Purpose and Process

- The Project Milestone BP tracks the milestones for the entire life of the project.
- The data collected is used to run reports for calculating metrics.
- The Project Milestone BP should be continuously updated throughout the life of the project.
- One Project Milestone record should be created for each building or demo building project.
- This BP is housed under Data Manager and is a non-workflow record.
Project Milestone Creation

- In Oaks CI navigate to:
  - Data Manager -> Project Milestone
  - Click New
Complete Upper Form

- Fill out all information in the General section
- **Note:** The “Stage” box should be updated as needed throughout the project.
Complete Upper Form

- Fill out all date information in the **Project Dates** section

<table>
<thead>
<tr>
<th>PROJECT DATES</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Project Start</strong></td>
</tr>
<tr>
<td><strong>Project End</strong></td>
</tr>
<tr>
<td><strong>Planned</strong></td>
</tr>
<tr>
<td><strong>Revised</strong></td>
</tr>
<tr>
<td><strong>Actual</strong></td>
</tr>
</tbody>
</table>

Create New Project Milestone - Project No. SFC-130336 - Internet Explorer

```
Project Dates
Project Start = Date procurement activities start (ie: PM drafts RFQ) or date AE RFQ posted. Project End = Date that final vendor’s Contract Completion Certificate is executed and AE final payment made.
Planned Project End: 07/28/2017 07/28/2017
```

Design Milestones
Design Start = Date of Commencement of Services for AE (G-AE on DB projects) Design End = Date of Notice to Proceed of first package of work
Planned Design End: 07/28/2017 07/28/2017
```
Note: Once you have entered the Actual Project End date in the Project Dates section, change the Status and Stage in the General section to “Completed”
Complete Upper Form

- Fill out all date information in the **Design Milestones** section

<table>
<thead>
<tr>
<th>DESIGN MILESTONES</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Design Start:</strong></td>
</tr>
<tr>
<td><strong>Design End:</strong></td>
</tr>
<tr>
<td><strong>Planned</strong></td>
</tr>
<tr>
<td><strong>Revised</strong></td>
</tr>
<tr>
<td><strong>Actual</strong></td>
</tr>
</tbody>
</table>

![Webpage Screenshot](image-url)
Complete Upper Form

- Fill out all date information in the **Construction Milestones** section

<table>
<thead>
<tr>
<th>Construction Milestones</th>
</tr>
</thead>
<tbody>
<tr>
<td>Construction Start</td>
</tr>
<tr>
<td>Substantial Completion</td>
</tr>
<tr>
<td>Construction End</td>
</tr>
</tbody>
</table>

**Planned**
- First entry should be based on dates entered in the AE RFQ.
- May be updated at the following times (if applicable):
  - When the Design Schedule and Project Schedule are first approved
  - At time of GMP approval if a CMR/DB project
  - Zero Dollar change orders dealing with weather delays

**Revised**
- For data reporting purposes - always fill in. First entry should match the planned dates. Update quarterly or when a substantial change is known (Design, Bidding, Construction and Owner Delays).

**Actual**
- Remains blank until the event has occurred. Update once milestone is achieved.
Complete Lower Form

- Use the lower form, **Additional Milestones**, for additional milestones for each public bid or GMP in project.
- Click Add
- Choose Detail or Summary Line Item
Complete Lower Form

› Fill out line item information
› Click OK
Complete Lower Form

- Line Items will show up in the Additional Milestones section
Finish Editing

- When you’re finished entering all information or updating the record, click Finish Editing

- **Reminder:** The Milestone record should be updated throughout the project as necessary.