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<td>- Administrative Support Specialist</td>
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<tr>
<td>- Architecture Design &amp; Construction Director</td>
</tr>
<tr>
<td>- Capital Project Finance Budget Analyst</td>
</tr>
</tbody>
</table>
Overview

- The project intake and approval process helps campus leadership prioritize improvements and manage the entire campus comprehensively.
  - The user will submit a project request, University Planning will conduct a preliminary review and create the agenda for Work Coordination
  - The PIFs will be taken to Work Coordination and assigned to one of three departments (University Planning, Architecture Design & Construction or Facilities Management)
  - For requests which are assigned to a Project Manager within Architecture Design & Construction with a budget under $100,000; the approval of the PIF will constitute as authorization for a funding transfer
Roles

- Project Initiation Form Submitter
- Project Initiation Form Approver
- Architecture Design & Construction Administrative Support Specialist
- Architecture Design & Construction AVP
- Facilities Management & Safety AVP
- University Planning Facilities Programmer
- Capital Project Finance Director
- University Planning AVP
- Architecture Design & Construction Director
- Capital Project Finance Budget Analyst
Step 01 – Fill Out Project Initiation Form

- Navigate to the Project Initiation Guidance webpage
- Select the type of PIF you need to submit (bottom of the webpage)
  - Planning
  - Cost Estimate
  - New Construction
  - Alteration, Renovation or Remodeling
  - Space / Lease
Step 01 – Fill Out Project Initiation Form (All PIF Types)

- Fill out the submitter information by entering the following:
  - Name
  - Phone Number
  - E-mail Address
Step 01 – Fill Out Project Initiation Form (All PIF Types)

- Fill out the submitter information by entering the following:
  - Select the campus you reside on
  - Select the Planning Unit you are associated with
  - Select the Department you are associated with
  - Select the CFAO Approver for your Planning Unit (there should only be one option as this populates based on the ‘Planning Unit’ selection)
Step 01 – Fill Out Project Initiation Form (All PIF Types)

To add a funding source:

- Definitions for each of the funding source options are listed at the top of the funding table; you **DO NOT** have to submit funding information with your project request
Step 01 – Fill Out Project Initiation Form (All PIF Types)

To add a funding source:

- Select the funding source from the drop-down menu
- Enter the estimated funding amount
- Enter the account number for the funding source if it is known
- Click ‘Add’
Step 01 – Fill Out Project Initiation Form (All PIF Types)

To add a funding source:

- The information will populate in the table on the web form
- You can enter as many funding sources as necessary or edit previously entered funding sources

<table>
<thead>
<tr>
<th>#</th>
<th>PIF Funding Source</th>
<th>Estimated Funding Amount</th>
<th>Account Number</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Internal Bank Financing</td>
<td>100,000.00</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Departmental Funding</td>
<td>5,000,000.00</td>
<td>123456</td>
</tr>
</tbody>
</table>
Step 01 – Fill Out Project Initiation Form (All PIF Types)

- The submitter can add comments at the bottom of the form to document anything that does not relate to pre-populated questions on the PIF
Step 01 – Fill Out Project Initiation Form (Planning PIF)

For the Planning PIF fill out the general and project information by entering the following:

- Brief description of project
- Select an option from the drop-down menu that describes your planning need
  - If other, please describe
- Document the needs or goals that are driving your project
- Select what type(s) of work have previously been completed related to your request (can select multiple by holding ‘CTRL’)
- Enter the desired planning completion date
- Document the factors that make the desired completion date significant
- Notate if funding is available
Step 01 – Fill Out Project Initiation Form (Cost Estimating PIF)

For the Cost Estimating PIF fill out the general and project information by entering the following:

- Brief description of project
- Document the project scope
- Describe the relationship your request has to other capital projects
- Enter the desired construction completion date
- Document the factors that make the desired completion date significant
- Document the location of the request
- Notate if funding is available

<table>
<thead>
<tr>
<th>General Information</th>
</tr>
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<tbody>
<tr>
<td>Brief Description of Project</td>
</tr>
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</table>

<table>
<thead>
<tr>
<th>Project Information:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Scope</td>
</tr>
<tr>
<td>Relationship to other Capital Projects</td>
</tr>
<tr>
<td>Desired Construction Completion Date:</td>
</tr>
<tr>
<td>What Factors Make the Desired Construction Completion Date Significant?</td>
</tr>
<tr>
<td>Location:</td>
</tr>
<tr>
<td>Is Funding Available: Yes</td>
</tr>
</tbody>
</table>

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Step 01 – Fill Out Project Initiation Form (New Construction PIF)

For the New Construction PIF fill out the general and project information by entering the following:

- Brief description of project
- Document the project scope
- Describe the relationship your request has to other capital projects
- Select what type(s) of work have previously been completed related to your request (can select multiple by holding ‘CTRL’)
- Enter the desired construction completion date
- Document the factors that make the desired completion date significant
- Document the location of the request
- Notate if funding is available
Step 01 – Fill Out Project Initiation Form (Alteration, Renovation or Remodeling PIF)

- For the Alteration, Renovation or Remodeling PIF fill out the general and project information by entering the following:
  - Brief description of project
  - Document the project scope
  - Describe the relationship your request has to other capital projects
  - Select what type(s) of work have previously been completed related to your request (can select multiple by holding ‘CTRL’)
  - Enter the desired construction completion date
  - Document the factors that make the desired completion date significant
  - Document the location of the request
  - Notate if funding is available
Step 01 – Fill Out Project Initiation Form (Space / Lease PIF)

For the Space / Lease PIF fill out the general and project information by entering the following:

- Brief description of project
- Select an option from the drop-down menu that describes your space issue
  - If other, please describe
- Select an option from the drop-down menu that describes your reason for the request
  - If other, please describe
- Document what type of space you are looking for
- Document where you would like the space
- Document the amount of space you are requesting
- Document if there are any special features you are seeking
Step 01 – Fill Out Project Initiation Form (All PIF Types)

- When you are finished filling out the PIF, click ‘Submit’
- You will be asked to confirm you are not a robot
- Follow the necessary steps and click ‘Submit’
Step 01 – Fill Out Project Initiation Form (All PIF Types)

- You will receive a confirmation that your PIF has been submitted

*Submitted*

Thank you for submitting the Project Initiation Form, someone will be in contact with you in a week.

If you have any questions regarding your submission, please contact Brenda Slack, Facilities Programmer at slackb@ohio.edu.

If you would like to provide feedback on the PIF process, please click the following link: https://ohio.qualtrics.com/jfe/form/SV_cwLXjcFRpoACkB

*End for PIFSubmitter*
Step 02 – Assign a Name

- The Administrative Support Specialist will receive a notification from the system stating there is a PIF in their ‘court’

User can access the PIF directly from the e-mail notification by clicking ‘Click Here’
Step 02 – Assign a Name

- Administrative Support Specialist will see the screen pictured below
Step 02 – Assign a Name

- Administrative Support Specialist can find information to assist with naming the PIF by opening the PDF attachment of the PIF
Step 02 – Assign a Name

- Administrative Support Specialist will assign a name to the PIF and the name shall contain the following information:
  - Location / Building
  - Rooms / Floors
  - Type of Work
  - Fiscal Year
Step 02 – Assign a Name

- Administrative Support Specialist will use the CFAO Approver information to assign the appropriate CFAO to approve the PIF in the next step.
Step 02 – Assign a Name

- Administrative Support Specialist will ‘Approve’ the PIF once the name is assigned and the CFAO is noted by clicking ‘Take Action’
Step 03 – Assign a CFAO

- Administrative Support Specialist will select the appropriate CFAO Approver to approve the PIF by selecting the CFAO’s name from the list, clicking the arrow, and selecting ‘Approve’
Step 03 – Notify the PIF Submitter

- Administrative Support Specialist will send an e-mail VIA e-BUILDER to update the PIF submitter of the following information:
  - Their PIF has been successfully submitted
  - Their PIF has been assigned to the CFAO for approval
Step 03 – Notify the PIF Submitter

• Click on the ‘Projects’ tab
Step 03 – Notify the PIF Submitter

- Select the ‘Project Initiation Form’ project
Step 03 – Notify the PIF Submitter

- Click on ‘Documents’
Step 03 – Notify the PIF Submitter

- Click ‘00 Concept Development’ and ‘01 Investigation’
Step 03 – Notify the PIF Submitter

- Find the document you would like to send and click ‘Send’
Step 03 – Notify the PIF Submitter

- Enter the e-mail address of the PIF submitter and in the subject line enter "PIF Update – ‘insert PIF name’"
Step 03 – Notify the PIF Submitter

The message should include the following:

- Thank you for submitting the attached Project Initiation Form (PIF). This PIF has been named ‘insert the name of the PIF’ and has been routed to your Planning Unit’s CFAO for approval. If you have any questions please feel free to contact myself or Brenda Slack (slackb@ohio.edu).
Step 03 – Notify the PIF Submitter

- Click ‘Send’
Step 03 – Notify the PIF Submitter

- The PIF Submitter will receive an e-mail like the one pictured below

![Email example](image)

**Project Initiation Form**

From: Rachel Patrick
To: patrick@ohio.edu
CC:

Thank you for submitting the attached Project Initiation Form (PIF). This PIF has been name Text and has been routed to your Planning Unit's CFAO for approval. If you have any questions please feel free to contact myself or the Facilities Planner (Brenda Sack, satchi@ohio.edu).

Thank you,

Administrative Support Specialist

Documents attached to this email

1. PIF-00001 - Test PIF 001.pdf

e-Builder Technical Support
phone: 1-888-388-5717 fax: 1-888-576-5322
support@e-builder.net

Project Initiation User Guide - Return to Table of Contents
Step 04 – CFAO Notification

• The assigned CFAO will receive an e-mail notification from the system that they have a PIF to review and approve

• The assigned CFAO can click on ‘Click Here’ to access e-Builder
Step 05 – CFAO Review

- The assigned CFAO will login to e-Builder and see the screen pictured below
- The assigned CFAO can review the PIF by opening the PDF
Step 05 – CFAO Review

- The assigned CFAO can send the PIF to someone outside of the system for review by clicking on the ‘Comments’ tab

- Once there, click ‘Request Comment’
Step 05 – CFAO Review

- The assigned CFAO 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’
Step 05 – CFAO Review

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

• Click ‘Click Here’
Step 05 – CFAO Review

- The requested commenter will see the screen pictured below and can view the PIF PDF.
### Step 05 – CFAO Review

- The requested commenter can select ‘Add Comment’ to reply to the assigned CFAO or simply close their browser.
Step 05 – CFAO Review

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

![Add Comment Form](image)
Step 05 – CFAO Review

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

  ![Project Initiation Form](image)

- Select ‘Click Here’ and login to e-BUILDER
Step 05 – CFAO Review

- The assigned CFAO should navigate back to the PIF, click on the ‘Comments’ tab and see the response.
Step 05 – CFAO Review

- The assigned CFAO can send another comment to an external user or add a comment to the PIF (in which only system users will see) by clicking on ‘Comment’.
Step 05 – CFAO Review

- The assigned CFAO will type in their comment and can upload files
- Once completed, select ‘Add Comment’
Step 05 – CFAO Review

- The assigned CFAO should then see their comment appear on the ‘Comments’ tab
Step 05 – CFAO Review

- The assigned CFAO will need to either approve or void the PIF
- Select from the drop-down list at the top of the screen and click ‘Take Action’

**Remember:** For requests that are assigned to a Project Manager within Architecture Design & Construction with budgets under $100,000 the approval of this request authorizes a funding transfer
Step 05 – CFAO Review

- If the assigned CFAO approves the PIF, they will return back to the home screen
- If the assigned CFAO voids the PIF, they will be asked to document why
  - Once the assigned CFAO has entered their comment, they will click ‘Void’

• End for assigned CFAO
Step 05a – PIF Submitter Update (Disapproved PIF)

- If the assigned CFAO voids the PIF the Administrative Support Specialist will receive a notification from the system documenting the PIF was voided.

- The Administrative Support Specialist will send an e-mail to the PIF Submitter updating them on the status of their PIF and why it was voided.
Step 06 – PIF Submitter Update (Approved PIF)

- If the assigned CFAO approves the PIF the Administrative Support Specialist will receive a notification from the system documenting the PIF was approved.

- The Administrative Support Specialist will send an e-mail to the PIF Submitter with an update that the PIF has been approved by their CFAO and has transitioned to the Facilities Programmer (Brenda Slack, slackb@ohio.edu)
Step 07 – Facilities Programmer Review

- The Facilities Programmer will receive a notification that a PIF is in their ‘court’

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<tr>
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</thead>
<tbody>
<tr>
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<td><strong>Process</strong></td>
</tr>
<tr>
<td><strong>Subject</strong></td>
</tr>
<tr>
<td><strong>Step</strong></td>
</tr>
<tr>
<td><strong>In Step Since</strong></td>
</tr>
<tr>
<td><strong>Last Action</strong></td>
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<tr>
<td><strong>Last Action Taken By</strong></td>
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<tr>
<td><strong>Status</strong></td>
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<table>
<thead>
<tr>
<th>Submitter Information</th>
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<tbody>
<tr>
<td><strong>Name</strong></td>
</tr>
<tr>
<td><strong>E-Mail</strong></td>
</tr>
<tr>
<td><strong>Phone Number</strong></td>
</tr>
</tbody>
</table>

- The Facilities Programmer can click ‘Click Here’ to access e-Builder
Step 07 – Facilities Programmer Review

- The Facilities Programmer will login to e-Builder and see the screen pictured below.
- The Facilities Programmer can review the PIF by opening the PDF.
Step 07 – Facilities Programmer Review

- The Facilities Programmer should add comments as necessary to document their preliminary review of the PIF
  - External user comment request
  - Internal user comment
The Facilities Programmer should select whether the project requested on the PIF is included in the current Capital Improvement Plan (CIP)
Step 07 – Facilities Programmer Review

- The Facilities Programmer should enter the Capital Planning Record Number if the project requested on the PIF is included in the current CIP
Step 08 – Work Coordination Recommendation

- Once the Facilities Programmer is ready for the PIF to route on to Work Coordination, they will select 'Reviewed' and click ‘Take Action’
- If the Facilities Programmer would like to route the PIF directly to University Planning, they will select 'Planning Review' and assign a Planner
Step 09 – Work Coordination Agenda

• All Work Coordination attendees will receive an email from the Administrative Support Specialist before Work Coordination with all the PIFs on the agenda

• All Work Coordination attendees will receive an email from the Administrative Support Specialist after Work Coordination with the meeting minutes
Step 09 – Work Coordination Agenda

- The Administrative Support Specialist will run a report before Work Coordination to provide a list of PIFs for review.
Step 09 – Work Coordination Agenda

- The Administrative Support Specialist will click on the ‘Reports’ tab
Step 09 – Work Coordination Agenda

- The Administrative Support Specialist will click on the ‘PIF Report – Work Coordination’
Step 09 – Work Coordination Agenda

- The Administrative Support Specialist will click ‘Re-Run Report’
Step 09 – Work Coordination Agenda

- The Administrative Support Specialist will click ‘Export’ and select ‘Excel Data Export’
Step 09 – Work Coordination Agenda

- The Administrative Support Specialist can also send the report without exporting it by clicking ‘Send’
Step 09 – Work Coordination Agenda

- The Administrative Support Specialist will enter e-mail addresses, a subject, message and click ‘Send’
Step 09 – Work Coordination Agenda

- Selected recipients will then receive an email of the report
Step 09 – Work Coordination Agenda

- The Administrative Support Specialist will create a comprehensive PDF of all the PIFs to be presented at Work Coordination, any comments that have been documented on the PIF and any attachments.
Step 10 – Work Coordination

- Work Coordination will review the PIFs along with the Facilities Programmer’s review and / or comments

- Work Coordination will either:
  - Approve and assign a department to the PIF
    - If the PIF is assigned to Architecture Design & Construction the AVP is to assign a Director to the PIF at Work Coordination
  - Void the PIF and provide a reason why
Step 10 – PIF Assignment

• The Administrative Support Specialist will need to assign the PIF to the appropriate department as determined during Work Coordination

• The Administrative Support Specialist will see the screen pictured below
Step 10 – PIF Assignment

- The Administrative Support Specialist can assign the PIF to:
  - Architecture Design & Construction to create a project
  - Architecture Design & Construction to estimate
  - Facilities Management & Safety to execute a work order
  - University Planning for project development
  - Void the PIF
Step 11 + 11A – PIF Assignment (University Planning)

- If the PIF was assigned to University Planning, the Administrative Support Specialist will select ‘Planning’ and select ‘Take Action’

- The Administrative Support Specialist will e-mail the PIF submitter notifying them their PIF was assigned to University Planning and someone from that department will be in contact with the submitter within seven business days.
Step 12 – Project Development (University Planning)

- University Planning will receive a notification that a PIF is in their ‘court’

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<td>Last Action</td>
</tr>
<tr>
<td>Last Action Taken By</td>
</tr>
<tr>
<td>Status</td>
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</tbody>
</table>

- University Planning can click ‘Click Here’ to access e-Builder

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Step 12 – Project Development (University Planning)

- University Planning will login to e-Builder and see the screen pictured below

- University Planning can review the PIF by opening the PDF
Step 12 – Project Development (University Planning)

University Planning can see any comments or attachments on the ‘Comments’ or ‘Attached Documents’ tab respectively.

Project Initiation User Guide - Return to Table of Contents
Step 12 – Project Development (University Planning)

- University Planning can add comments as necessary
  - **External user comment request**
  - **Internal user comment**

- If the PIF needs to be discussed with Real Estate, University Planning should utilize the **External user comment request**
Step 12 – Project Development (University Planning)

- University Planning may work with Architecture Design & Construction during project development

- University Planning will enter information into the Capital Planning Database during project development and when ready will export the data to provide during the project transition to Architecture Design & Construction
Step 14 – Transition Report (University Planning)

- University Planning will run a report from the Capital Planning Database and attach the report in e-Build when a project is transitioned to Architecture Design & Construction by adding an internal comment.
Step 14 – Transition Report (University Planning)

- University Planning will see their comment and attachment in the ‘Comments’ tab
Step 15 – Transition PIF (University Planning)

- University Planning can assign the PIF to Work Coordination, Transition the Project, Void the PIF or document the PIF is completed; University Planning can also document the ADC Director, Project Manager or Project Planner
Step 15 – Transition PIF (University Planning)

- ‘Resubmit to WC’ the PIF will go to Work Coordination
- ‘Transition’ will assign the PIF to Architecture Design & Construction
- ‘Completed’ and 'Void' will end the process
Step 16 + 16A – PIF Assignment (Facilities Management)

- If the PIF was assigned to Facilities Management & Safety, the Administrative Support Specialist will select ‘Work Order’ and select ‘Take Action’

- The Administrative Support Specialist will e-mail the PIF submitter notifying them their PIF was assigned to Facilities Management & Safety and someone from that department will be in contact with them within seven business days.
Step 17 – Execute PIF (Facilities Management)

- The Facilities Management & Safety AVP will receive a notification that a PIF is in their ‘court’

- The Facilities Management & Safety AVP can click ‘Click Here’ to access e-Builder
Step 17 – Execute PIF (Facilities Management)

- The Facilities Management & Safety AVP will login to e-Builder and see the screen pictured below
- The Facilities Management & Safety AVP can review the PIF by opening the PDF
Step 17 – Execute PIF (Facilities Management)

The Facilities Management & Safety AVP can see any comments or attachments on the ‘Comments’ or ‘Attached Documents’ tab respectively.

![Image of the user interface showing comments and attachments]

PIF Review

Files Attached (1):
- PIF Process - FINAL V2.xlsx (Version 2)

Properties | Download | Redline | Remove

Comment:

PIF Review

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

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Step 17 – Execute PIF (Facilities Management)

- The Facilities Management & Safety AVP can add comments as necessary
  - External user comment request
  - Internal user comment
Step 17 – Execute PIF (Facilities Management)

- The Facilities Management & Safety AVP will enter the PIF information into TMA to create a Work Order for Facilities Management & Safety to execute.
- The Facilities Management & Safety AVP can assign a project director, project manager or project planner and can route the PIF back through Work Coordination or mark it 'Completed'.
Step 18 + 18A – PIF Assignment (Architecture Design & Construction)

- If the PIF was assigned to the Architecture Design & Construction Cost Estimator, the Administrative Support Specialist will select ‘Estimating’ and select ‘Take Action’

- The Administrative Support Specialist will e-mail the PIF submitter notifying them their PIF was assigned to Architecture Design & Construction Cost Estimator and that someone from that department will be in contact with them within seven business days.
Step 19 – Cost Estimating (Architecture Design & Construction)

The Architecture Design & Construction Cost Estimator will enter the estimated cost of the PIF and attach the detailed estimate.
Step 19 – Cost Estimating (Architecture Design & Construction)

- The Cost Estimator can add comments as necessary
  - External user comment request
  - Internal user comment
- If there is no account number supplied with the PIF and the customer would like to move forward with the project, the Cost Estimator should document the account number in the comments
Step 19 – Cost Estimating (Architecture Design & Construction)

- The Architecture Design & Construction Cost Estimator will select ‘Take Action’ which will send the PIF back through Work Coordination (Step 10)
Step 20 + 20A – PIF Assignment (Architecture Design & Construction)

- If the PIF was disapproved by Work Coordination, the Administrative Support Specialist will select ‘Void’

- The Administrative Specialist when then enter a comment on why the PIF was voided and send an email to the PIF submitter notifying them of the disapproval and why
Step 20 + 20C – PIF Assignment (Architecture Design & Construction)

- If the PIF was assigned to Architecture Design & Construction, the Administrative Support Specialist will assign the Project Director, select ‘Create Project’ and select ‘Take Action’.

- The Administrative Support Specialist will e-mail the PIF submitter notifying them their PIF was assigned to Architecture Design & Construction and that someone within that department will be in contact with them within seven business days.
Step 21 – Assign Roles (Architecture Design & Construction)

- The Architecture Design & Construction Director can review the PIF by opening the PDF
Step 21 – Assign Roles (Architecture Design & Construction)

The Architecture Design & Construction Director can see any comments or attachments on the ‘Comments’ or ‘Attached Documents’ tab respectively.

![Image of comments and attached documents]
Step 21 – Assign Roles (Architecture Design & Construction)

- The Director can add comments as necessary
  - External user comment request
  - Internal user comment
Step 21 – Assign Roles (Architecture Design & Construction)

- The Architecture Design & Construction Director will select the Project Manager & Project Coordinator that will be assigned to the project from the drop-down menu.
Step 21 – Assign Roles (Architecture Design & Construction)

- The Architecture Design & Construction Director will click ‘Take Action’
Step 22 – Assign Roles (Capital Project Finance)

- The Capital Project Finance Budget Analyst can review the PIF by opening the PDF
Step 22 – Assign Roles (Capital Project Finance)

- The Capital Project Finance Budget Analyst can see any comments or attachments on the ‘Comments’ or ‘Attached Documents’ tab respectively.
Step 22 – Assign Roles (Capital Project Finance)

- The Budget Analyst can add comments as necessary
  - External user comment request
  - Internal user comment
Step 22 – Assign Roles (Capital Project Finance)

- The Capital Project Finance Budget Analyst will select the Accountant that will be assigned to the project from the drop-down menu.
Step 22 – Assign Roles (Capital Project Finance)

- The Capital Project Finance Budget Analyst will select the Project Coordinator assigned to the project from the list on the left, click the arrow and click ‘Assign’.

**End of PIF Process & Spawns ‘Create a Capital Project’**
Sending a Comment to External Users

- Users can send the PIF 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 PDF.
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 PIF, click on the ‘Comments’ tab and see the response.
Sending a Comment to Internal Users

- The user can send another comment to an external user or add a comment to the PIF (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 Interface](image)

- 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