr>
</tbody>
</table>
Loading a Budget Template

A ‘zero’ dollar draft budget will populate

<table>
<thead>
<tr>
<th>Use Code</th>
<th>Description</th>
<th>Allocation</th>
<th>Allow Charges</th>
<th>Approval Required for Change</th>
<th>Original Budget</th>
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<tbody>
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<td>Professional Services</td>
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<td>General Contract</td>
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<td>Dome Prepaid Equipment - Contracts Tracked</td>
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<tr>
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<td>Contingency</td>
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<td>In House Costs - Equipment</td>
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<td>Shop Billing - Facilities</td>
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<td>Shop Billing - CIT</td>
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<td>✓</td>
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<tr>
<td>03-100</td>
<td>Meeting Service</td>
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<tr>
<td>03-120</td>
<td>Advertising &amp; Branding</td>
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<td>03-160</td>
<td>O&amp;M Purchased - Equipment</td>
<td></td>
<td>✓</td>
<td>✓</td>
<td>0.00</td>
</tr>
<tr>
<td>03-170</td>
<td>O&amp;M Purchased - Equipment</td>
<td></td>
<td>✓</td>
<td>✓</td>
<td>0.00</td>
</tr>
</tbody>
</table>

Total: 0.00
Loading a Budget Template

- At the top of the page click ‘Approve’
Loading a Budget Template

- You will be prompted to select an approval date and enter any comments you would like to capture, then click ‘Yes, Approve the Budget’
Loading a Budget Template

- The status of the budget should now say ‘Approved’
Loading a PIF / PAR from e-Builder Files

- Select ‘Browse e-Builder’
Loading a PIF / PAR from e-Builder Files

- Select ‘00 Concept Development’
Loading a PIF / PAR from e-Builder Files

• Select ‘02 Project Approval’
Loading a PIF / PAR from e-Builder Files

- Select the appropriate document and click ‘Attach’