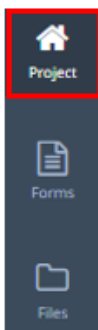# Project Details

The Project Details area lists basic project details and is partially completed by CPO when the project is created in ProjectTeam. When you are assigned to a new project, one of the first things that you should do is go into the Project Details and finish filling it out. This area contains important data about the project, the building, and the project team. This information is used for reporting and it is important to keep it current.
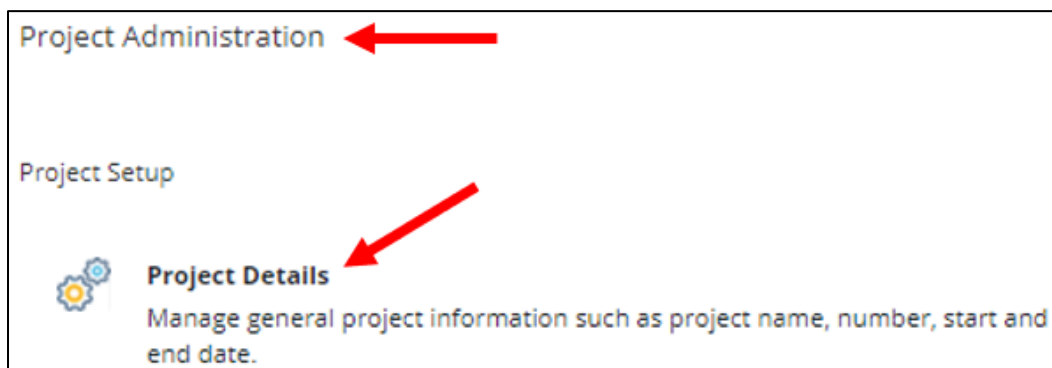
Editing the Project Information Form

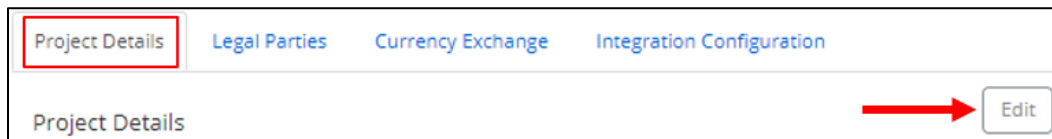1. Click the **Project** icon on the left navigation pane.

2. Scroll the webpage down to the **Project Administration** section and click on the **Project Details** link.

   > **NOTE:** If the Project Administration section and the Project Details are not available on the Project Home page, contact the Project EPM to grant you "Project Administrator" access.

Project Details Tab

3. In the **Project Details Tab,** click on the **Edit** button to start updating the Project Details.

Project Details	Legal Parties	Currency Exchange	Integration Configuration

Project Details   Edit

4. The **Project Name** is created by CPO and should not be changed.

> **NOTE:** The Project Name is the <u>overall</u> name of the Project. For instance, if the Project is to modernize Collidge High School, but the current budget only allows for planning and design, the Project is still named "Coolidge High School Modernization" and will be used for the entire duration of the project.

Project Name

Coolidge High School Modernization

5. The **Project Number** is generated by CPO and should not be changed.
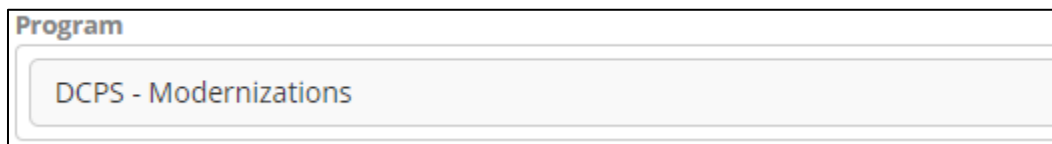
Project Number

DCPS-000032-MODRN

6. The **Created From Project Template** field identifies the source Template for this Project and is not editable.

Created From Project Template
Project Template

7. The **Program** is set by CPO and it should not be changed.

Program

DCPS - Modernizations

8. The **Project Address** is set by CPO and it should not be changed.

> **NOTE:** For Projects with multiple locations, the Project Address will be listed as Various.

Project Address

6315 5th Street, NW
Washington, DC 20011

9. The **Project Email Address** is unique for each Project and is not editable. People with access to the Project can send or forward important emails directly to the Project with this email address.

Project Email Address ⑦
644e58fc1a764f1aab81b55a0d2f04aa@projects.projectteam.net

10. The **Project Description** is initially entered by CPO at project creation using the description provided in the submitted Project Request from the EPM. Validate the initial description and update it if needed. Throughout the life of the project, update it if the scope changes.

Project Description

11. The **Project Start Date** is the beginning of the Project, when the project was initiated and assigned to a PM by their EPM or when the Planning Phase begins.

Project Start Date

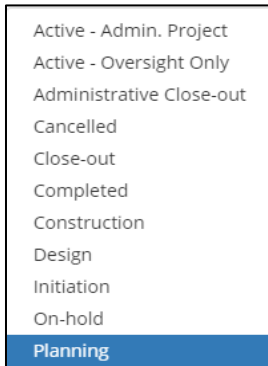12. The **Project End Date** is the date when the Project is completely finished, including close-out.

   NOTE: This is not the Substantial Completion Date.

Project End Date

13. The **Project Status** is the current state of the project. It should be updated promptly as the project progresses throughout the life of the project.

Project Status

Most projects will start in the Planning Status and then progress through some of the following states.

```
Active - Admin. Project
Active - Oversight Only
Administrative Close-out
Cancelled
Close-out
Completed
Construction
Design
Initiation
On-hold
Planning
```
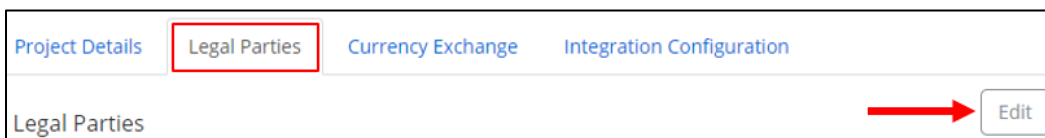
14. Click **Save** at the top of the form prior to continuing to the Legal Parties Tab.
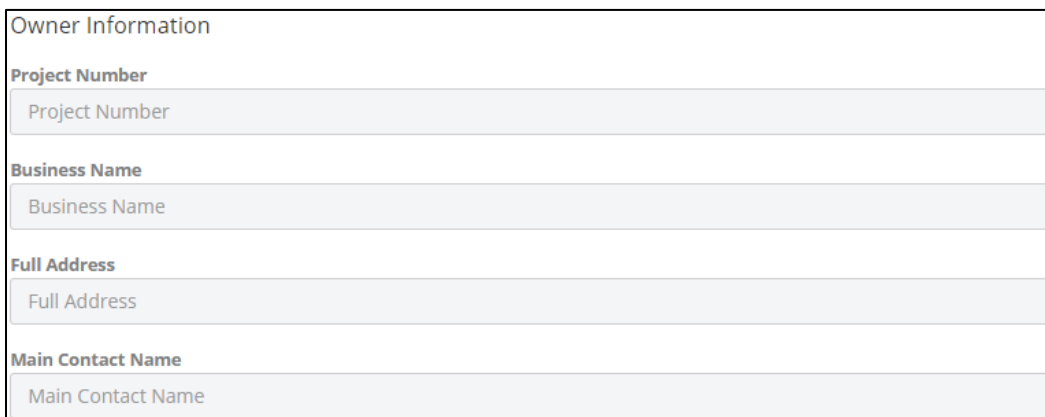
Cancel   Save

Legal Parties Tab

1. On the **Legal Parties Tab**, click on the **Edit** button to update the Project Details form.

Project Details	Legal Parties	Currency Exchange	Integration Configuration

Legal Parties   Edit

2. The **Owner Information** can be skipped.

Owner Information

Project Number

Project Number

Business Name

Business Name

Full Address

Full Address

Main Contact Name

Main Contact Name

3. The **Architect Information** Business Name field is to be updated by the PM with the A/E information.

NOTE: For projects that do not have an A/E enter "N/A" in the Business Name field. Enter "To Be Determined" if the A/E has not been determined.

Architect Information

Project Number
> Project Number

Business Name
> Business Name

Full Address
> Full Address

Main Contact Name
> Main Contact Name

4. The **Contractor Information** Business Name field is to be updated by the PM with the General Contractor's information or "To Be Determined" if the GC has not been determined.

Contractor Information

Project Number
> Project Number

Business Name
> Business Name

Full Address
> Full Address

Main Contact Name
> Main Contact Name

5. The **Other Information** Business Name field is to be updated by the PM with the Construction Manager's information for projects that have a 3rd Party Owner's Representative.

NOTE: For Projects that do not have a CM enter "N/A" in the Business Name field or "To Be Determined" if the CM has not been determined.

Other Information

Project Number

Project Number

Business Name

Business Name

Full Address

Full Address

Main Contact Name

Main Contact Name

6. Click Save at the top of the form.

Currency Exchange Tab

1. The Currency Exchange is set to US Dollar currency by default. This Tab can be skipped.

Integration Configuration Tab

1. The Integration Configuration is entered by CPO and should not be changed. This Tab can be skipped.