



GEORGE MASON UNIVERSITY ON-SITE DISCOVERY AGENDA



DATES	September 19 to 21, 2017 FACILITIES ADMINISTRATION, ROOM 102			All sessions will be online via WebEx at https://goo.gl/ndEDgJ or go to https://webex.gmu.com and enter in meeting id 646 515 445. <i>Please save any questions to the end of the presentation.</i>
E-BUILDER TEAM	Susan Parker Sr. Business Analyst	JC Rojas Business Analyst	Jamie Cooke Project Manager	

TUESDAY SEPTEMBER 19TH, 2017

Topic	Start	Finish	Description
CORE TEAM MEETING	8:30 AM	10:30 AM	<p>Introductions and review of agenda.</p> <p>Review the project objectives and implementation methodology for Champion and Executive confirmation</p> <p>Discuss goals and vision to ensure a successful adoption</p> <p>Review and confirm the proposed schedule</p>
BREAK	10:30 AM	10:45 AM	
E-BUILDER OVERVIEW	10:45 AM	12:00 PM	High-level walkthrough of e-Builder features. ALL STAFF WELCOME.
LUNCH	12:00 PM	1:00 PM	
ROLES, USERS, PERMISSIONS	1:00 PM	2:15 PM	Discuss the concept of roles and develop a list of GMU roles. Associate users to their roles and assign role permissions.
PROJECTS & CUSTOM FIELDS	2:15 AM	3:15 PM	Review information provided by the Client. What defines a “project” for GMU? Which projects will be managed in e-Builder? Define the steps in creating a Project. Develop a list of project custom fields based on project attributes, location, and key stakeholders.
BREAK	3:15PM	3:30PM	
COMPANIES/CONTACTS	3:30 PM	4:00 PM	Identify GMU procedures for adding and updating Companies and Contacts.
SCHEDULING	4:00 PM	4:45 PM	Understand how GMU currently manages Construction Schedules.
WRAP UP/OVERFLOW	4:45 PM	5:00 PM	Review action items identified during session

WEDNESDAY SEPTEMBER 20TH, 2017

Topic	Start	Finish	Description
AGENDA REVIEW	8:30 AM	8:45 AM	Review of agenda and objectives
COST OVERVIEW AND ACCOUNT CODES	8:45 AM	10:00 AM	Cost Overview. Discuss current account code structure and intended structure in e-Builder.
BREAK	10:00 AM	10:15 AM	
BUDGETS/BUDGET CHANGES	10:15 AM	12:00 PM	Discuss how GMU budgets are currently managed. Understand GMU process for Budget Changes. Develop a list of Budget Change reason codes.
LUNCH	12:00 PM	1:00 PM	
COMMITMENTS/CHANGES	1:00 PM	2:30 PM	Review GMU obligations (PO's/TOs/Contracts) and how are these currently managed. Develop a list of Commitment Change reason codes. Discuss current procedure for Change Orders and Amendments.
BREAK	2:30 PM	2:45 PM	
INVOICE APPROVAL – COMMITTED AND NON-COMMITTED	2:45 PM	4:00 PM	Discuss how GMU invoices (Pay Apps and actuals) are managed. Identify any non-committed invoices (e.g. Permits) and understand how these are processed.
COST SETTINGS	4:00 PM	4:45 AM	Review cost controls settings
WRAP UP	4:45 PM	5:00 PM	Review action items identified during session

THURSDAY SEPTEMBER 21ST, 2017

Topic	Start	Finish	Description
AGENDA REVIEW	8:30 AM	8:45 AM	Review of agenda.
SOV IMPORT TOOL	8:45 AM	9:30 AM	Discuss SOV Import Tool requirements
SUBMITTALS	9:30 AM	10:15 AM	Understand GMU procedure for processing Submittals - product data, samples, calculations, shop drawings - coming from the subcontractors and going to the A/E team for approval prior to material ordering.
BREAK	10:15 AM	10:30 AM	
PLANNING	10:30 AM	11:00 AM	Review GMU current CIP plan.
CALENDAR	11:00 AM	11:30 AM	Determine GMU frequent meeting types and determine common meeting locations settings. Assess if GMU will write meeting minutes in e-Builder.
FORMS	11:30 AM	12:00 PM	Review Forms provided by Client. Discuss standard Forms in e-Builder and how they're managed in the system.
LUNCH	12:00 PM	1:00 PM	
PROCESSES	1:00 PM	2:30 PM	Identify a list of potential workflow processes.
BREAK	2:30 PM	2:45 PM	
FOLDER STRUCTURE & PERMISSIONS	2:45 PM	3:30 PM	Discuss File Management in e-Builder. Review GMU current archiving system.
REPORTS & DASHBOARDS	3:30 PM	4:30 PM	Review the reports provided by the Client. Determine the reports e-Builder will configure for GMU.
OVERFLOW/WRAP UP	4:30 PM	4:45 PM	Review action items and next steps.