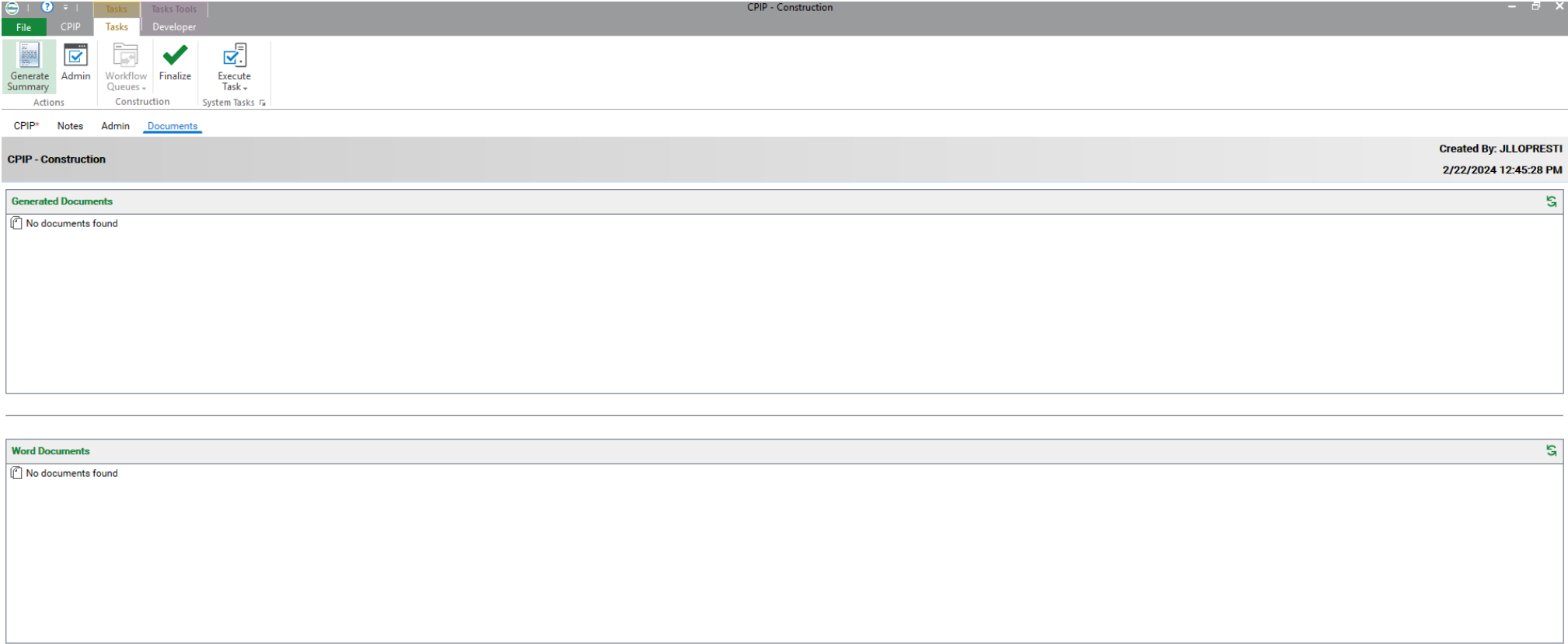


**Report Generation:**

The CPIP Summary document and the Project Detail Worksheet(s) can be generated during any stage of the process

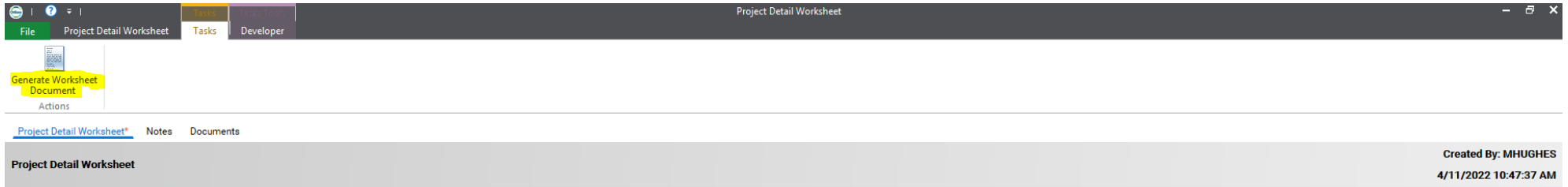
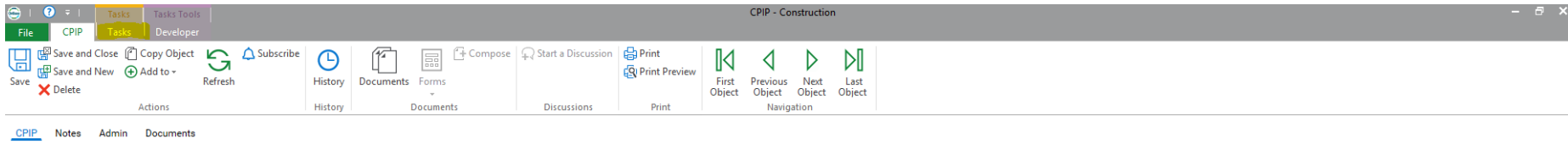
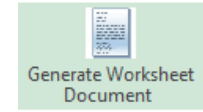
Stages: Construction, Submitted Pending Approval, Review Complete, and JBRC and SFAA Received

Before any documents are generated, the Documents tab at the CPIP level will reflect the below.



## Generate Project Detail Worksheet:

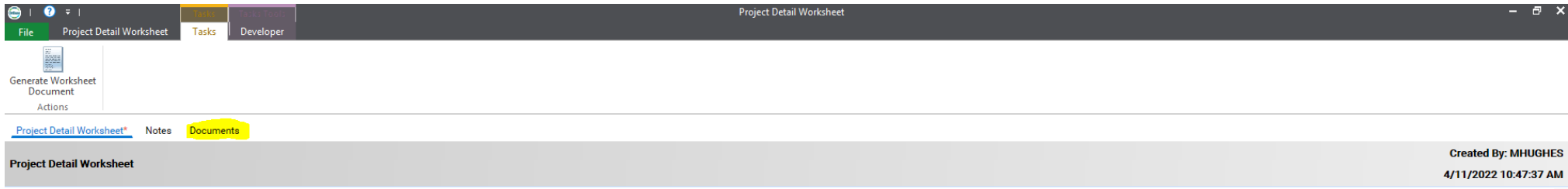
In the individual Project Detail Worksheet, click Tasks at the top and click Generate Worksheet Document



A Word document will open reflecting the Project Detail Worksheet. This is a preview to the document that was just generated

**\*Close out of this preview.\***

Click Documents **Documents** at the top of the screen

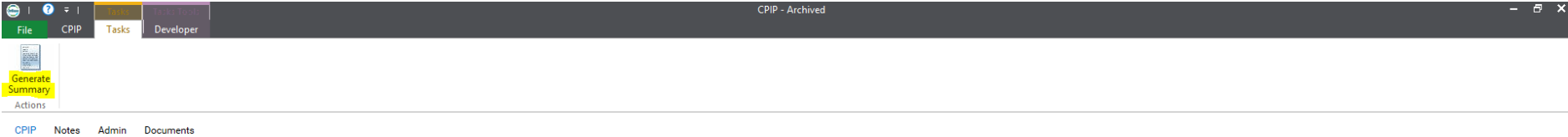


The PDF version of the Project Detail Worksheet will be reflected under Generated Documents, and the Word version of the Project Detail Worksheet will be reflected under Word documents.

The screenshot shows a software window titled "Project Detail Worksheet" with a ribbon menu containing "File", "Tasks", "Tasks Tools", and "Developer". The "Tasks" ribbon is active, showing a "Generate Worksheet Document" button. Below the ribbon, there are tabs for "Project Detail Worksheet\*", "Notes", and "Documents". The "Documents" tab is selected, displaying a header "Project Detail Worksheet" and "Created By: JLLOPRESTI 2/22/2024 1:05:53 PM". The main content area is divided into two sections: "Generated Documents" and "Word Documents". Each section contains a single document entry with a file icon and a filename: "[1]D500 - CBO - Project Detail Worksheet(PDF) - 2/23/2024 - 2025 - Wade Hampton Window Refurbishment - 1" and "[1]D500 - CBO - Project Detail Worksheet - 2/23/2024 - 2025 - Wade Hampton Window Refurbishment - 1".

**Generate Summary:**

**At the CPIP level, click Tasks at the top and click Generate Summary**



**A Word document will open reflecting the Summary. This is a preview to the document that was just generated**

**\*Close out of this preview.\***

**Click Documents Documents at the top of the screen**



**The PDF version of the Project Detail Worksheet will be reflected under Generated Documents, and the Word version of the Project Detail Worksheet will be reflected under Word documents.**

