



# Project Milestone

## K-12 Legacy

# Purpose and Process

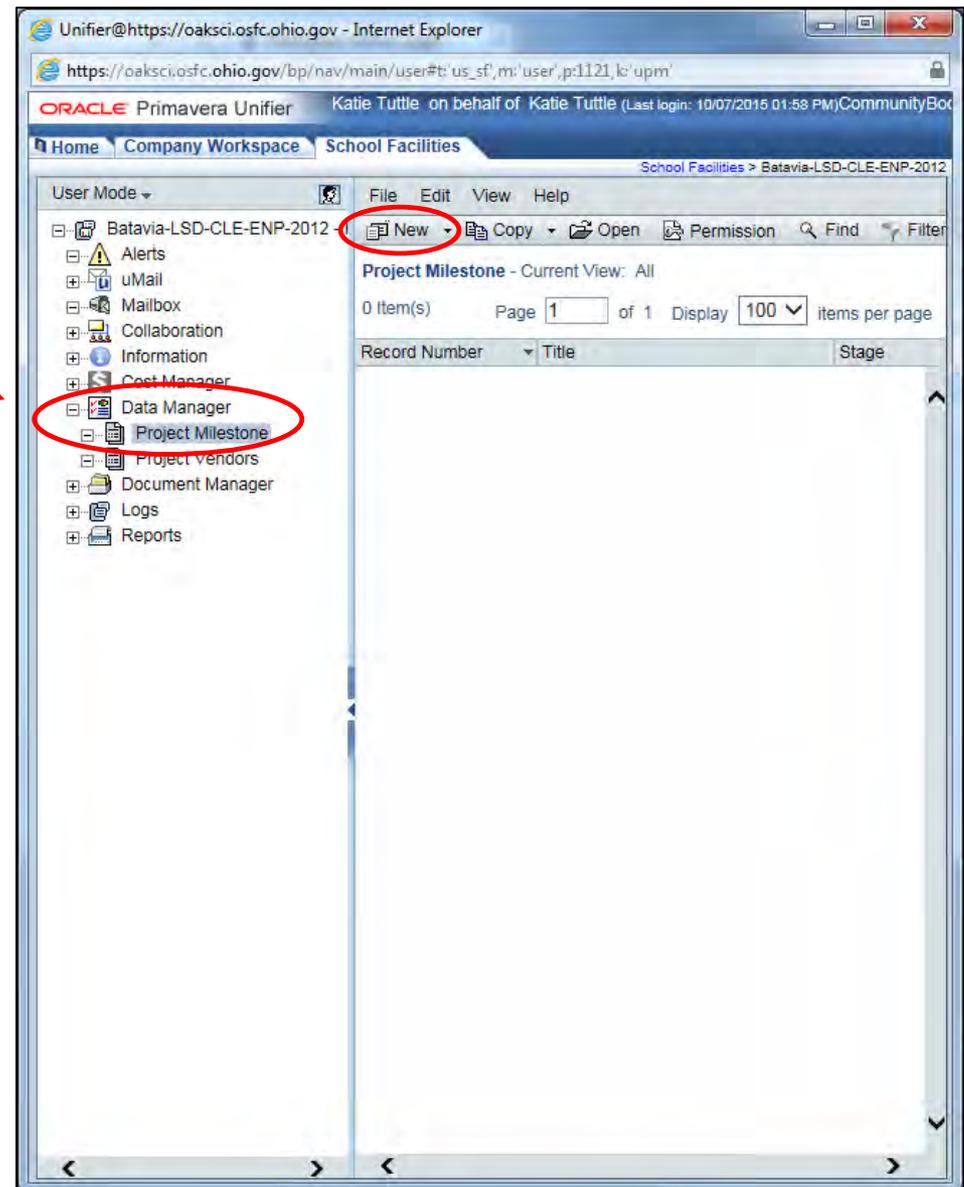
- ▶ The Project Milestone BP tracks the milestones for the entire life of the project.
- ▶ The data collected is used to run reports for calculating metrics.
- ▶ The Project Milestone BP should be continuously updated throughout the life of the project.
- ▶ One Project Milestone record should be created 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.

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

https://oaksci.osfc.ohio.gov/bp/studio/bp/checkPermission?model=upm&a=form.0&b=upm&bpcsvimport=0&project\_id=1121

File Edit View Help

Finish Editing Save Spelling Add Attachment Close Window

**General** Project Milestone

General

Organization: Batavia LSD Record Number:

Project Number: SFC-130336 Creator: Katie Tuttle

Project Name: Batavia-LSD-CLE-ENP-2012 Creation Date:

Project Location:

Title: K-12 Milestone Project Status: Active \*

Project Phase: 50 Stage: Design

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 Start:  Revised Project Start:  Actual Project Start:

Planned Project End:  Revised Project End:  Actual Project End:

Design Milestones

Design Start = Date of Commencement of Services for AE (C-AE on DB projects) Design End = Date of Notice to Proceed of first package of work

Planned Design Start:  Revised Design Start:  Actual Design Start:

Planned Design End:  Revised Design End:  Actual Design End:

Construction Milestones

Construction Start = Date of Notice to Proceed of first package of work. Substantial Completion = Date of Notice of Substantial Completion. Construction End = Date of final vendor's Contract Completion Certificate is executed.

Planned Construction Start:  Revised Construction Start:  Actual Construction Start:

Planned Substantial Completion:  Revised Substantial Completion:  Actual Substantial Completion:

Planned Construction End:  Revised Construction End:  Actual Construction End:

Additional Milestones

Attachments (0) Linked Records (0) General Comments Linked Mail (0)

# Complete Upper Form

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

PROJECT DATES	
Project Start	Date AE RFQ is posted.
Project End	Date that final vendor's Contract Completion Certificate is executed and AE final payment is made
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.

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

https://oaksci.osfc.ohio.gov/bp/studio/bp/checkPermission?model=upm&a=form.0&b=upm&bpcsvimport=0&project\_id=1121

File Edit View Help

Finish Editing Save Spelling... Add Attachment Close Window

**General** Project Milestone

**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 Start: 07/28/2016 Revised Project Start: 07/28/2016 Actual Project Start:

Planned Project End: 07/28/2017 Revised Project End: 07/28/2017 Actual Project End:

**Design Milestones**

Design Start = Date of Commencement of Services for AE (C-AE on DB projects) Design End = Date of Notice to Proceed of first package of work

Planned Design Start:  Revised Design Start:  Actual Design Start:

Planned Design End:  Revised Design End:  Actual Design End:

# Update Status and Stage

- ▶ **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”

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

https://oaksci.osfc.ohio.gov/bp/studio/bp/checkPermission?model=upm&a=form.0&b=upm&bpcsvimport=0&project\_id=1121

File Edit View Help

Finish Editing Save Spelling Add Attachment Close Window

### Project Milestone

**General**

General

Organization: Batavia LSD Record Number:

Project Number: SFC-130336 Creator: Katie Tuttle

Project Name: Batavia-LSD-CLE-ENP-2012 Creation Date:

Project Location:

Title: K-12 Milestone Project

Project Phase:  50

Status: Completed

Stage: Completed

**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 Start: 07/28/2016 Revised Project Start: 07/28/2016 Actual Project Start: 08/17/2016

Planned Project End: 07/28/2017 Revised Project End: 07/28/2017 Actual Project End: 09/08/2016

**Design Milestones**

Design Start = Date of Commencement of Services for AE (C-AE on DB projects) Design End = Date of Notice to Proceed of first package of work

Planned Design Start:  Revised Design Start:  Actual Design Start:

Planned Design End:  Revised Design End:  Actual Design End:

**Construction Milestones**

Construction Start = Date of Notice to Proceed of first package of work. Substantial Completion = Date of Notice of Substantial Completion. Construction End = Date of final vendor's Contract Completion Certificate is executed.

Planned Construction Start:  Revised Construction Start:  Actual Construction Start:

Planned Substantial Completion:  Revised Substantial Completion:  Actual Substantial Completion:

Planned Construction End:  Revised Construction End:  Actual Construction End:

**Additional Milestones**

Attachments (0) [Linked Records \(0\)](#) [General Comments](#) [Linked Mail \(0\)](#)

# Complete Upper Form

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

DESIGN MILESTONES	
Design Start:	Date of Notice to Commence Services for AE or C-AE
Design End	Date of Notice to Proceed on 1st package of work
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.

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

https://oaksci.osfc.ohio.gov/bp/studio/bp/checkPermission?model=upm&a=form.0&b=upm&bpcsvimport=0&project\_id=1121

File Edit View Help

Finish Editing Save Spelling... Add Attachment Close Window

**Project Milestone**

**General**

**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 Start: 07/28/2016 Revised Project Start: 07/28/2016 Actual Project Start: 08/17/2016  
Planned Project End: 07/28/2017 Revised Project End: 07/28/2017 Actual Project End: 09/08/2017

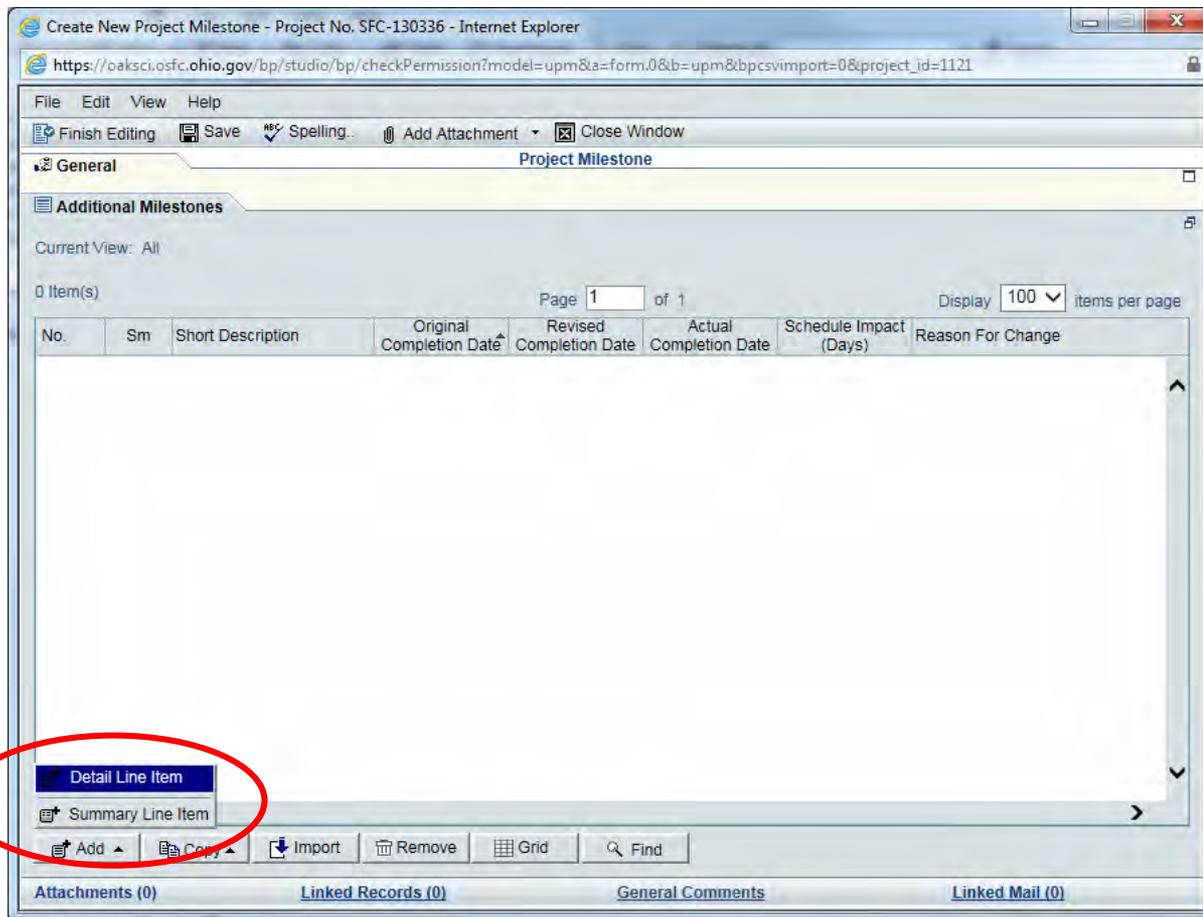
**Design Milestones**  
Design Start = Date of Commencement of Services for AE (C-AE on DB projects) Design End = Date of Notice to Proceed of first package of work

Planned Design Start: 07/28/2016 Revised Design Start: 07/28/2016 Actual Design Start:   
Planned Design End: 07/28/2017 Revised Design End: 07/28/2017 Actual Design End:



# 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



Current View: All

0 Item(s) Page 1 of 1 Display 100 items per page

No.	Sm	Short Description	Original Completion Date	Revised Completion Date	Actual Completion Date	Schedule Impact (Days)	Reason For Change
-----	----	-------------------	--------------------------	-------------------------	------------------------	------------------------	-------------------

**Detail Line Item**

Summary Line Item

Add Copy Import Remove Grid Find

Attachments (0) Linked Records (0) General Comments Linked Mail (0)

# Complete Lower Form

- ▶ Fill out line item information
- ▶ Click OK

Line Item - Internet Explorer

https://oaksci.osfc.ohio.gov/bp/studio/bp/database/itemopen?a=form.0&id=0&model=upm&schemaic

Spelling... Attach Delete Line Item

**Project Milestone Line Item:**

Include additional milestones for each public bid and GMP in project. Bid Date = date of public bid opening. GMP Date = date of GMP Meeting that reached agreement.

Short Description: Early Site Work Construction Start

Milestone Type: Construction - Construction Start

Original Completion Date: 11/28/2016

Revised Completion Date: 03/28/2017

Actual Completion Date:

Schedule Impact (Days): 0

Reason For Change:

Notes

Notes:

Attachments (0) [Linked Records \(0\)](#)

OK Cancel

# Complete Lower Form

- Line Items will show up in the Additional Milestones section

The screenshot shows a web browser window titled "Create New Project Milestone - Project No. SFC-130336 - Internet Explorer". The URL is [https://oaksci.osfc.ohio.gov/bp/studio/bp/checkPermission?model=upm&a=form.0&b=upm&bpcsvimport=0&project\\_id=1121](https://oaksci.osfc.ohio.gov/bp/studio/bp/checkPermission?model=upm&a=form.0&b=upm&bpcsvimport=0&project_id=1121). The application interface includes a menu bar (File, Edit, View, Help) and a toolbar with options like Finish Editing, Save, Spelling, Add Attachment, and Close Window. The main content area is titled "Project Milestone" and has tabs for "General" and "Additional Milestones". The "Additional Milestones" tab is active, showing "Current View: All" and "1 Item(s)". A table displays the milestone data, with the first row highlighted by a red box. A red arrow points to the "Reason For Change" column header.

No.	Sm	Short Description	Original Completion Date	Revised Completion Date	Actual Completion Date	Schedule Impact (Days)	Reason For Change
001		Early Site Work Constructio	11/28/2016	03/28/2017		0	

At the bottom of the application, there are buttons for Add, Copy, Import, Remove, Grid, and Find. The footer shows "Attachments (0)", "Linked Records (0)", "General Comments", and "Linked Mail (0)".

# 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.

Current View: All

1 Item(s) Page 1 of 1 Display 100 items per page

No.	Sm	Short Description	Original Completion Date	Revised Completion Date	Actual Completion Date	Schedule Impact (Days)	Reason For Change
001		Early Site Work Construction	11/29/2016	03/28/2017		0	