e-BUILDER TOWN HALL

May 28, 2020
10:00 AM – 11:30 AM
Registration Required via Zoom!

Design and Construction
Project Management Information System

We are excited to share the NEWS! DocuSign e-signatures, fully integrated Contract/Agreement processes, improved Payment efficiencies, standardized SOV process, SIMBA, and much more!

opp.psu.edu/intranet/e-builder-pmis (for registration information)
Presenters/Panelists

Peter Urban, KFA, Inc., System Consultant
Vernon Davis, OPP D&C, Contractor Liaison
Jessica Dubler, OPP D&C, Business Process Analyst
Michelle McMullen, OPP D&C, System Administrator
John Bechtel, OPP D&C, Assistant Director
Number of Registered Attendees

Number of Companies Registered

Company Types Registered

Existing Penn State e-Builder Users

Audience TODAY!
GROUND RULES

THE JOURNEY

PHASE ONE

PHASE TWO ... JUST AN OVERVIEW

SIMBA ... IMPACT?

PHASE TWO DEEP DIVE ... WILL SOON GO LIVE!

SUPPORT AND TRAINING

INNOVATION

Q&A
Ground Rules
Ground RULES for today ... SIMPLE ...

- In a Zoom ‘Webinar’
- For best experience, close all applications
- All muted
- Chat featured, disabled, focus on Q&A feature
- Submit QUESTIONS, at any time
- However, will HOLD Questions until the Q&A session at end
the JOURNEY
Benefits of a single PMIS

• Consistency in processes and practices from beginning to end
• Increased efficiencies and improved accuracy of information
• Improved historical data referencing
• Future elimination of Tririga software
• Improved access to project documentation
• Improved communication and collaboration
• Cost savings
  • No longer paying for third party systems
  • More efficient internal and external resources
  • Operations efficiency
Penn State e-Builder: Governance & Team Structure

Implementation Team

Senior Mgmt Team (SMT)
Provide leadership / guidance

Project Mgmt Team (PMT)
Provide overall project support

CORE Team
Provide key decision support

Pride Leads
Provide process requirements

Pride Teams

- Project Creation
- Capital Planning
- Vendor Management
- Procurement / Bidding
- Meeting Management / Action Items
- Document Management
- BIM Model Sharing
- Mobile Access
- Design Review Management
- Invoice Tracking
- RFI’s / Submittals
- Schedule Management
- Doc / Data Turnover
- PCO’s / CO Tracking
- Punch Lists / Safety / Daily Reports
- Bulletins / ASI’s

Change Management / Outreach Team
PHASE ONE
Project Control/Collaboration

1. Project Request (PROJR)
   - Project request form access and submission

2. Capital Planning
   - Project tracking
   - Fund Source tracking

3. Procurement/Bidding
   - Bidding, 2-C’s

Meeting Minutes/Action Items
- Produce and distribute minutes
- Issue and track action items

Design Decision Request (DDR)
- Document important design decisions

Project Documents, Folder Structure

Consultant Invoice Submission (CI)

Amendment Request (AMEND)

Correspondence (CORR)
- Document and track important conversations and documents

Design Review (DR)
- Start process with integration with Bluebeam
- Final resting place for documents and comments

Bulletin (BLTN)
- Issue changes/revisions to docs.

Schedule Management
- Project milestones, up-to-date!

Equipment Data Management (EQD)

Request for Information (RFI)

Construction Submittals

Construction Pay App Submission (CPA)

Potential Change Order Tracking (PCO)
- Change Order Request (CO)

Daily Field Report (DFR)

Rolling Completion List (RCI)

Punch List (PL)
- Substantial Completion Request

Safety Incident Report (SIR)

Close-Out Checklist (CC)
1,279 Projects!
2,407 Users!
Phase TWO ... just an overview
## Cost Management/Contract Administration

<table>
<thead>
<tr>
<th>Process</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vendor Management (VREG)</td>
<td>Vendor Information</td>
</tr>
<tr>
<td>Procurement/Bidding</td>
<td>Bidding/RFQ/RFP ALL, eventually</td>
</tr>
<tr>
<td>Project Details Update (PDU)</td>
<td></td>
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<tr>
<td>Capital Planning</td>
<td>Project fund source allocations/reporting</td>
</tr>
<tr>
<td>Change Order Execution/Approval (CO)</td>
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</tr>
<tr>
<td>Amendment Execution/Approval (AM)</td>
<td></td>
</tr>
<tr>
<td>Consultant Invoice Approval (CI)</td>
<td></td>
</tr>
<tr>
<td>Construction Pay App Approval (CPA)</td>
<td></td>
</tr>
<tr>
<td>Internal Commitment (IC)</td>
<td></td>
</tr>
<tr>
<td>Internal Commitment Change Order (ICCO)</td>
<td></td>
</tr>
<tr>
<td>Contract (CON) / Agreement (AGMT) Request/Execution/Approval</td>
<td>DocuSign</td>
</tr>
<tr>
<td>Schedule of Values (SOV)</td>
<td></td>
</tr>
<tr>
<td>Funding Requests/Approvals (FRA &amp; SPFR)</td>
<td></td>
</tr>
<tr>
<td>Cost Reporting, forecasting and actuals</td>
<td></td>
</tr>
<tr>
<td>Budget Change Approval (BCA)</td>
<td></td>
</tr>
<tr>
<td>Integration with Abacus/Simba/Maximo</td>
<td></td>
</tr>
</tbody>
</table>
The Transition

E-Build your PSU Project

JUNE

- LAST Day to SUBMIT
  - Pay Applications
  - Invoices

- e-BUILDER IMPACTS (cost only)
  - Change Orders
  - PCO’s
  - Amendments
  - Consultant Invoices
  - Pay Applications

- E-BUILDER Processes w/ NO Impact
  - After Hours Emergency
  - Bid Addendum
  - Bid Requests
  - Bulletin
  - Correspondence
  - Daily Field Reports
  - Design Decision Request
  - Design Reviews
  - Equipment Data
  - EBUAR
  - EBSR
  - Project Requests
  - Punch List
  - Rolling Completion List
  - RFI
  - Submittals
  - Safety Incident Report
  - Document Folders
  - Meeting Minutes/Action Items

- 6/5
  - 5/28
    - e-BUILDER virtual Town Hall

JULY

- TRAINING VIDEOS available

- 7/7
  - e-BUILDER LIVE
    - Phase II Functionality!

- Cost Management/Contract Administration
  - Project Details Update (PDU)
  - Capital Planning
    - Project fund source allocations/reporting
  - Change Order Execution/Approval (CO)
  - Amendment Execution/Approval (AM)
  - Consultant Invoice Approval (CI)
  - Construction Pay App Approval (CPA)
  - Internal Commitment (IC)
  - Internal Commitment Change Order (ICCO)
  - Contract (CON) / Agreement (AGMT)
    - Request/Execution/Approval
  - Schedule of Values (SOV)
  - Funding Requests/Approvals (FRA & SPR)
  - Cost Reporting, forecasting and actuals
  - Budget Change Approval (BCA)
  - Integration with Abacus/Simba/Maximo
SIMBA ... impact?
Penn State has selected the SAP S/4HANA business system (ERP) to replace its financial and other integrated systems, including Penn State’s legacy Integrated Business Information System (IBIS).

**IMPACT ... New vendor registration requirements ...**

Vendors who will have contracts/agreements direct with PSU must register with SIMBA

All vendors should have received a letter with instructions
Phase TWO Deep Dive ... will soon GO LIVE!
e-Builder Phase 2

THE PENNSYLVANIA STATE UNIVERSITY
What’s new?
## PSU Internal Processes

### Phase 1

<table>
<thead>
<tr>
<th>Project Request</th>
<th>PROJR</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Details Update</td>
<td>PDU</td>
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<tr>
<td>Vendor Registration</td>
<td>VREG</td>
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</tbody>
</table>

### Phase 2

<table>
<thead>
<tr>
<th>Budget Change Approval</th>
<th>BCA</th>
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</thead>
<tbody>
<tr>
<td>Funding Request Authorization</td>
<td>FRA</td>
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<tr>
<td>Special Project Funding Request</td>
<td>SPFR</td>
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<tr>
<td>Internal Commitment</td>
<td>IC</td>
</tr>
<tr>
<td>Internal Potential Change Order</td>
<td>ICPCO</td>
</tr>
<tr>
<td>Internal Change Order</td>
<td>ICCO</td>
</tr>
</tbody>
</table>

### Updated Processes

- **Project Request** (PROJR)
- **Project Details Update** (PDU)
- **Vendor Registration** (VREG)
<table>
<thead>
<tr>
<th>Phase 1</th>
<th>Phase 2</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Amendment - PH1</strong> AMX</td>
<td><strong>Consultant Agreement</strong> AGMT</td>
</tr>
<tr>
<td><strong>Consultant Invoice - PH1</strong> CIX</td>
<td><strong>Consultant Amendment</strong> AM</td>
</tr>
<tr>
<td><strong>Vendor Registration</strong> VREG</td>
<td><strong>Vendor Registration</strong> VREG</td>
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</tbody>
</table>

**NEW →**

**UPDATED →**
<table>
<thead>
<tr>
<th>Phase 1</th>
<th>Phase 2</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>New ➔</td>
</tr>
<tr>
<td></td>
<td>New ➔</td>
</tr>
<tr>
<td>Potential Change Order - PH1</td>
<td>Contractor Schedule of Values</td>
</tr>
<tr>
<td></td>
<td>CON</td>
</tr>
<tr>
<td></td>
<td>Updated ➔</td>
</tr>
<tr>
<td>Change Order - PH1</td>
<td>Contractor Potential Change Order</td>
</tr>
<tr>
<td></td>
<td>PCO</td>
</tr>
<tr>
<td>Contractor Pay App - PH1</td>
<td>Contractor Change Order</td>
</tr>
<tr>
<td></td>
<td>CO</td>
</tr>
<tr>
<td></td>
<td>Updated ➔</td>
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<tr>
<td></td>
<td>Contractor Payment Application</td>
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<tr>
<td></td>
<td>CPA</td>
</tr>
<tr>
<td>Vendor Registration</td>
<td>Vendor Registration</td>
</tr>
<tr>
<td></td>
<td>VREG</td>
</tr>
<tr>
<td></td>
<td>Updated ➔</td>
</tr>
</tbody>
</table>
What’s changing?
What’s changing?

- COST MODULE-ENABLED PROCESSES
- RICHER DATA COLLECTION
- IMPROVED COST REPORTING
**Consultant Invoice (CI)**

**Start Process**
- Project: Process Testing
- Project Number: 000596300
- Process: Consultant Invoice

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

**Instructions:**
- Consultant enters details about the invoice, attaches invoice document using the data field below, and submits the process. Additional supporting documents may be attached in the Attached Documents tab.

---

**Invoice Details**
- Invoice Date
- Period Start Date
- Period End Date
- Basic Services Amount This Invoice
- Reimbursable Expenses
- Total Amount This Invoice
- DBE Amount This Invoice
- Description
- Invoice Number
- Payment Number
- Vendor Invoice Number
- Final Payment
- BM Deliverable
- Invoice Document

**Vendor and Agreement Details**
- Vendor
- Agreement ID
- Vendor Contact
- Vendor Project Number
- Vendor Contact Email

**DBE Section**
- Is there any DBE work to report on this job?
What stays the same?
What stays the same?

- Same e-Builder application
- Same login and project access
- Same Phase 1 processes (mostly)
- Same folder structure
- No need to re-learn existing functionality
New Features
New Features

- Cost Management
- Schedule of Values (SOV)
- Electronic Signatures
- Invoice / Pay Application Efficiencies
Cost Management

Centralized project costs
All process steps in e-Builder
Budgets, commitments, changes, invoices
Projected and pending changes
Forecasts and cash flows
Real-time updates from processes
Reporting
<table>
<thead>
<tr>
<th>Line Item</th>
<th>Description</th>
<th>Original Budget *</th>
<th>Approved Budget Changes</th>
<th>Current Budget</th>
<th>Current Commitments</th>
<th>Non Commitment Costs</th>
<th>In-Flight Commitments</th>
<th>Forecasted Commitments</th>
<th>Indicated Cost *</th>
<th>Surplus/(Deficit) *</th>
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<td>1</td>
<td>DIRECTS (DIRECTS)</td>
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<td>102,500.00</td>
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<td>Purchase Orders (W/C-Building &amp; Construction Services)</td>
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<tr>
<td>102052000020</td>
<td>O&amp;M GTA / DP (CON-Manger at Risk Contracts-O&amp;M)</td>
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<td></td>
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<tr>
<td>104052000010</td>
<td>O&amp;M Services (CON-Manager Agency Contracts O&amp;M)</td>
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<tr>
<td>104052000000</td>
<td>O&amp;M-General (Contractor)</td>
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<td>50,000.00</td>
<td>21,621.00</td>
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<td>1,751.00</td>
<td>40,000.00</td>
<td>(13,874.00)</td>
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<td>105052000060</td>
<td>HVAC (CON-Heating and Ventilation Contractors)</td>
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<td>10,000.00</td>
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<td>Plumbing (CON-Plumbing Contractors)</td>
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<td>10,000.00</td>
<td>10,700.00</td>
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<td>10,721.00</td>
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<td>10,000.00</td>
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<td>OPP-Remodel Services</td>
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<td>120052000030</td>
<td>OPP Landscape Services</td>
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<tr>
<td>120052000080</td>
<td>OPP Utility Services</td>
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<tr>
<td>130052000099</td>
<td>Additional Misc Construction Costs</td>
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<tr>
<td>130052000099</td>
<td>Construction Contingency</td>
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<td>10,000.00</td>
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<td>0.00</td>
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<td>10,950.00</td>
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<td>2</td>
<td>INDIRECTS (SOFTCOSTS)</td>
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<td>20,000.00</td>
<td>(15,000.00)</td>
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<td>All Remodelables (CON-Arch &amp; Engr Two-Contract services)</td>
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<td>2,000.00</td>
<td>950.00</td>
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<td>7,950.00</td>
<td>(6,950.00)</td>
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<td>Design Contingency</td>
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<td>4,000.00</td>
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<tr>
<td>204052000010</td>
<td>Remodeling Services</td>
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<td>0.00</td>
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<tr>
<td>205052000010</td>
<td>Geotechnical Services (CON-Geotech-Design)</td>
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<td>0.00</td>
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<td>0.00</td>
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<td></td>
</tr>
<tr>
<td>206052000010</td>
<td>Testing &amp; Inspections (CON-Geotech-Material Testing &amp; Inspection)</td>
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<td>0.00</td>
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<td>207052000010</td>
<td>Hazardous Material Monitoring &amp; Testing (CON-Hazardous Abatement Monitoring &amp; Testing)</td>
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<td>0.00</td>
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<tr>
<td>208052000010</td>
<td>Surveys (CON-Surveys)</td>
<td>0.00</td>
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<td>0.00</td>
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<td>Totals</td>
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<td>145,200.00</td>
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<td>145,200.00</td>
<td>52,918.00</td>
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<td>31,726.00</td>
<td>126,456.00</td>
<td>18,346.00</td>
</tr>
</tbody>
</table>
Schedule of Values (SOV)

Applies to construction contracts

Not applicable to existing contracts that already have pay apps

CONTRACT  SOV  PAY APP
### Commitment Change Custom Fields

There are no commitment change custom fields.

#### Commitment Change Items

<table>
<thead>
<tr>
<th>#</th>
<th>Commitment Item</th>
<th>Description</th>
<th>Budget Line Item</th>
<th>Retainage Percent</th>
<th>Current Commitment Amount</th>
<th>Change Amount</th>
<th>New Commitment Amount</th>
<th>Spec Section</th>
<th>Description</th>
<th>Company</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>001</td>
<td><strong>HVAC (CDN: Heating and Ventilation)</strong></td>
<td>100052900620</td>
<td>6.00</td>
<td>0.00</td>
<td>50,000.00</td>
<td>0.00</td>
<td>50,000.00</td>
<td>23 00.00 Heating, Ventilating and Air Conditioning (HVAC)</td>
<td><strong>Central HVAC Equipment</strong></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Total**: 50,000.00

#### Add Additional Scope Commitment Item

- **Item Number**: 001
- **Account Code**: Please select a line item
- **Commitment Item**: Please select a line item
- **Description**: Please select a line item
- **Retainage Percent**: 6.00
- **Change Amount**: 0.00
- **Custom Fields**:

---

**AutoSave**:

**ScheduleOfValues_ProcessTesting_003002_20309574840.xlsx** - Compatibility Mode - Excel

**Search**:

**Insert**:
- Draw
- Page Layout
- Formulas
- Data
- Review
- View
- Developer
- Add-ins
- Help

**Data Tools**:
- Acrobat
- Insert
- Delete
- Format

**Data Options**:
- Sort & Filter
- Filter & Select
- Find & Select
- Ideas
- Sensitivity
Electronic Signatures

Electronic signatures for agreements, contracts, amendments, change orders

Integrated into process steps

Sign from anywhere

Reduced time and cost associated with hard copies

Secure, encrypted

Person with legal authority to sign must be an e-BUILDER user on the project!
Take action, as usual.
Click link to review and sign document.

Watch video if you need help.
Click Continue to view and sign document.
Drag-drop signature onto document.

First time users must perform initial setup. It’s easy!
Click Finish to complete.
Upon success, continue with the action.
Invoice / Pay App Efficiencies

- All review steps in one system
- Vendors can see status and details anytime
- SIMBA direct deposit available
Training
Training

All training will be on-demand
Videos linked from processes
Website with all training content
Just-in-time training
Live “office hours”
PSU user manuals

Under development and available now!

sites.psu.edu/ebuildertraining
Support
Support

E-BUILDER HELP
E-BUILDER SUPPORT
PENN STATE USER GUIDES
PENN STATE EBSR PROCESS
e-Builder Help

Readily available
Context-sensitive
Great for general functionality
e-Builder Support

support@e-builder.net

(888) 288-5717

M-F 6:00 AM to 8:00 PM ET

Critical incidents supported 24/7

e-Builder Community Portal

e-Builder Trust Center
Penn State User Guides

Link from Home tab
- https://tinyurl.com/PSUMANUALS

PSU-specific guides
Detailed, step-by-step instructions
More screenshots!
Penn State EBSR Process

Monitored by PSU e-Builder Admin team
- Jessica Dubler
- Michelle McMullen

PSU-specific process knowledge

Automated logging, status tracking
This implementation will not be easy and there will be bumps in the road. We ask for your patience and guidance in making e-Builder a success.
Make it Better …

Continuous IMPROVEMENT …

PSU OPP

e-Builder®
A TRIMBLE COMPANY

Innovation GROUP

INNOVATE

YOU!