

Starting a Process

Starting the Process

The Process can be started by selected roles and projects

1. To start a process, you must select the Project
2. Click Start Process

Processes for zTraining - The Wave - N/A 1

2

Start Process

Filter Processes

Type of Process: Processes in My Court Draft Open Finished

Status: All Statuses

Containing Text:

Filter

Start a process on zTraining - The Wave

3. Select the process you want to start

Cancel

Process Name	Description
Baseline Change Request (BCR)	Approval to changes to the project which includes schedule, scope, and/or budget changes
Change Order (CO)	Review and negotiation of change in scope of work
General Issue Review Process (GIR)	Process for reviewing general issue items
Project Document / Communication Release (PDCR)	Approve publication of documents
Request for Information (RFI)	Process to gather information to help make a decision on the next course of action

Cancel

4. Filled out all the required fields indicated by a red asterisk.
5. Click Submit in order to route process to next step

5

Change Order (CO)

Start Process Print Check Spelling Submit Save Draft Cancel

Project: zTraining - The Wave
 Process: Change Order
 * Subject:

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

* Description of Change:

+ Reason for Change:

4

As the Process flows through the workflow, certain Users in Roles will need to take Action on the Step

1. The User will receive an email notifying them that there is a process in their Court.
2. When the User logs into e-Builder, from the homepage they can access the Process by clicking the name of the process

Workflow in your court

Show First ten ▼

Project	Name	Subject	Step	Date Due	Requested Comment
zTraining - The Wave	CO - 1	test	SFRTA-PM Review		

[Forms](#) | [Processes](#)

1

3. This will take the User straight to the process
4. If there are multiple Users in a role, the User will need to either Accept or Decline responsibility for reviewing the process
 - When an User accepts responsibility the workflow is removed from the other Users court
 - When an User declines responsibility, its removed from their court.
 - Note if all User's have declined responsibility, the last User will automatically accept responsibility

Change Order (CO) - 1

5

Accept
Decline
-- Pl

Project:	zTraining - The Wa
Process Document:	CO - 1
Current Workflow Step:	SFRTA-PM Review
* Subject:	test
Status:	Submitted

Taking Action on a Process

On each Step, the Actor on the step will be able to review the information filled out by the prior actor

1. The Actor on the step will need to fill out all required fields
2. Select the Action to be Taken
3. Click Take Action, when done

Change Order (CO) - 1

-- Please select an action --

Project:	zTraining - The Wave	Overall Due Date:	
Process Document:	CO - 1	Step Due Date:	
Current Workflow Step:	SFRTA-PM Review Show Workflow Diagram		
* Subject:	<input type="text" value="test"/>		
Status:	Submitted		

Description of Change:	1
Reason for Change:	1
Process Initiator Comments:	

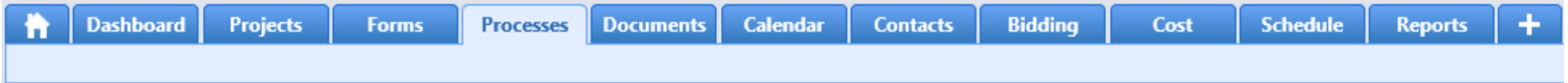
Review Team

* SFRTA-PM Review Comment:	<input style="width: 100%; height: 80px;" type="text"/>
* Cost Estimate Team:	-- Please select an option --
HDR Team Review Comments:	

-- Please select an action --



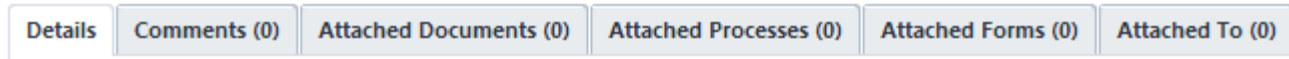
Tabs



On each Step, there are additional Tabs which an Actor can take additional action

Details

The typical process fields



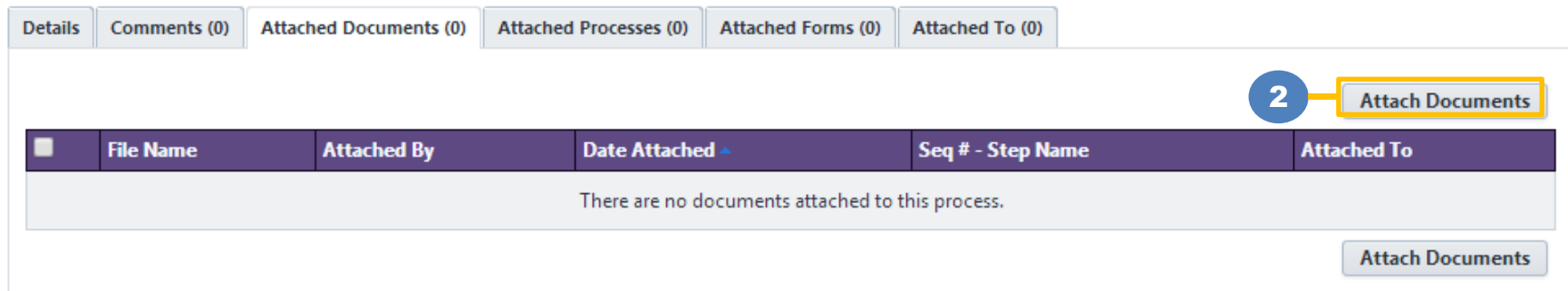
Comments

Allows you to add additional comments to process and request for external (non eB user) comments by clicking Request Comment



Attached Documents

Allows you to view all attached documents to the process and/or attach additional files by clicking Attach Documents



Attached Processes

Allows you to attach related Processes to this Process by clicking Attach Processes

(Example of why you would want to attach another process: If this was a Change Order Process you may want to attach Change Request Process associated with it. Therefore creating the 'relationship' or 'connections' between processes)

[Details](#)
[Comments \(0\)](#)
[Attached Documents \(0\)](#)
[Attached Processes \(0\)](#)
[Attached Forms \(0\)](#)
[Attached To \(0\)](#)

1 Attach Processes

Process	Subject	Current Step	Since	Attached in (Seq # - Step Name)	Attached By	Date Attached
There are no processes attached to this process						

Attach Processes

Attached Forms

Allows you to attach related Forms to this Process by clicking Attach Forms

[Details](#)
[Comments \(0\)](#)
[Attached Documents \(0\)](#)
[Attached Processes \(0\)](#)
[Attached Forms \(0\)](#)
[Attached To \(0\)](#)

2 Attach Forms

Form	Subject	Author	Due Date	Seq # - Step Name	Attached By	Date Attached
There are no forms attached to this process						

Attach Forms

Attached To

Allows you to see if this process was attached to any other process

TIPS

1. At any step in the process, you can click [Show Routing History](#) to get a history of who has taken action and information filled out
2. Click [Current Actor](#) to find out who is/are the current actors on this Step
3. [Show Workflow Diagram](#) to see the actual workflow diagram of the process

Project: zTraining - The Wave
 Process Document: BCR - 1
[Show Routing History](#) | [Current Actors](#)
 Current Workflow Step: HDR Team Level Recommendation [Show Workflow Diagram](#)
 * Subject:
 Status: Submitted

1

Routing History

Details

Name: BCR - 1
Status: Submitted

Steps

#	Step Name	Actor	Action	Due
1	Start	Johanna Ordaz	Submit	
2	HDR Team Level Recommendation	Current Actors...		

Data Fields (14) | Comments (8) | Attached Documents (0) | Attached Processes (0)

Data Field	Edit User	Edit Date
Subject	Johanna Ordaz	05-09-2014
Overall Due Date	Johanna Ordaz	05-09-2014
Construction Cost (\$)	Johanna Ordaz	05-09-2014
Construction Cost Impact (\$)	Johanna Ordaz	05-09-2014
Construction Schedule Impact	Johanna Ordaz	05-09-2014

2

Project: zTraining - The Wave
 Process Document: BCR - 1
[Show Routing History](#) | [Current Actors](#)
 Current Workflow Step: HDR Team Level Recommendation [Show Workflow Diagram](#)
 * Subject:
 Status: Submitted

Comments (0) | Attached Documents (0)

Description of Proposed Change:
Date Required: ?
Drawing Revisions / Specification Numbers:
Supporting Documentation:

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