**User Guidance Document**

**Overview of the Automated Creation of Project Execution Plans:**

This is user guidance document, will support users in ensuring they are correctly equipped to use the automated PEP solution, by ensuring correct information is inputted into the Nintex solution and appropriate review and approval is complete prior to PEP being sent to the Client.

**Completing the Nintex Form:**

*Fields below are open text if not stated otherwise.*

* Client Name
* Consultancy Name
* Project Number – *Costpoint ID number*
* Project Name
* Date of Issue – *Date format dd/mm/yyyy*
* Contractor Name
* Architect Name
* Consultancy Name (Doc Owner)
* School Name and Location
* School Name
* City – *Geographical location*
* Client Contact Name
* DDD
* ABC
* Local Authority Name
* ABC City Council
* Project Location – *Geographical location*
* Project Manager Name
* Project Director Name
* Cost Manager Name
* CDM (H&S) Name
* Project Start Date – *Date format dd/mm/yyyy*
* Project End Date – *Date format dd/mm/yyyy*
* Project Background
* Project Constraints
* Project Objectives & Outcomes
* Scope of Works

**Completing the Roles and Responsibilities Section:**

Select all categories that apply, multiple if required.

**Activity Type:**

Enter in Date format dd/mm/yyyy OR N/A

**End Review Guidance:**

At the final review of the Project Execution Plan, please ensure to check that all the information highlighted in yellow is correct and make any manual changes where necessary. Once completed all amendments/fully reviewed please unhighlight all the text at once, instead of item by item, to ensure reduce time to review.

Additionally please ensure that page 1 (Document author, contributors, approved by and distribution to) is updated, as this page is not automated.