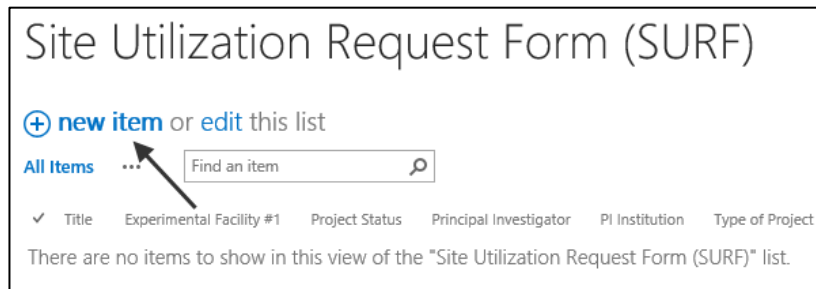


Site Utilization Request Form (SURF)

Before a project can be created, a Site Utilization Request Form must be completed and approved. The steps below outline the process for filling out a SURF. If you have issues connecting to the SURF, please contact the Facility Site Office Coordinator (FSOC), Daniel Zehner at zehner2@purdue.edu.

1. Open Internet Explorer and navigate the following URL:
<https://nheripurdue.sharepoint.com/sites/pwa/SURF/>
2. Review the instructions for filling out the form on the homepage.
3. Select the SURF link from the left navigation.
4. Select the new item link:



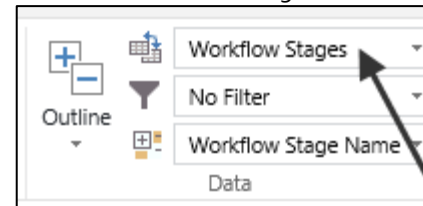
5. Complete all the information required on the form. Required fields are notated with a blue *. When finished, click Save.

The request will be sent to the FSOC for review. When approved a project will be created in the Project Online system, also known as PWA.

Accessing Project Online and Navigating the Scheduling Protocol Workflow

New projects will be created by the FSOC and each Facility Site Manager will be contacted by the FSOC with more information. The steps below outline the Scheduling Protocol Workflow process defined in the system.

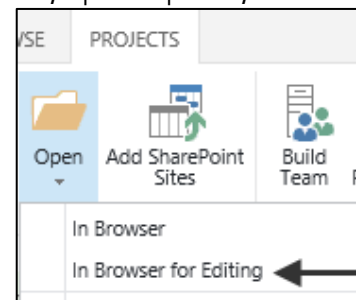
1. Open Internet Explorer and navigate the following URL:
<https://nheripurdue.sharepoint.com/sites/pwa/>
2. Login with the credentials provided to you by the FSOC.
3. From the Quick Launch side pane, select **Projects** section to see a list of projects on the server that you have access to.
4. Select the Workflow Stages view from the list of dropdown views:



5. The project at this time will be in Stage 4 – Test Plan of the workflow as shown in the following illustration:

Workflow Stage Name: Stage 4 - Test Plan	
NSF 1055744 - Hurricane Wind in the Coastal Suburban Roughness Sublayer	
NCE 1428854 - Wind Tunnel MPI	

6. To open the project, highlight the row for the project and from the Projects tab, Open dropdown, select the option for In Browser for Editing:



- 7.

If you have additional questions please contact the FSOC (zehner2@purdue.edu).

8. The Workflow Status page shows the Project Detail Pages (PDP) that are Incomplete. To complete the required fields, select the Test Planning PDP from the view shown below or from the left navigation.

Page Name	Status	Description
Site Utilization Request Form (SURF)	Complete	
ESPCC	Complete	
Test Planning	Incomplete	

Pages marked with "*" require attention

9. Required fields are indicated with a red *. In this stage, the Experimental Test Plan Complete field needs to be filled out with the appropriate dates as shown in the illustration below.

Experimental Test Plan Complete *

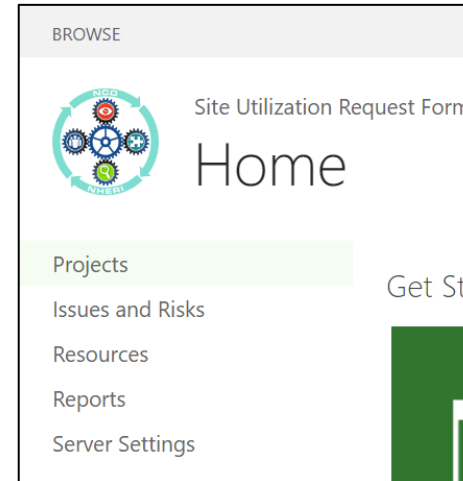
Note: Before marking this field complete the ETP must be completed and uploaded to the project SharePoint site. See the "Accessing the Project SharePoint Site" section later in this document for instructions on how to upload the document to the site.

10. When complete and the fields have been entered, from the Project tab, select the Save button and then the Submit button to progress the workflow to Stage 5. At this time, an email will be sent to the FSOC.
11. The next step is for the FSOC to build out the project schedule accordingly and set a project baseline. When complete, the FSOC will contact the appropriate individuals to execute the schedule.

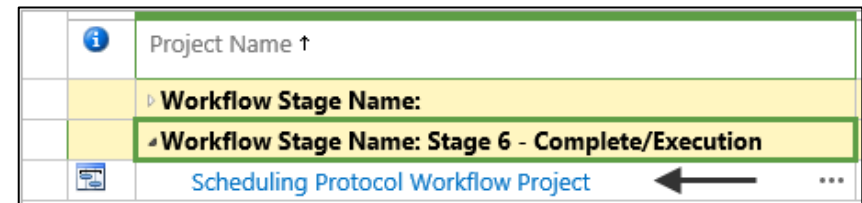
Executing the Project Schedule

Once the project has been release for execution, there are some important steps that should be followed in order to update the schedule properly. The below steps will guide you through the process for updating your project.

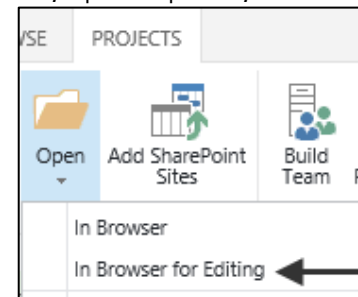
1. From PWA, select **Projects** from the left navigation to see a list of projects on the server that you have access to.



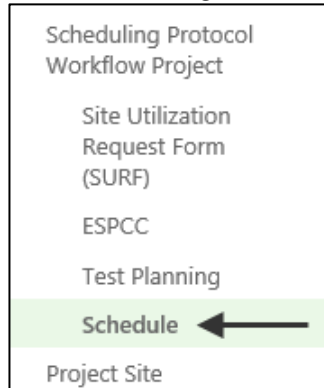
2. Select the Workflow Stages view from the list of dropdown views. Projects that are ready for execution will be listed in the Stage 6 – Complete/Execution section.



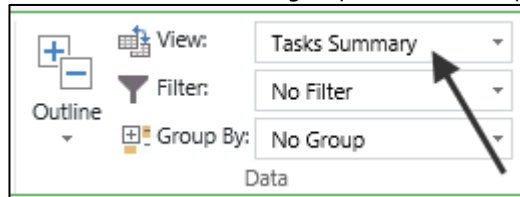
3. To open the project, highlight the row for the project and from the Projects tab, Open dropdown, select the option for In Browser for Editing:



4. From the left navigation, select the Schedule PDP.



5. From the Tasks tab, Data group, select the dropdown Task Summary view.



6. This view will display all the columns needed to update the schedule.

ID ↑	Mode	Task Name	Predec	% Complete	Duration	Start	Actual Start	Finish	Actual Finish	Resource Name
0		▸ Scheduling Protocol Workflow		0%	110d	2/3/2017		7/10/2017		
1		▸ Phase 3 - Specimen Constr		0%	45d	2/3/2017		4/6/2017		
2		Construction		0%	40d	2/3/2017		3/30/2017		
3		Preparation	2	0%	5d	3/31/2017		4/6/2017		
4		▸ Phase 4 - Testing		0%	35d	5/5/2017		6/23/2017		
5		Prepare Test Specimen		0%	5d	5/5/2017		5/11/2017		Equipment 1, Eq
6		Test Cycle 1	5	0%	10d	5/12/2017		5/25/2017		Equipment 1, Eq
7		Test Cycle 2	6	0%	10d	5/26/2017		6/9/2017		Equipment 1, Eq
8		Test Cycle 3	7	0%	10d	6/12/2017		6/23/2017		Equipment 1, Eq
9		▸ Phase 5 - Upload Raw Data		0%	0d	6/23/2017		6/23/2017		
10		Upload raw data		0%	0d	6/23/2017		6/23/2017		
11		▸ Phase 6 - Demolition		0%	10d	6/26/2017		7/10/2017		
12		Demolition		0%	10d	6/26/2017		7/10/2017		
13		Project Complete	12	0%	0d	7/10/2017		7/10/2017		

7. The steps for updating the project schedule are:

- a. Validate the project Start Date is the first day of the first task for Phase 3. In this example, the first task is Task ID 2 - Construction.

ID ↑	Mode	Task Name	Predec	% Complete	Duration	Start	Actual Start
0		▸ Scheduling Protocol Workflow		0%	110d	2/3/2017	
1		▸ Phase 3 - Specimen Constr		0%	45d	2/3/2017	
2		Construction		0%	40d	2/3/2017	
3		Preparation	2	0%	5d	3/31/2017	

- b. If this date is not correct, enter the correct date in the Actual Start Date column as shown here:

ID ↑	Mode	Task Name	Predec	% Complete	Duration	Start	Actual Start	Finish
0		▸ Scheduling Protocol Workflow		0%	110d	2/6/2017	2/6/2017	7/11/2017
1		▸ Phase 3 - Specimen Constr		0%	45d	2/6/2017	2/6/2017	4/7/2017
2		Construction		0%	40d	2/6/2017	2/6/2017	3/1/2017
3		Preparation	2	0%	5d	4/3/2017		4/7/2017

- c. You will see that based on this change, the other start and finish dates in the schedule will also change. Validate the planned Finish Date for this task and determine if this is accurate or not. If the planned Finish Date is not accurate, update the Duration field to adjust the Finish Date as shown here. Notice the other tasks in the schedule will be updated based on the changes made.

ID ↑	Mode	Task Name	Predec	% Complete	Duration	Start	Actual Start	Finish
0		▸ Scheduling Protocol Workflow		0%	105d	2/6/2017	2/6/2017	7/3/2017
1		▸ Phase 3 - Specimen Constr		0%	40d	2/6/2017	2/6/2017	3/31/2017
2		Construction		0%	35d	2/6/2017	2/6/2017	3/24/2017
3		Preparation	2	0%	5d	3/27/2017		3/31/2017

- d. Now begin updating the % Complete for the tasks in the plan. Update Task ID 2 – Construction to be 100% complete by entering the value in the % Complete column in the grid. Notice the Actual Finish Date is now populated based on the planned Finish Date that was previously set in the step above.

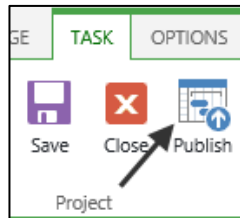
ID ↑	Mode	Task Name	Predec	% Complete	Duration	Start	Actual Start	Finish	Actual Finish
0		▸ Scheduling Protocol Workflow		41%	105d	2/6/2017	2/6/2017	7/3/2017	
1		▸ Phase 3 - Specimen Constr		88%	40d	2/6/2017	2/6/2017	3/31/2017	
2		Construction		100%	35d	2/6/2017	2/6/2017	3/24/2017	3/24/2017
3		Preparation	2	0%	5d	3/27/2017		3/31/2017	

- e. The next task in the schedule, Task ID 3 – Preparation, will now be the active task that the team should be working towards completing.
8. Update any other tasks that need updating by entering the % Complete for the task. This will automatically populate the Actual Start Date based on the planned Start Date value. If this date is incorrect, simply update the Actual Start Date in the grid. **Note:** % Complete values should show 0%, 25%, 50%, 75% or 100%.

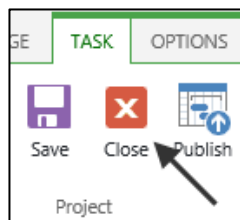
ID ↑	Mode	Task Name	Predec	% Complete	Duration	Start	Actual Start	Finish	Actual Finisl
0		↳ Scheduling Protocol Workflo		43%	105d	2/6/2017	2/6/2017	7/3/2017	
1		↳ Phase 3 - Specimen Constr		91%	40d	2/6/2017	2/6/2017	3/31/2017	
2		Construction		100%	35d	2/6/2017	2/6/2017	3/24/2017	3/24/2017
3		Preparation	2	25%	5d	3/27/2017	3/27/2017	3/31/2017	
4		↳ Phase 4 - Testing	3FS+1n	0%	35d	5/1/2017		6/19/2017	
5		Prepare Test Specimen		0%	5d	5/1/2017		5/5/2017	

Note: As tasks finish earlier or later than the planned finished date which was baselined, the variance field will be updated.

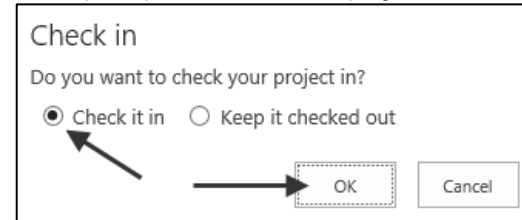
9. When the Save is complete, from the Task tab, select the Publish button.



10. When the Publish is complete, from the Task tab, select the Close button.



11. When prompted, Check in the project.

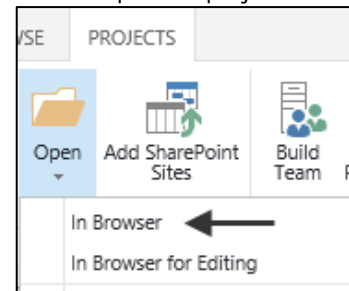


Note: Projects must be checked in when editing is finished. If they are not, they will remain in a checked out state and no other user will be able to make edits to the project.

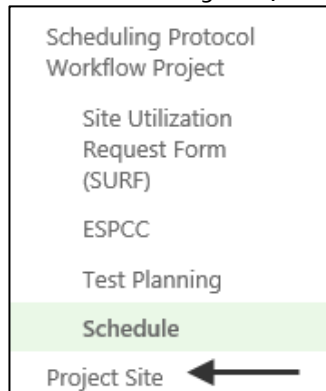
Accessing the Project SharePoint Site

When a project is created in the system, a project SharePoint Site is also created. The project SharePoint site is used for team collaboration which includes: OneNote notebook, announcements, document library, project calendar, and tracking of of issues, risks, and action items. All project documents should be stored on the project SharePoint site.

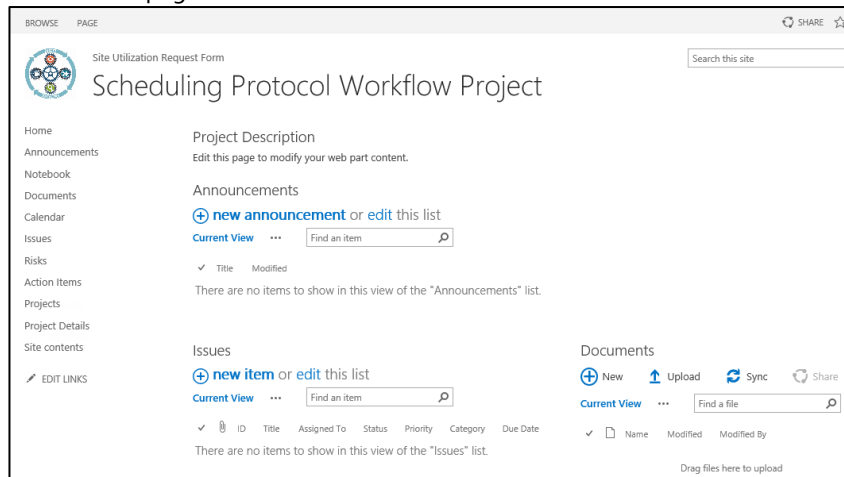
1. To open the SharePoint Site, highlight the row for the project and from the Projects tab, **Open** dropdown, select the option for **In Browser**. There is no need to open the project for editing to access the SharePoint site.



2. From the left navigation, select the Project Site link.



3. The SharePoint Site site will open in the same browser window. Each site contains many different sections that can be seen in the left navigation and on the homepage.



4. Navigation back to PWA can be done by selecting the **Projects** link in the left navigation. Additionally, the **Project Details** link in the left navigation will

bring you back to the specified project schedule.

