

Tasks by Role

Project Manager		Financial Manager	
Step	Task	Step	Task
1.	Log in to the FCPWeb.	2.	Log in to the FCPWeb.
Project Phase: Pre-Planning			
3.	Edit Project Information (Initial Project Version Auto-created).	4.	Enter Fund Sources.
5.	Enter a Preliminary Project Budget.		
6.	Enter a Preliminary Schedule.		
7.	Update the Project's Status.		
Project Phase: Planning			
8.	Enter a Milestone Schedule.	9.	Enter Project Charge Account(s) [C-FOPs].
10.	Update the Project Budget.		
11.	Version the Project Budget & Schedule.* (Project Approval)		
12.	View and Use Reports.		
Project Phase: PSC Selection			
13.	Update Project Status.	14.	Enter and Encumber PSC Agreements.
15.	Update Project Budget & Schedule.	16.	View and Use Reports.
Project Phase: Design			
17.	Update Project Status.	18.	Enter PSC Payments.
19.	Enter PSC Amendments.	20.	Encumber PSC Amendments.
21.	Update Project Budget & Schedule.	22.	Reconcile AE Payments.
Project Phase: Bid & Award			
23.	Update Project Status.	24.	Enter and Encumber Construction Contracts.
25.	Update Project Budget & Schedule.	26.	Manage Insurance Certificates.
27.	Version Project.* (Architect's Final Estimate)		
Project Phase: Construction			
28.	Update Project Status.	29.	Enter Contractor Payments.
30.	Enter RFPs & Change Orders.	31.	Enter Approved Change Orders.
32.	Enter Liens & Claims.	33.	Enter Miscellaneous Costs.
34.	Update Project Schedule.	35.	Enter Retainer Contracts.
		36.	Enter Payments Against Retainer Contracts.
		37.	Approve Lien & Claim Releases.
		38.	Release Retainage.
Project Phase: Warranty			
39.	Update Project Status.		
Project Phase: Close-Out			
40.	Update Project Status.		
41.	Enter Building Number in the PDS.		
42.	Enter the Actual End Date in the Punchlist		
43.	Enter the Actual End Date in the Final Closeout	44.	Close out the project. **

Continue...

Additional Information:

- * Project Revision & Authorization Required – Only Directors can authorize projects. Projects are versioned and authorized at Project Creation (Initial Version), Project Approval, Architect's Final Estimate, or for Budget and Schedule Revisions. The Project will be locked for editing until final approval is done.
- ** The Financial Manager cannot close out the project until the Director has initiated closeout.