Minnesota State Colleges and Universities

Create Project

For more information contact System Office e-Builder Support in the Facilities website https://www.minnstate.edu/system/finance/facilities/design-construction/index.html.

Contents

Create e-Builder project

Creating a project in e-Builder starts in Workday. Project Manager, Project Manager Support logs into Workday and creates a project. Project will integrate into e-builder as a process in the *Project Creation project.

WORKDAY
• Create project (project integrate into e-Builder

E-BUILDER
• Project shows up in e-Builder as a process in the *Project Creation project .

E-BUILDER
• E-Builder Admin review Project Creation (PC) process
• Assign PC to College or University Project Manager.

E-BUILDER
• Project Manager review PC process, move to Finish
• Project is created in eBuilder

I. Create Project in Workday

Follow the steps below to create an e-Builder project in Workday.

The project name should start with your Institution/Campus acronyms.   The recommended format consists of three parts, with a maximum of 60 characters. **Institution/Campus-Year-Builder or Area Name with Work Scope. Reference Project Naming Structure, form PI.01 in the e-Manual,**
https://mnscu.sharepoint.com/sites/finance/SitePages/topic.aspx?topicID=122&state=about.

Colleges and Universities Acronyms

Acronym	Institution (location)	Acronym	Institution (location)
ALEX	Alexandria Techical College (Alexandria)	MSTA-DL	Minnesota State Community & Technical College (Detroit Lakes)
ANTC	Anoka Technical College (Anoka)	MSTA-FF	Minnesota State Community & Technical College (Fergus Falls)
ARCC-C	Anoka Ramsey Community College (Cambridge)	MSTA-M	Minnesota State Community & Technical College (Moorhead)
ARCC-CR	Anoka Ramsey Community College (Coon Rapids)	MSTA-W	Minnesota State Community & Technical College (Wadena)
BESU	Bemidji State University (Bemidji)	MWCTC-C	Minnesota West Community & Technical College (Canby)
NWTC	Northwest Technical College (Bemidji)	MWCTC-GF	Minnesota West Community & Technical College (Granite Falls)
CLAK-B	Central Lakes College (Brainerd)	MWCTC-J	Minnesota West Community & Technical College (Jackson)
CLAK-S	Central Lakes College (Staples)	MWCTC-P	Minnesota West Community & Technical College (Pipestone)
CENT	Century College (White Bear Lake)	MWCTC-W	Minnesota West Community & Technical College (Worthington)
DCTC	Dakota County Techical College (Rosemount)	NORM	Normandale Community College (Bloomington)
FDLT	Fond du Lac Tribal and Community College (Cloquet)	NHCC	North Hennepin Community College (Brooklyn Park)
HENN-EP	Hennepin Technical College (Brooklyn Park)	NLND-EGF	Northland Community & Technical College (East Grand Forks)
HENN-EP	Hennepin Technical College (Eden Prairie)	NLND-TRF	Northland Community & Technical College (Thief River Falls)
IHCC	Inver Hills Community College (Inver Grove Heights)	PINE	Pine Technical and Community College (Pine City)
LAKE	Lake Superior College (Duluth)	RIDG-H	Ridgewater College (Hutchinson)
METS	Metropolitan State University (Saint Paul)	RIDG-W	Ridgewater College (Willmar)
MPLS	Minneapolis Community and Technical College	RIVR-AL	Riverland Community College (Albert Lea)
HIBB	Minnesota Northe College - Hibbing Campus (Hibbing)	RIVR-A	Riverland Community College (Austin)
ITAS	Minnesota North College - Itasca Campus (Grand Rapids)	RIVR-O	Riverland Community College (Owatonna)
MESR-EV	Minnesota North College - Mesabi Eveleth Campus (Eveleth)	ROCH	Rochester Community and Technical College (Rochester)
MESR-V	Minnesota North College - Mesabi Virginia Campus (Virginia)	SAPA	Saint Paul College (St. Paul)
RRCC	Minnesota North College - Rainy River Campus (International Falls)	SOCT-F	South Central College (Faribault)
VERM	Minnesota North College - Vermilion Campus (Ely)	SOCT-NM	South Central College (North Mankato)
MSSE-RW	Minnesota State College-Southeast Technical (Red Wing)	SMSU	Southwest Minnesota State University (Marshall)
MSSE-W	Minnesota State College-Southeast Technical (Winona)	SCSU	St Cloud State University (St. Cloud)
MOOR	Minnesota State University Moorhead (Moorhead)	SCTC	St Cloud Technical and Community College (St. Cloud)
MANK	Minnesota State University, Mankato (Mankato)	WINS	Winona State University (Winona)

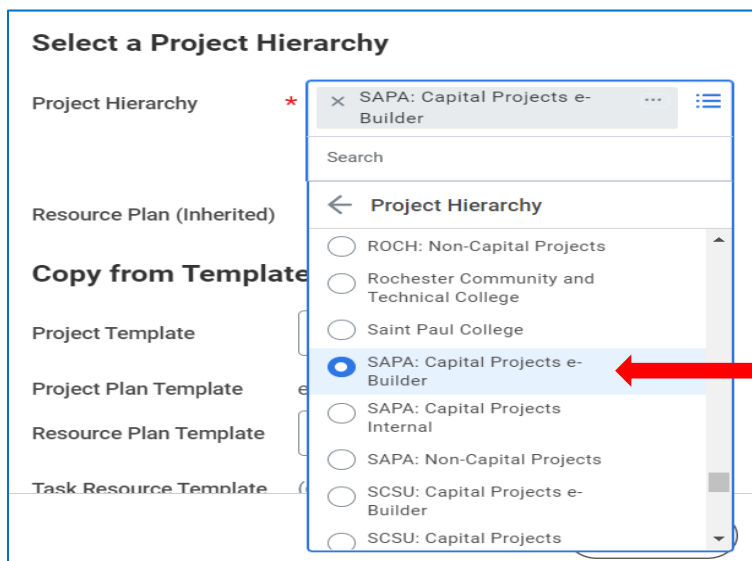1. Type "Create Project" in the search bar and select the task.
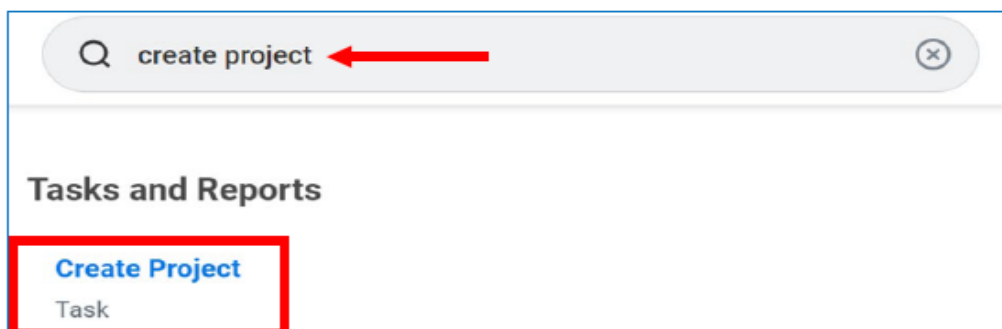
2. Select the appropriate Project Hierarchy, Project Template, and Project Plan Template. Note that you are required to select a Project Template only for Capital Projects. Then click OK to proceed.
   - Click Project Hierarchy: from the drop-down, select your institution
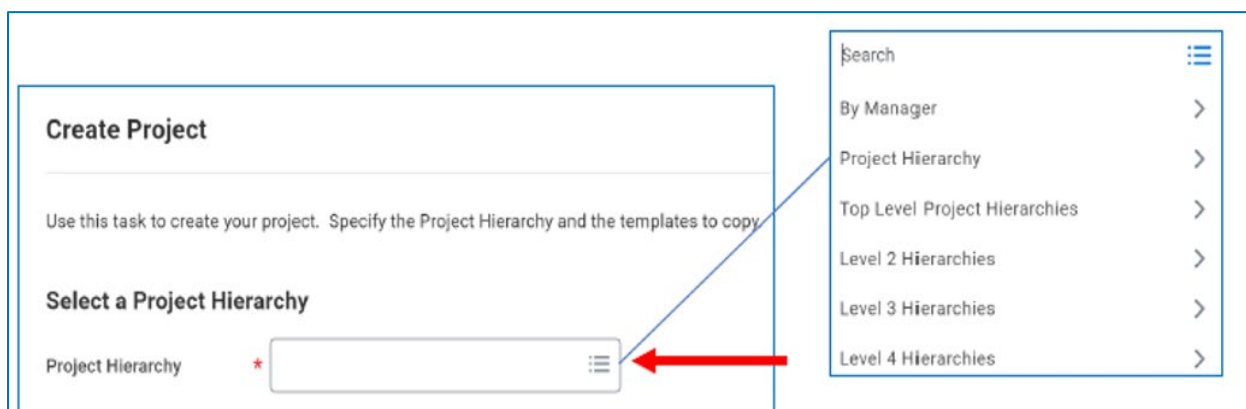
   - Select your Institution Hierarchy.

- Select Project Template. Click Search, from the drop-down, select Templates with Association.

Select a Project Hierarchy

Project Hierarchy   *   ✕ SAPA: Capital Projects e-Builder   ...   ☰

Resource Plan (Inherited)   (empty)

Copy from Templates

Project Template | Search   ☰ |
                    | All   > |
Project Plan Template | **Templates with Association** |
Resource Plan Template | Templates without Association > |

Task Resource Template   (empty)

- Select eBuilder Capital Project, Click OK.

Create Project   ✕

Use this task to create your project. Specify the Project Hierarchy and the templates to copy.

Select a Project Hierarchy

Project Hierarchy   *   ✕ SAPA: Capital Projects e-Builder   ...   ☰

Resource Plan (Inherited)   (empty)

Copy from Templates

Project Template   ✕ eBuilder Capital Project ...   ☰

Project Plan Template   eBuilder Construction Plan

Resource Plan Template   ☰

Task Resource Template   (empty)

Cancel   OK

3. Under the Project Summary section, enter the required details and relevant information by completing the following:

- **Project Name**: Enter an appropriate project name. **The recommended format consists of three parts, with a maximum of 60 characters.** *Institution/Campus-Year-Builder or Area Name with Work Scope. Reference Project Naming Structure, form PI.01 in the e-Manual, https://mnscu.sharepoint.com/sites/finance/SitePages/topic.aspx?topicID=122&state=about. Example: MNSU-14-Morris Hall Addition HVAC Upgrade*

- **Start Date**: Will auto-populate with the current date. You may choose to change this date. Start Date indicates the date the project started.

- **Status**: Select the "Active" status.

- **Owner**: Will auto-populate with your name.

- **Description**: Type a brief description of the project.

Create Project

Link to Job Aid here -> Capital Projects
Hosted on Minnesota State Connect

∨ **Project Summary**

Project Name *	SAPA-2025-Minnesota Test 1
Start Date *	06/24/2024
End Date	MM/DD/YYYY
Status	✕ Active ···
Owner	✕ Mailor K Moua ···
Description	This is a test project for user guide.

4. Under the Reference Information section, enter the required details and relevant information by completing the following:
   - Project Hierarchy: Auto-populates based on the project hierarchy selected.
   - Include Project ID in Name: This will include the Project ID when shows up in e-Builder.
   - Billable: The checkbox will auto-populate based on the project template selected. You may clear this checkbox if this is not a billable project.
   - Capital: The checkbox will auto-populate based on the project template selected. You may clear this checkbox if this is not a capital project.
   - Company: Select the applicable Institution from the drop-down list.
   - Project Currency: Will auto-populate.
   - Balancing Worktag: Auto-populates based on the project template selected. **Verify that the Worktag showing in the field matches the Worktag for the project in the Worktag section in the project summary page.**
   - Project Groups: Auto-pouplates base on the project template selected.

5. Scroll down to the Worktags tab. Select the appropriate Default Worktags for the project. Note that Default Worktags may auto-populate based on the project template.
   - Cost Center: it is like a department or unit as designated by the College or University. Select the appropriate Cost Center from the drop-down list. *(Note: This is not the same as the Cost Center from ISRS)*
   - Fund: the appropriate funds from the drop-down list (i.e. FD0118, 2020 HEAPR).
   - Function: select the appropriate function from the drop-down list. (i.e. FN710 – Physical Plant Operation or FN980 – Capital Construction) *(Note: Formerly known as Program Code from ISRS.)*

6. Click Submit. This will complete the project creation in Workday. Project will interface into e-Builder. If the initiator is not the Project Manager, once Submit is clicked, the project will route to the Project Manager for approval first in Workday before it interfaces into e-Builder.

Create Project: SAPA-2025-Minnesota Test
1 on 06/24/2024 within SAPA: Non-Capita...

Up Next: Project Manager | Review Project | Due Date
06/26/2024

View Details

⚠ **Alerts: 1**   View All ∨

7. Project Manager approves the project in Workday **if Project Manager is not the initiator**. Click the relevant inbox item to view its contents (i.e., the item that indicates the requirement to Approve the Created Project). Review the details and click Approve.

II. Finish Creating a Project in e-Builder from Workday.

When Project Manager starts a project in Workday, it will interface into e-Builder as a process called Project Creation (PC) in the project named *Project Creation.   The e-Builder Admin will get a notification and will complete the project setup in e-Builder.

1. E-Builder Admin completes the project setup in e-Builder. An email will be sent to the Project Manager.
2. Project Manager will be responsible for the following:
    a. add the rest of the users to the project.
    b. Work with Business office to add funding source(s) to the project.
        i. **Campus funded,** have your business office Create a Budget Amendment to add funds to the project.
        ii. **HEARP or GO funded,** work with your Program Manager to develop a Project Budget Worksheet (PBW) first.
            1. Then starts the Project Initiation (PI) process in e-Builder to request the release of the fund.
            2. Work with your Business office to create Budget Amendment once email confirmation is received.
    c. Once the funding source(s) is in e-Builder, Commitment process can be created.