CP Tracker

CP Tracker

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CP Tracker Introduction

Welcome to CP Tracker

CP Tracker is a user-friendly way to track any "Certificate to Proceed" request along with their workflow progress. The application allows the eligible staff to create new CP Requests and submit for approval. Any logged-in user can get a quick status of where a CP Request is and at which stage, using the reporting feature. This user manual demonstrates the usage of the CP Tracker Application to create and manage CP Request.

CP Tracker

CP Tracker Login

DDC computers will have an icon as 📊 on the desktop, which will open the CP Tracker when double-clicked. From Non DDC devices, open your web browser and type this URL **https://ddcapplications.ddc.nycnet/cptracker** to access CP Tracker. Then an authentication popup will appear as below, where you need to enter your username and password. You will also be able to access CP Tracker through DDC Anywhere.

NYC | Department of Design and Construction   311 | Search all NYC.gov websites

DDC ANYWHERE

NYC DDC Department of Design and Construction

Log in to DDC Anywhere

👤   Username

🔒   Password

➜ **LOG IN**

DDC Anywhere is a central resource for providing information and tools that help us engage with the communities and agencies we serve. Through DDC Anywhere, we can collaborate with sponsor agencies and partner companies that share in the design, construction and renovation of civic facilities and surrounding infrastructure. We look forward to your participation and invite you to stay connected with us via the social media links above.

💡 **Quick Tip**

If the app does not accept your user name, please use, **ddc.nycnet\username**

Directory of City Agencies	Contact NYC Government	City Employees
Notify NYC	CityStore	Stay Connected
NYC Mobile Apps	Maps	Resident Toolkit

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External Access

DDC ANYWHERE

1. Enter https://ddcanywhere.nyc into your browser
2. Username: enter your agency email address
3. Password: enter your agency network password
4. If the credentials does not work enter the credentials supplied by DDC

Internal Access

NYC DDC Hub

1. Open the DDC Hub
2. Click on the waffle icon ▦
3. Click on the CP Tracker logo

CP Tracker

Post Login

Below are the possible operations a staff can perform after successfully logged-in, based on their role.

- On successful login, you will be taken to the CP Tracker homepage
- For Project Managers (Public Buildings) or Senior Project Managers (Infrastructure), there will be an option to create a new CP Request, which will not be available for other users
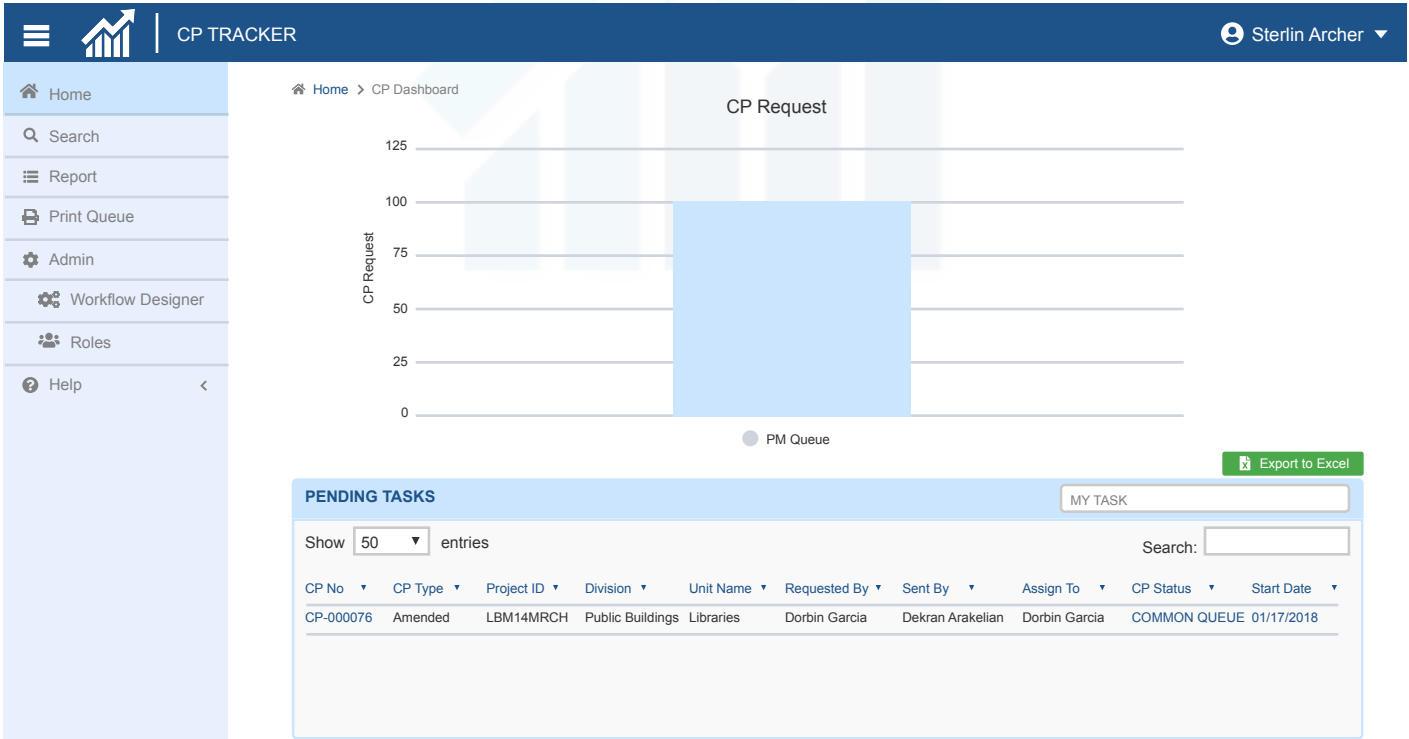- All the users can perform a search for CP requests, based on various search parameters
- All the users can execute a report to see all the CP requests within their division along with the duration of each CP request at various queues.
- From homepage and from search results page, there is an option to export the list of CP requests to MS Excel (available for all the user roles)
- All the staffs can see all the CP Request that are in the Print Queue status
- Other than PMs, SR. PM, CBA and Administrators staffs, all other staffs will have an option to re-assign task (a CP Request) to another corresponding staff to continue the workflow in case if a staff is unavailable

This is the homepage for Project Managers (Public Buildings) or Senior Project Managers (Infrastructure) with an option to create a new CP Request

| ☰ | 📈 | CP TRACKER | | | | | 👤 Sterlin Archer ▼ |

| Home |
| Search |
| Report |
| Print Queue |
| Admin |
| ⚙ Workflow Designer |
| 👥 Roles |
| ❓ Help |

🏠 Home > CP Dashboard

CP Request

PENDING TASKS

Show 50 entries

CP No ▼	CP Type ▼	Project ID ▼	Division ▼	Unit Name ▼	Requested By ▼	Sent By ▼	Assign To ▼	CP Status ▼	Start Date ▼
CP-000076	Amended	LBM14MRCH	Public Buildings	Libraries	Dorbin Garcia	Dekran Arakelian	Dorbin Garcia	COMMON QUEUE	01/17/2018

05

Post Login Details

Top Header - The top header section consists of the menu bar, CP Tracker logo and the profile account label / icon

- ☰ Menu bar - Allows the users to expand and collapse the side navigation
- 📈 CP Tracker Logo - Allows the users to navigate to the home screen
- 👤 Account Profile - This icon will allow users to navigate to their account profile page

Left Navigation Bar - The left navigation bar allows the users to navigate through different sections of the applications

- 🏠 Home - This icon allows you users to navigate back to the CP Tracker Dashboard
- 📄 New CP Request - This icon allows Projects Managers (Public Buildings) or Senior Project Managers (Infrastructure) to create new CP's
- 🗄 Reassign Task - This icon allows staff other than PMs, Sr. PM, CBA and Administrators to re-assign new task
- 🔍 Search - This icon allows users to search for CP Request
- ☰ Report - This icon allows user to view the "Days In Each Queue" report and also export the report into a spreadsheet
- 🖨 Print Queue - This icon allows the user to view any CPs that are in the Print Queue status
- ❔ Help - This icon will allow users to open the user manual for CP Tracker

CP - Dashboard
- CP-Request Graph - Graph shows the users how many CP requests are in PM Queue
    - Allows users to view the chart that shows how many CP Requests are in PM Queue
- Pending Task -
    - Users an opt to see 50, 100, 250 or all CP request using this filter
    - You can click on any of the column headers to sort the list in either ascending or descending order
    - Clicking the CP-Request number will open the CP Request form
    - Clicking the CP Request Status will display the Workflow as in progress
    - My task, by default, CP Request created by (or) assigned to the PM are listed. Alternatively PM can view all tasks within their division
    - Search, allows users to for a CP Request and filter the list that is provided
- Export to Excel
    - This button allows the user to export the table into a spreadsheet.

CP Tracker

Workflow Progress of a CP Request

Clicking on "CP Status" from any list view will display the workflow progress of that CP Request, as shown below.

Workflow Progress

🟦 Completed 🟩 Current ⬜ Not Started

| 06/06/2019 Sr. PM Queue | 06/06/2019 Budget Director Common | 06/06/2019 Deputy Budget Director | 06/06/2019 CBA Queue | 06/06/2019 Dep. Budget Dir. Approval | 06/06/2019 Budget Director Approval | 06/06/2019 Exec Director Queue | 06/06/2019 CFO Queue | 06/06/2019 Print Job | 06/10/2019 Sent to OMB |
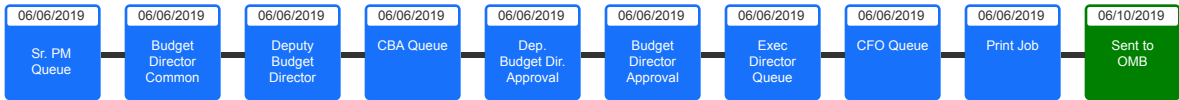
TASK	CP STATUS	START	COMPLETED	COMPLETED BY	NOTES
🔴 PENDING	9.0 Print CP	06/06/2019			
✅ COMPLETED	8.0 Submitted for CFO Approval date	06/06/2019	06/06/2019	Chandini Tadiparthi	(Completed by Proxy User: Venkata Moram on behalf of Chandini Tadipathi
✅ COMPLETED	6.0 In Executive Dir Queue for approval	06/06/2019	06/06/2019	Srinivasa Rao Pinisetty	(Completed by Proxy User: Venkata Moram on behalf of Srinivasa Tao Pinisetty
✅ COMPLETED	7.0 In Executive Dir Queue for approval	06/06/2019	06/06/2019	Srinivasa Rao Pinisetty	(Completed by Proxy User: Venkata Moram on behalf of Srinivasa Tao Pinisetty
✅ COMPLETED	5.0 In Dep Dir Queue - For approval	06/06/2019	06/06/2019	Dekran Arakelian	(Completed by Proxy User: Venkata Moram on behalf of Dekran Arakelian
✅ COMPLETED	4.0 In CBA Queue	06/06/2019	06/06/2019	Vanessa Tousaint	(Completed by Proxy User: Venkata Moram on behalf of Vanessa Tousaint
✅ COMPLETED	1.0 In PM Queue - Rejected by CBA	06/06/2019	06/06/2019	Jacqueline Abel	(Completed by Proxy User: Venkata Moram on behalf of Jacqueline Abel
✅ COMPLETED	4.0 In CBA Queue	06/06/2019	06/06/2019	Vanessa Toussaint	Memo needs to be amended and funding request is missing
✅ COMPLETED	3.0 In Dep Dir Queue - For CBA Asignment	06/06/2019	06/06/2019	Dekran Arakelian	
✅ COMPLETED	2.0 COMMON QUEUE	06/06/2019	06/06/2019	Dekran Arakelian	

💡 **Quick Tip**

✅ This icon displays that the list of task has been completed

CP Tracker

Workflow Progress of a CP Request - Non-PMs

The homepage for staffs other than PMs, Sr. PM, CBA and Administrators Staffs will look as shown in the below picture

- There is no option to create a new CP Request for users other than PMs and Sr. PMs
- Clicking the Export to Excel button, allows users to export the list to Microsoft Excel

Quick Tip

- The graph shows how many CP Request are in the workflow, at various queues

- Clicking the blue links or the bar graph will display the graph at queue-level and further till status-level
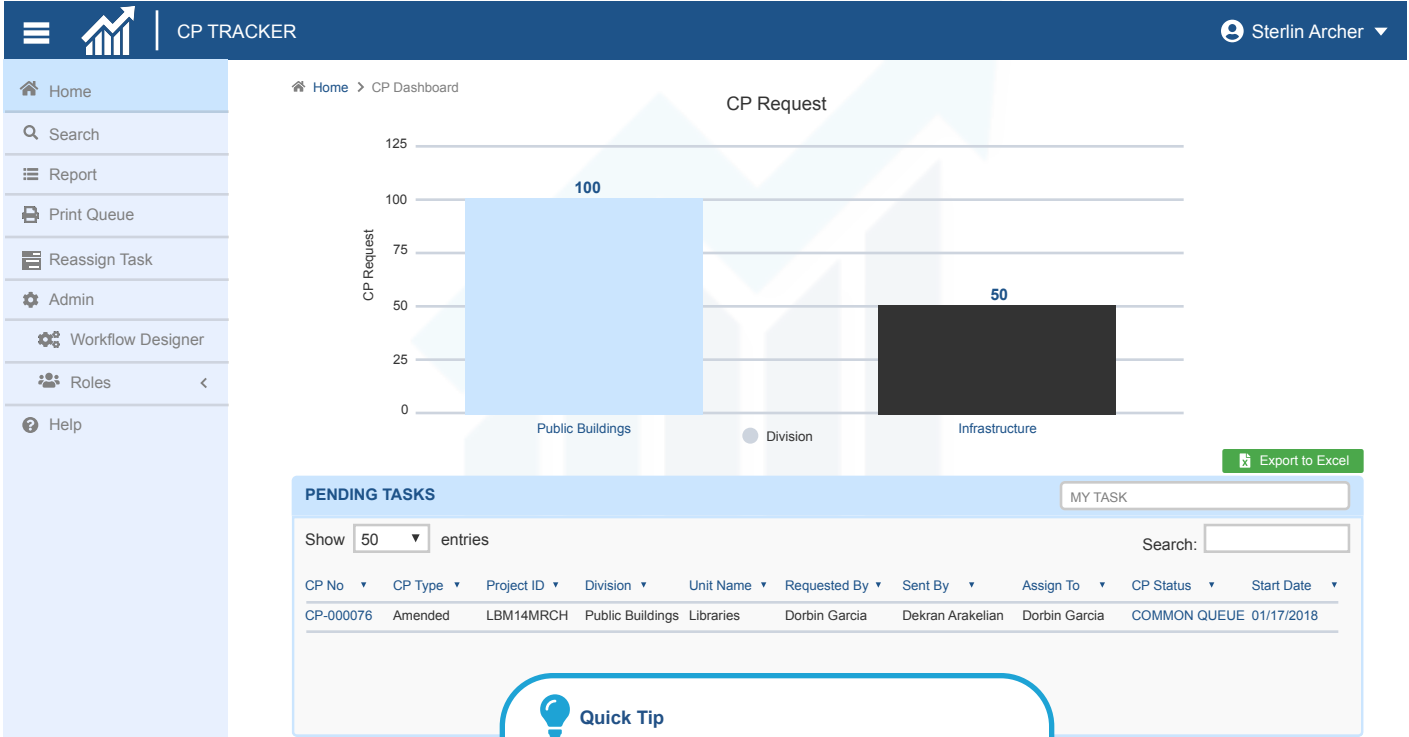
User Roles

The chart will vary based on the logged-in user role and queues. The below chart is for a CBA with CP requests in 3 different queues.

- Adminstrators
- Budget Director
- CBA
- CFO
- Deputy Director
- Executive Director
- Executive Leadership
- PA Borough Diretor
- PA Borough Deputy Director
- Project Manager (PM)

- Print Job
- Program Director
- Sr. Project Manager (PM)
- Supervisor

CP Request

CBA Queue	Send to OMB	Sent to OMB
100	125	50

CP Request (y-axis): 0, 25, 50, 75, 100, 125

● Queue
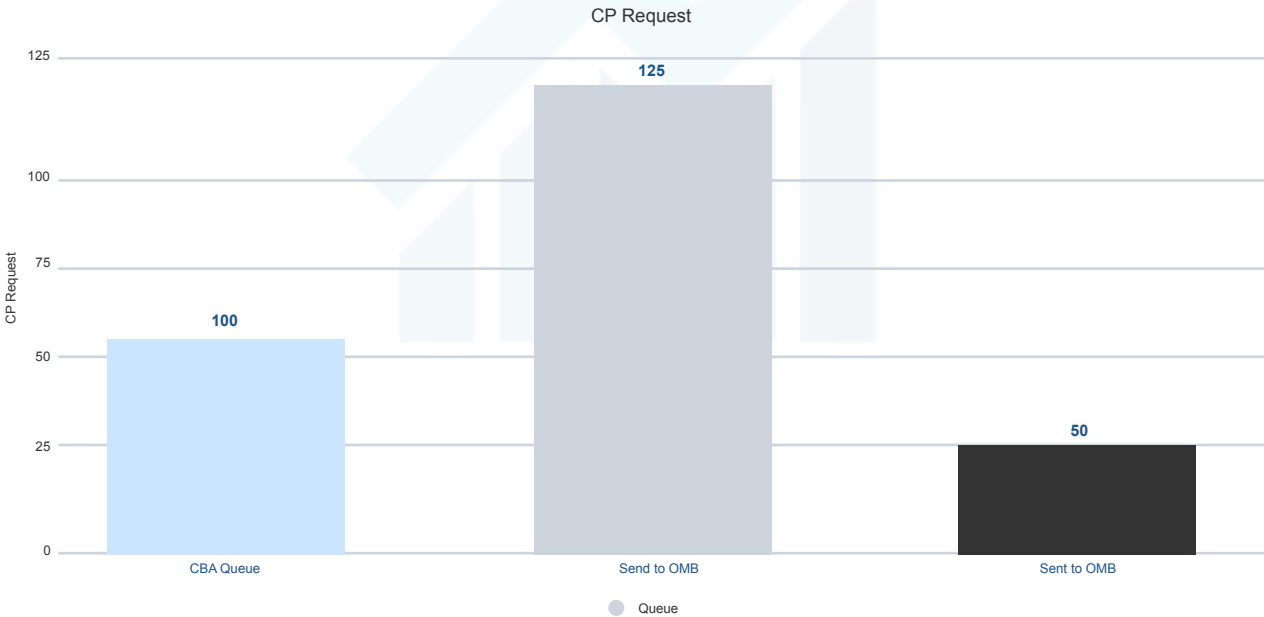
💡 **Quick Tip**

Clicking any of the bar graph links will display the status of the particular section the users are trying to view

CP Tracker

Search & Results

Users can perform a search for CP Request based on the search criteria, by clicking on "Search" from the homepage

- All the fields are optional
- Users have the ability to export the list to Microsoft Excel by click the "Export to Excel" button
- Users can toggle between grid view and tracker view by clicking the specific tab

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🏠 Home › Search

CP Tracker Advanced Search

CP #	FMS #	Request Form	To
Enter CP Number	Enter FMS Number	__ / __ / __	__ / __ / __

CP Type	CP Status	Procurement Type	☐ Blanket CP
ALL	ALL	ALL	

Division	Unit	Role	User	Funding Type
ALL	Select	ALL	ALL	ALL

RESET   SEARCH

📊 Export to Excel

Grid View | Tracker View

Show [50 ▼] entries   Search: [   ]

Rec No ▼	CP Type ▼	FMS ID ▼	Client Agency ▼	Division ▼	Unit Name ▼	Requested By ▼	CP Status ▼	Start Date ▼	Days ▼
CP-000076	NEW	LBM14MRCH	Dept of environmental protection	Infrastructure	Queens	Dekran Arakelian	In Sr. PM Queue-Rejected	06/06/2019	13
CP-000049	NEW	LBM14MCCH	Dept of environmental protection	Infrastructure	Brooklyn	Rajendra Ravel	COMMON QUEUE	05/06/2019	5

💡 **Quick Tip**

When users search for the CP Request, the results would display in the grid view layout

User would also be able to filter their results using the input search bar

CP Tracker

Reports

Report view display the same list for all users CP requests within the user's division. It displays the no. of days each CP request was in each queue and the total number of days it was in the workflow.

- Clicking a CP Request number will open the CP Request form
- Users have the option to export the report to Microsoft Excel but clicking the "Export to Excel" button
- Users can quickly jump to any page by using the pagination option on the button right corner of the reports table

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🏠 Home › Reports

📊 Export to Excel

DAYS IN EACH QUEUE

Show [10 ▼] entries   Search: [_____]

CP# ▾	FSM ID ▾	FSM Description ▾	Project ID ▾	Division▾	Unit ▾	Agency ▾	CP Status ▾	Status Date ▾	PM ▾	Total Days in PM Queue▾	No. Of Times in PM Queue ▾	PM Start Date ▾	PM End Date ▾	Budget Director ▾	Total Days in Budget Director Queue ▾	No. of Times in Budget Director▾	BD Start Date ▾
CP-000076	LBM15R	Building Envelope	LBM253	Public B.	Lib.	Brooklyn	OMB	11/02/17	Bill J.	63	5	06/01/17	11/22/17	John T.	0	2	05/25/17
CP-000049	LBM32W	Tremont Branch	DO986	Infra.	Lib.	Queens	Rejected	11/05/17	John Q.	25	4	06/12/17	06/30/17	Steve L.	2	2	06/20/17
CP-000569	LBM15R	Building Envelope	LBM253	Public B.	Lib.	Brooklyn	OMB	11/02/17	Bill J.	63	5	06/01/17	11/22/17	John T.	0	2	05/25/17
CP-005897	LBM32W	Tremont Branch	DO986	Infra.	Lib.	Queens	Rejected	11/05/17	John Q.	25	4	06/12/17	06/30/17	Steve L.	2	2	06/20/17
CP-058676	LBM15R	Building Envelope	LBM253	Public B.	Lib.	Brooklyn	OMB	11/02/17	Bill J.	63	5	06/01/17	11/22/17	John T.	0	2	05/25/17
CP-002500	LBM32W	Tremont Branch	DO986	Infra.	Lib.	Queens	Rejected	11/05/17	John Q.	25	4	06/12/17	06/30/17	Steve L.	2	2	06/20/17
CP-100076	LBM15R	Building Envelope	LBM253	Public B.	Lib.	Brooklyn	OMB	11/02/17	Bill J.	63	5	06/01/17	11/22/17	John T.	0	2	05/25/17
CP-210049	LBM32W	Tremont Branch	DO986	Infra.	Lib.	Queens	Rejected	11/05/17	John Q.	25	4	06/12/17	06/30/17	Steve L.	2	2	06/20/17
CP-152076	LBM15R	Building Envelope	LBM253	Public B.	Lib.	Brooklyn	OMB	11/02/17	Bill J.	63	5	06/01/17	11/22/17	John T.	0	2	05/25/17
CP-568049	LBM32W	Tremont Branch	DO986	Infra.	Lib.	Queens	Rejected	11/05/17	John Q.	25	4	06/12/17	06/30/17	Steve L.	2	2	06/20/17

Previous 1 2 3 4 … 35 Next

💡 Quick Tip

- The report includes only completed CP's
- Each queue includes the total number of days and the total number of times the CP has been forwarded / rejected to the queue in parenthesis
- Total days is considered from the date the CP got initiated to "OMB Approved Or Rejected"

CP Tracker

Print Queue

All staff can view the list of CP Request that are in Print Queue state and ready for printing.

- Clicking the CP Number will open the CP Request form
- Clicking "Task" will display the workflow of the CP Request

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≡　📈　│　CP TRACKER　　　　　　　　　　　　　　　　　　　　　　　　　👤 Sterlin Archer ▼

🏠 Home > Print Queue

CP - PRINT QUEUE

Show [50 ▼]　　　　　　　　　　　　　　　　　　　　　　　　　Search: [＿＿＿＿＿＿]

Rec No ▼	CP Type ▼	FMS ID ▼	Client Agency ▼	Division ▼	Unit Name ▼	Requested By ▼	CP Status ▼	Start Date ▼	
CP-000076	NEW	LBM14MRCH	826	Infrastructure	Queens	Dekran Arakelian	In Sr. PM Queue-Rejected	06/06/2019	☷ Task
CP-000049	AMENDED	REMPIV	826	Infrastructure	Brooklyn	Rajendra Ravel	COMMON QUEUE	05/06/2019	☷ Task
CP-000076	NEW	BED-776	826	Public Buildings	Queens	Dekran Arakelian	In Sr. PM Queue-Rejected	06/06/2019	☷ Task
CP-000049	AMENDED	ACED0SSS1	856	Infrastructure	Brooklyn	Rajendra Ravel	COMMON QUEUE	05/06/2019	☷ Task
CP-000076	AMENDED	WM-LC-17	826	Public Buildings	Queens	Dekran Arakelian	In Sr. PM Queue-Rejected	06/06/2019	☷ Task
CP-000049	NEW	HWMP2019	842	Infrastructure	Brooklyn	Rajendra Ravel	COMMON QUEUE	05/06/2019	☷ Task

CP Tracker

Reassign Task

Other than PMs, Sr. PM, CBA and Administrator Staff, all other staff will have an option to re-assign task (CP Request) to another corresponding staff.

- Clicking the CP Number will open the CP Request form
- Clicking "Task" will display the workflow as in progress

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🏠 Home > Re-Assign Task

RE-ASSIGN PENDING TASK

View Pending Tasks Assigned To

Rec No. ▲	FSM ID ▲		Description ▲	PM ▲	CP Status ▲	Assigned To ▲	Reassign Task
CP-000076	LBM15R	☰ Task	Public Buildings	Jason S	In PM Queue - Reject by CBA	Bobby C - PM	REASSIGN TASK
CP-000049	LBM32W	☰ Task	Public Buildings	Bobby J	In PM Queue - Reject by CBA	Luke C - PM	REASSIGN TASK
CP-000569	LBM15R	☰ Task	Public Buildings	Adam S	In PM Queue - Reject by CBA	Sterlin A - PM	REASSIGN TASK
CP-005897	LBM32W	☰ Task	Public Buildings	Claire H	COMMON QUEUE	Lona R - PM	REASSIGN TASK
CP-058676	LBM15R	☰ Task	Public Buildings	Sabrina J	COMMON QUEUE	Lona A - PM	REASSIGN TASK
CP-002500	LBM32W	☰ Task	Public Buildings	Nate A	In PM Queue - Reject by CBA	Latoya A - PM	REASSIGN TASK
CP-100076	LBM15R	☰ Task	Public Buildings	Steve M	In PM Queue - Reject by CBA	John A - PM	REASSIGN TASK
CP-210049	LBM32W	☰ Task	Public Buildings	Mark R	COMMON QUEUE	Rich Q - PM	REASSIGN TASK
CP-152076	LBM15R	☰ Task	Infrastructure	Greg F	COMMON QUEUE	Mathew H - PM	REASSIGN TASK
CP-568049	LBM32W	☰ Task	Infrastructure	Julio S	COMMON QUEUE	Luis R - PM	REASSIGN TASK

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💡 **Quick Tip**

- When clicking "REASSIGN TASK" will display a user selection window as shown on the right
- Selecting a user from the drop-down and clicking on "Reassign" button will send the CP Request to the selected staff's queue

REASSIGN TO   ✕

Select ▼

[Reassign]   [Close]

CP Tracker

NYC DDC **Department of Design and Construction**

Creating A New CP Request - Public Buildings

Project Managers (Public Buildings) or Senior Project Manager (Infrastructure) will have an option to create a new CP Request. The project must be already existed in Benchmark having Milestone Dates and Project Managers or Senior Project Managers must be a member in Benchmark Team.

- Project Information
  - Budget Information
- CP Information
- Amended CP
- OMB Tracking
- Scope, Justification and Milestone Dates
- Attachments
- Submit CP Request (to Budget Director)

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🏠 Home	🏠 Home › CP Dashboard
📄 New CP Request	
🔍 Search	
☰ Report	
🖨 Print Queue	
⚙ Admin	
⚙ Workflow Designer	
👥 Roles	
❓ Help ‹	

CP Request

Export to Excel

PENDING TASKS   MY TASK

Show [50 ▼] entries   Search: [   ]

CP No ▼	CP Type ▼	Project ID ▼	Division ▼	Unit Name ▼	Requested By ▼	Sent By ▼	Assign To ▼	CP Status ▼	Start Date ▼
CP-000076	Amended	LBM14MRCH	Public Buildings	Libraries	Dorbin Garcia	Dekran Arakelian	Dorbin Garcia	COMMON QUEUE	01/17/2018

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CP Tracker

Creating A New CP Request - Infrastructure

Project Managers (Public Buildings) or Senior Project Manager (Infrastructure) will have an option to create a new CP Request. The project must be already existed in Benchmark having Milestone Dates and Project Managers or Senior Project Managers must be a member in Benchmark Team.

- Project Information
  - Budget Information
- CP Information
- Amended CP
- OMB Tracking
- Scope, Justification and Milestone Dates
- Attachments
- Submit CP Request (to Budget Director)

CP TRACKER

Sterlin Archer

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  - Roles
- Help

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CP Request

Export to Excel

PENDING TASKS

MY TASK

Show 50 entries

Search:

CP No ▼	CP Type ▼	Project ID ▼	Division ▼	Unit Name ▼	Requested By ▼	Sent By ▼	Assign To ▼	CP Status ▼	Start Date ▼
CP-000076	Amended	LBM14MRCH	Public Buildings	Libraries	Dorbin Garcia	Dekran Arakelian	Dorbin Garcia	COMMON QUEUE	01/17/2018

CP Tracker

Creating A New CP Request - Project Information - Infrastructure

Clicking on 'New CP Request' option from the homepage menu will display the below page, which is the new CP Request form.

- Entering at least 2 characters will display a list of all matching, existing FMS IDs from FMS system. You select a FMS IT to proceed
- This section gets updated once the CP Request is saved as draft
- These fields will get auto-populated based on the FMS ID selected and they will be read-only

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🏠 Home > CP Request Form

CP REQUEST FORM

REC NO:	CP-000405					
CREATED:	06/06/2019	BY:	Ryan Stanly	UPDATED:	06/06/2019	BY:	Ryan Stanely

PROJECT INFORMATION

FMS ID *
GQTI03-23

FMS Available Balance
$10,000,391.00

[View Budget Information]

DDC Project ID *
GQTI03-23

FMS Description
GI - GREEN INFRASTRUCTURE IN TI-003 & TI-023 EAST RIVE CSO

Project Description
GREEN INFRASTRUCTURE IN TI-003 & 023 EAST RIVER

Project Type
DDC Project Type

Client Agency *
DEPT OF ENVIRONMENTAL PROTECTION

Division
Infrastructure

Unit
Bronx & N. Queens

WORKFLOW NOT STARTED   [SAVE DRAFT]   [SEND TO BUDGET]

💡 **Quick Tip**

- Clicking on "View Budget Information" will display the budget information corresponding to the FMS ID. See the next page for details.
- Workflow Not Started: This section shows the current status / stage of a CP Request during the entire workflow
- Clicking the save draft button after filling all the mandatory fields will save the new CP Request as draft.

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CP Tracker

Creating A New CP Request - Project Information - Public Buildings

Clicking on 'New CP Request' option from the homepage menu will display the below page, which is the new CP Request form.

- Entering at least 2 characters will display a list of all matching, existing FMS IDs from FMS system. You select a FMS IT to proceed
- This section gets updated once the CP Request is saved as draft
- These fields will get auto-populated based on the FMS ID selected and they will be read-only

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☰ 📈 | CP TRACKER   👤 Sterlin Archer ▼

🏠 Home > CP Request Form

CP REQUEST FORM

REC NO:	CP-000405					
CREATED:	06/06/2019	BY:	Ryan Stanly	UPDATED:	06/06/2019	BY:	Ryan Stanely

PROJECT INFORMATION

FMS ID *
GQTI03-23

FMS Available Balance
$10,000,391.00

[View Budget Information]

DDC Project ID *
GQTI03-23

FMS Description
GI - GREEN INFRASTRUCTURE IN TI-003 & TI-023 EAST RIVE CSO

Project Description
Description

Client Agency *
DEPT OF ENVIRONMENTAL PROTECTION

Division
Infrastructure

Unit
Bronx & N. Queens

WORKFLOW NOT STARTED   [SAVE DRAFT]   [SEND TO BUDGET]

💡 **Quick Tip**

- Clicking on "View Budget Information" will display the budget information corresponding to the FMS ID. See the next page for details.
- Workflow Not Started: This section shows the current status / stage of a CP Request during the entire workflow
- Clicking the save draft button after filling all the mandatory fields will save the new CP Request as draft.

CP Tracker

New CP Request - Budget Information

🏠 Home > CP Request Form

✕

FMS3 Capital Commitment Budget: GQTI03-23

AGN	CAP Proj ID	Description	Type	Phase	Plan	Commitments	Actual Exp	Available
850	GQTI03-23		CAP	CONS	$10,000,000.00	$0.00	$0.00	$10,000,000.00
			CAP	DSGN	$8,714,000.00	$8,713,610.00	$301,116.00	$390.00
850	GQTI03-23		IFA	IFDS	$150,000.00	$149,999.00	$111,336.00	$1.00
		Total			$18,864,000.00	$8,836,609.00	$412,502.00	**$10,000,391.00**

Close

Infrastructure

Bronx & N. Queens

⚙ **WORKFLOW NOT STARTED**

SAVE DRAFT   SEND TO BUDGET

💡 **Quick Tip**

- These values are fetched from FMS application for selected FMS ID

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CP Tracker

New CP Request - CP Information - Infrastructure

- Original Date CP Request to Budget field will auto-populate to the current date once saved
- Amount Requested by PM field is mandatory. This can be greater than FMS available balance
- Amount Request sent to OMB field gets populated if the M requested amount gets change during the workflow

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🏠 Home > CP Request Form

CP INFORMATION

[+ ADD Secondary FMSID]   [+ ADD FUNDING TYPE]

Sec FMS information not found...

FMSID	FUNDING TYPE	PROCUREMENT	AMOUNT ($)
GQTI03-23	CNSP	CM	6500.00

Amount Requested by Sr. PM *
$ 6500.00

Amount Requested by Sr. PM
$

Original Date CP Request to Budget
__ / __ / __

In-House Design
◯ Yes ⦿ No

Does the scope involve amenity *
◯ Yes ⦿ No

Is there a third party / private use agreement *
◯ Yes ⦿ No

TEA Estimate applicable *
◯ Yes ⦿ No

Maintenance Impacts *
◯ Yes ⦿ No

Blanket CP ◯ Yes ⦿ No

Grant Applicable * ◯ Yes ⦿ No

Comments

💡 **Quick Tip**
- Users must select a supervisor for email notifications
- Scope and Justification information are mandatory fields

Is Amended CP?
◯ Yes ⦿ No

Infra Supervisor * (Once CP is approved, an email notification will be sent to this supervisor)

Ryan Seacreast

☑ You need to have your supervisor approval prior to submitting the CP to Admin, you acknowledge that the supervisor has approved your CP to be submitted to Admin. *

Scope Information * (min 500 char)

Justification Information * (min 500 char)

CP Tracker

New CP Request - CP Information - Public Buildings

Only the people with budget roles (Budget Director, Deputy Director, CBA, Executive Director & CFO) can see Budget Lines and View Budget Line Information for both Public Buildings & Infrastructure. Only Infrastructure has FMSID information.

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🏠 Home ＞ CP Request Form

CP INFORMATION

+ ADD PROJECT SCOPE

PROJECT SCOPE	APPROACH
Roofing	Replacement

+ ADD FUNDING TYPE

FMSID	FUNDING TYPE	PROCUREMENT	AMOUNT ($)
GQTI03-23	CNSP	CM	6500.00

Amount Requested by Sr. PM *
$ 6500.00

Amount Requested by Sr. PM
$

Original Date CP Request to Budget
__ / __ / __

In-House Design
◯ Yes ◉ No

Does the scope involve amenity *
◯ Yes ◉ No

Is there a third party / private use agreement *
◯ Yes ◉ No

TEA Estimate applicable *
◯ Yes ◉ No

Maintenance Impacts *
◯ Yes ◉ No

Blanket CP ◯ Yes ◉ No

Grant Applicable * ◯ Yes ◉ No

Comments

Quick Tip
- Users must select a supervisor for email notifications
- Scope and Justification information are mandatory fields

Is Amended CP?
◯ Yes ◉ No

Infra Supervisor * (Once CP is approved, an email notification will be sent to this supervisor)
Ryan Seacreast

☑ You need to have your supervisor approval prior to submitting the CP to Admin, you acknowledge that the supervisor has approved your CP to be submitted to Admin. *

Scope Information * (min 500 char)

Justification Information * (min 500 char)

CP Tracker

New CP Request - CP Information Continued

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⌂ Home › CP Request Form

CP INFORMATION

Milestone Dates

Milestone	Original	Projected	Actual
Design Start	08/18/2017	08/18/2017	08/18/2017
Design Completion	06/08/2017	06/08/2017	__/__/__
Construction Start	__/__/__	__/__/__	__/__/__
Construction Complete	__/__/__	__/__/__	__/__/__

Refresh Milestones

+ ADD ATTACHMENTS

Following are the required documents to be uploaded from this CP Request, to attach any additional documents please use "add attachment"button

DOCUMENT TYPE	DESCRIPTION	DOCUMENT NAME	DATE	UPLOAD	DELETE	☐ SELECT ALL
* Final Scope Document	*Final Scope Document*	testing.docx	06/06/2019	REPLACE		☐

💡 **Quick Tip**

• The milestone dates table will auto populate from Benchmark application, based on the FMS ID selected

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CP Tracker

New CP Request - Amended CP

When users select "Is Amended CP" as yes, the user will see new entry fields that will display in the CP Information section on the CP Request Form

- Clicking a CP Request number will open the previous CP Request form
- Incremental Increase Amount is a mandatory field
- Contingency Amount will be enabled only if the answer for "Are you using contingency amount?" is "Yes"

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🏠 Home > CP Request Form

Is Amended CP?
◉ Yes ○ No

Previous CP Information

[+ ADD Previous CP]

LIST OF PREVIOUS CPs

CP#	CP AMOUNT	APPROVED DATE	TYPE	STATUS
CP-000187	996,684.00	11/19/2018	System	PMB Approved - CP Completed
CP-000346	57,447.88	04/25/2019	System	PMB Approved - CP Completed
64869	7,175,348.00	07/31/2017	System	PMB Approved - CP Completed

Purpose of Amendment *
[   ]

Explanation *
[   ]

Force Account Estimate Applicable? *
○ Yes ◉ No

Incremental Increase Amount *
[$]

Are you using contingency amount? *
○ Yes ◉ No

Force Account Estimate *
[$]

Contingency Amount *
[$]

Infra Supervisor * (Once CP is approved, an email notification will be sent to the supervisor)
[   ]

☐ You will need to have your supervisor approval prior to submitting the CP to Admin, you acknowledge that he selected supervisor has approval your CP to be submitted to Admin.*

💡 **Quick Tip**

- All the fields in this section are mandatory for Amended CP

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CP Tracker

Department of Design and Construction

New CP Request - Attachments

By default, mandatory documents are listed. You can click this button to add any optional documents.

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🏠 Home ❯ CP Request Form

CP Information

[+ ADD ATTACHMENTS]

Following are the required documents to be uploaded from this CP Request, to attach any additional documents please use "add attachment"button

DOCUMENT TYPE	DESCRIPTION	DOCUMENT NAME	DATE	UPLOAD	DELETE	☐ SELECT ALL
* Final Scope Document	*Final Scope Document*	testing.docx	06/06/2019	REPLACE		☐
* Budget Code Questionnaire (BCQ)	*Budget Code Questionnaire (BCQ)*			UPLOAD		☐
* Lease/License/Use Agreement	*Lease/License/Use Agreement*			UPLOAD		☐
* Previous CP(s)	*Previous CP (s)*			UPLOAD		☐

💡 **Quick Tip**

- Clicking upload, will prompt another window that will allow users to select and upload documents.

File Upload

Document Type

[Select Type]

Select file to upload (.doc, .docx, .xlsx, .pdf)

[Choose File]

[Upload]   [Close]

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CP Tracker

New CP Request - Submission to Budget Director

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⌂ Home ▸ CP Request Form

CP REQUEST FORM   /2019   BY: Ryan Stanely

PROJECT INFORMATION

FMS ID *
GQTI03-23

DDC Project ID *
GQTI03-23

Project Description
GREEN INFRASTRUCTURE IN TI-003

Project Type
DDC Project Type

Division
Infrastructure

View Budget Information

Bronx & N. Queens

✓

CP has been successfully sent to Budget Director Common Queue

OK

WORKFLOW NOT STARTED   SAVE DRAFT   SEND TO BUDGET

💡 **Quick Tip**

• Once submitted, the CP Request will enter the workflow
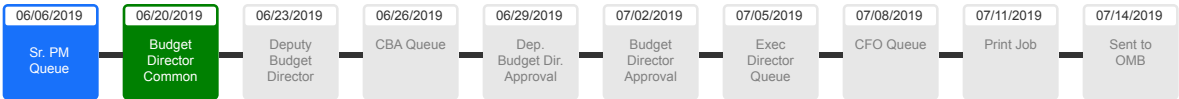
Department of Design and Construction

Budget Director Decision

Once a new CP request is submitted by a PM / PA, the same will appear in 'Common Queue' which is the Budget Directors (BD) queue. Any BD can pick the CP request to review and approve/reject based on their review.

- The Budget Director can either Approve or Reject the CP Request. If rejecting the CP Request, then the comments is mandatory
- User selection is mandatory and the drop-down will display all available Deputy Budget Directors within the division

WORKFLOW ACTIONS

🟦 Completed   🟩 Current   ⬜ Not Started

06/06/2019	06/20/2019	06/23/2019	06/26/2019	06/29/2019	07/02/2019	07/05/2019	07/08/2019	07/11/2019	07/14/2019
Sr. PM Queue	Budget Director Common	Deputy Budget Director	CBA Queue	Dep. Budget Dir. Approval	Budget Director Approval	Exec Director Queue	CFO Queue	Print Job	Sent to OMB

Select a workflow action and click Submit

Select a workflow

User selection

Comments

Doc Type	Doc Name	Comments
Budget Code Questionnaire	Energy Profile Report	

SUBMIT   CANCEL

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CP Tracker

Department of Design and Construction

Budget Director Decision - Continued

Once the Budget Director Approves / Rejects the CP request, the following message will appear. **The same pattern continues till the CP request is submitted to Print Job.**

- The last updated person name and date will automatically get displayed here as the CP Request travels in the workflow

WORKFLOW ACTIONS

■ Completed   ■ Current   ■ Not Started

06/06/2019	06/20/2019	06/23/2019	06/26/2019	06/29/2019	07/02/2019	07/05/2019	07/08/2019	07/11/2019	07/14/2019
Sr. PM Queue	Budget Director Common	Deputy Budget	CBA Queue	Dep. Budget Dir.	Budget Director	Exec Director	CFO Queue	Print Job	Sent to OMB

Select a workflow action and click Subm...

Select a workflow

User selection

Comments

✓

Workflow request processed successfully

OK

Doc Type	Doc Name	Comments
Budget Code Questionnaire	Energy Profile Report	

SUBMIT   CANCEL

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CP Tracker

Returning a CP Request

After CBA approval, all other roles will have an additional (decision) option to return the CP request back to any of the previously approved staff based on the role. Below are the options based on their role.

- A CBA can return to PM
- A Deputy Budget Director can return to PM and CBA
- An Executive Director can return to PM, CBA, DBD or BD

WORKFLOW ACTIONS

■ Completed   ■ Current   ■ Not Started

06/06/2019	06/20/2019	06/23/2019	06/26/2019	06/29/2019	07/02/2019	07/05/2019	07/08/2019	07/11/2019	07/14/2019
Sr. PM Queue	Budget Director Common	Deputy Budget Director	CBA Queue	Dep. Budget Dir. Approval	Budget Director Approval	Exec Director Queue	CFO Queue	Print Job	Sent to OMB

Select a workflow action and click Submit

[APPROVE] 7..0 - Exec Director Queue
[APPROVE] 7..0 - Exec Director Queue
[REJECT] 5.0 - Dep. Budget Dir Approval
[GOTO] 1.0 - PM Queue

Comments

Doc Type	Doc Name	Comments
Budget Code Questionnaire	Energy Profile Report	

SUBMIT   CANCEL

💡 **Quick Tip**

Selecting [GOTO] option and selecting a user will return the CP Request

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CP Tracker

Print Job Queue

Once the CP request is in Print Job queue, the print staff can print the document in order to send to OMB.

- Selecting a date is mandatory. Clicking this will open a calendar widget
- A Deputy Budget Director can return to PM and CBA
- An Executive Director can return to PM, CBA, DBD or BD

DOCUMENTS TO PRINT

Note: Print the documents by opening the documents

Sent to OMB Date: 04/18/2018

	Document Name	Document Type	🖨 Printed Successfully
1	CP-000162	CP Form	☑
2	CP-000162	CP Form	☑
3	CP-000162	CP Form	☑
4	CP-000162	CP Form	☑

CONTINUE   CANCEL

CP REQUEST FORM

| REC NO: | CP-000405 | | | | | |
| CREATED: | 06/06/2019 | BY: | Ryan Stanly | UPDATED: | 06/06/2019 | BY: | Ryan Stanely |

PROJECT INFORMATION

FMS ID *
GQTI03-23

DDC Project ID *
GQTI03-23

Project Description
GREEN INFRASTRUCTURE IN TI-003

Project Type
DDC Project Type

Division
Infrastructure

View Budget Information

WORKFLOW NOT STARTED

SAVE DRAFT   SEND TO BUDGET

Quick Tip

- The staff from Print Job unit can check this box to make all the below checkboxes as checked (or) they can click on individual boxes. It is part of the process to check these after printing the documents

CP Tracker

NYC DDC **Department of Design and Construction**

Print Job Queue - Printing Documents

🏠 Home > CP Request Form

CP REQUEST FORM

REC NO:	CP-000405				
CREATED:	06/06/2019	BY:	Ryan Stanly	UPDATED:	06/06/2019	BY:	Ryan Stanely

PROJECT INFORMATION

DOCUMENTS TO PRINT

Note: Print

View Budget Information

FMS ID *
GQTI03-23

Sent to OMB

DDC Project ID *
GQTI03-23

Document N			nted ccessfully
1	CP-00016		☑
2	CP-00016		☑
3	CP-00016		☑
4	CP-00016		☑

Project Description
GREEN INFRASTRUCTURE IN TI-003

Project Type
DDC Project Type

Division
Infrastructure

⚠️

Print documents

Please confirm that you have printed all the
documents by checking "Printed Successfully" check box

OK

CONTINUE   CANCEL

WORKFLOW NOT STARTED

SAVE DRAFT   SEND TO BUDGET

💡 **Quick Tip**

- Clicking on "CONTINUE" button without checking the checkboxes will display
  a warning message as shown above.

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CP Tracker

Print Job Queue

Home > CP Request Form

CP REQUEST FORM

REC NO:	CP-000405				
CREATED:	06/06/2019	BY:	Ryan Stanly	UPDATED:	06/06/2019	BY:	Ryan Stanely

PROJECT INFORMATION

DOCUMENTS TO PRINT

Note: Print

Sent to OMB

FMS ID *
GQTI03-23

DDC Project ID *
GQTI03-23

Project Description
GREEN INFRASTRUCTURE IN TI-003

Project Type
DDC Project Type

Division
Infrastructure

View Budget Information

Document N			nted ccessfully
1	CP-00016		☑
2	CP-00016		☑
3	CP-00016		☑
4	CP-00016		☑

⚠

Print Confirmation?

Please confirm if you have
printed all the required documents

[Confirm]   [Cancel]

[CONTINUE]   [CANCEL]

WORKFLOW NOT STARTED

[SAVE DRAFT]   [SEND TO BUDGET]

💡 **Quick Tip**

- Clicking on "Confirm" button will complete the workflow of the CP Request and the status will become "Sent to OMB"

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CP Tracker

OMB Response Update

Once the response from OMB is received towards a CP request, CBA will be able to update the response in the CP request form, which will have a new section as shown below.

- A response from OMB for a CP Request could be either Approved/ Rejected/ Returned for Q&A
- CP Rejection Date will be enabled only if the response from OMB was "Rejected". Similarly the CP Amount Date field will be enabled only if the response is "Approved"
- CP Total approved Amount could be different (more/less) than the requested amount

---

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🏠 Home ❯ Search

| * Budget Code Questionnaire | *Budget Code Questionnaire* | Energy Profile | 04/17/2018 |
| * Lease/License Use Agreement | *Lease/License Use Agreement* | NYPD-ACE-14 | 04/17/2018 |

OMB TRACKING INFORMATION

Sent to OMB Date
04/20/2018

CP Approved / Rejected
Approved

CP Approval Date
__ / __ / __

CP Rejection Date
__ / __ / __

FN #

OMB CP Approval #

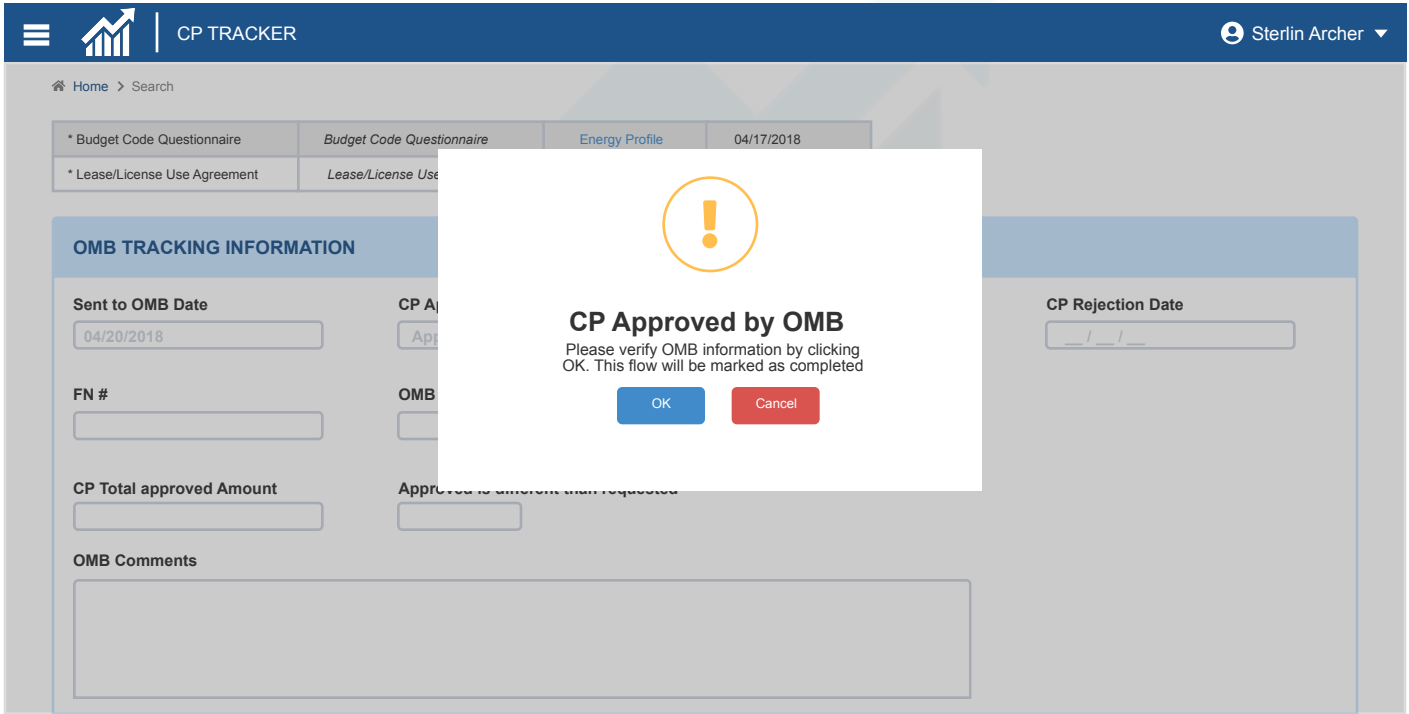**Days at OMB**

CP Total approved Amount

Approved is different than requested

OMB Comments

CP Tracker

Workflow Completion

After OMB response have been updated and clicking on SAVE button will display a confirmation as shown below. Clicking the OK button will complete the workflow for the CP request.

- Clicking on "OK" button will complete the workflow

Quick Tip

- In case of "Rejected" or "Return for Q&A" will send the CP Request back to the initiated PM and the entire workflow will have be repeated again

CP Tracker