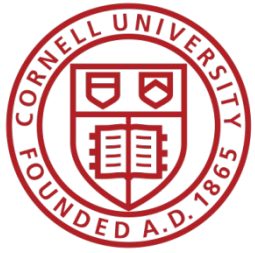


Project Management – Professional Development Series

Facilities and Campus Services
Engineering and Project Management
May 2026



Best Practices

Trimble Process Attachments





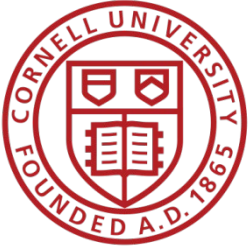
Purpose

Per University Policy and auditing purposes, each Trimble process requires the appropriate backup documentation attached to show why and how the work was requested.



Trimble Process Attachments

- All requests for pricing need to be requested in writing for all processes.
- Audit requires us to provide how the work was requested:
 - Scope of Work / RFP document
 - Email request
 - Meeting Minutes
 - Etc.



Trimble Process Attachments

The backup attachment should include:

- A detailed description of the request:
 - How you requested the Work
 - Should clearly define the Work
 - Any Drawings, RFI's, or other relevant attachments



Trimble Process Attachments

If the work was requested verbally, you should document it via email as soon as you can:

Hi,

following up on today's conversation. I want to make sure we're aligned.

- *Insert conversation / direction*

Please let me know if your understanding differs.



Trimble Process Attachments

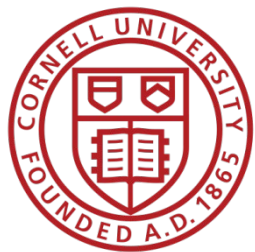
What this does:

- Provides the required backup documentation
- Documents your narrative first
- Opens door for correction
- Builds an airtight record

Verbal conversations are invisible



Facilities Contracts goal is to work together to reduce revisions and make the process move forward in a timely manner.



Questions?

