



**MINNESOTA STATE**



## 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

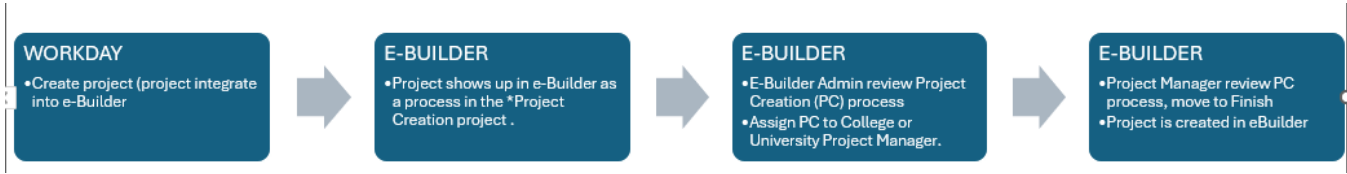
Create e-Builder project .....3

I. Create Project in Workday.....3

II. Finish Creating a Project in e-Builder from Workday..... 10

# 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.



## I. Create Project in Workday

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

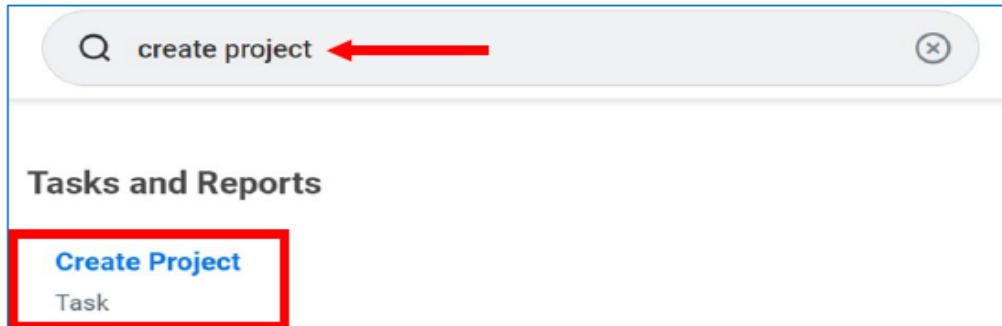
The project name should start with your Institution/Campus acronyms. The recommended format consists of three parts, with a maximum of 60 characters. **Institution/Campus-Year-Builder or Area Name with Work Scope. Reference Project Naming Structure, form PI.01 in the e-Manual,**

<https://mnscu.sharepoint.com/sites/finance/SitePages/topic.aspx?topicID=122&state=about>.

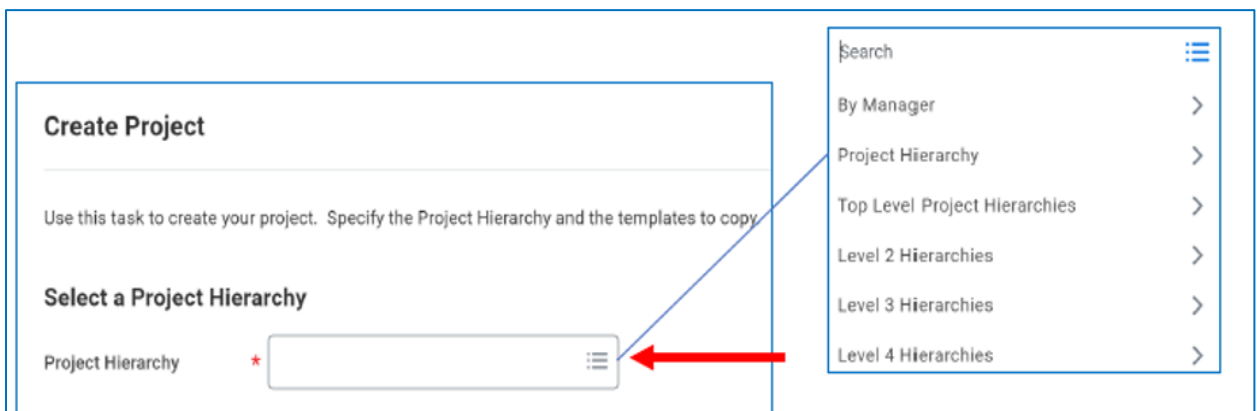
### Colleges and Universities Acronyms

Acronym	Institution (location)	Acronym	Institution (location)
ALEX	Alexandria Technical 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 Technical 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 North 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)

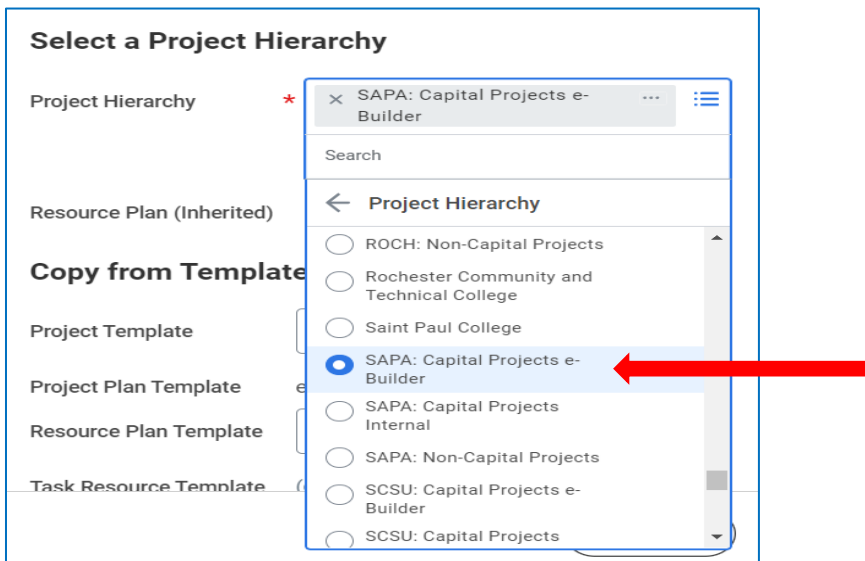
1. Type "Create Project" in the search bar and select the task.



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 \* x SAPA: Capital Projects e-Builder

Resource Plan (Inherited) (empty)

**Copy from Templates**

Project Template Search

Project Plan Template All

Resource Plan Template Templates with 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 \* x SAPA: Capital Projects e-Builder

Resource Plan (Inherited) (empty)

**Copy from Templates**

Project Template x 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://mnsu.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 about 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. You may change the balancing worktag if needed.
- Project Groups: Auto-pouplates base on the project template selected.

The screenshot shows a form titled "Reference Information" with the following fields and values:

- Project Hierarchy:** \* SAPA: Non-Capital Projects (indicated by a red arrow)
- Optional Project Hierarchies:** (empty)
- Project ID:** (empty)
- Include Project ID in Name:**  (indicated by a red arrow)
- Inactive:**
- Billable:**
- Capital:**  (indicated by a red arrow)
- Company:** X CU0206 Saint Paul College ... (indicated by a red arrow)
- Project Currency:** X USD ... (indicated by a red arrow)
- Customer:** (empty)
- Balancing Worktag:** \* X Fund: FD0039 General Operations (indicated by a red arrow)
- Optional Balancing Worktags:** (empty)
- Project Groups:** X Construction ...  
X eBuilder ... (indicated by a red arrow)
- External Project Reference:** (empty)
- Prerequisite For:** (empty)
- Dependencies:** (empty)

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. Capital Projects require a Location Worktag.
  - Cost Center: it's 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 Cost Center from ISRS**)
  - Fund: the appropriate funds from the drop-down list ( i.e. 2020 HEAPR or 2025 campus funded).
  - Function: select the appropriate function from the drop-down list. (**Note: Formerly known as Program Code from ISRS.**)

The screenshot shows a 'Worktags' tab with a table of 'Worktag Types'. The 'Function' row is highlighted. Three red arrows point to the dropdown menus for 'Cost Center', 'Fund', and 'Function'.

Worktag Type	Default Worktag
Cost Center	× CC0002494 SAPA - Phys Plant Operation ...
Fund	× B18 - FY18 GO Bond Appropriation
Function	× FN000 Default ...
Activity	
Allocation CIP	
Location	
Grant	

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 before it interfaces into e-Builder.

The screenshot shows the same 'Worktags' tab as above, but with the 'Submit' button highlighted by a red box. The 'Function' row is still highlighted in blue.



Buttons: **Submit** (highlighted), Save for Later, Cancel



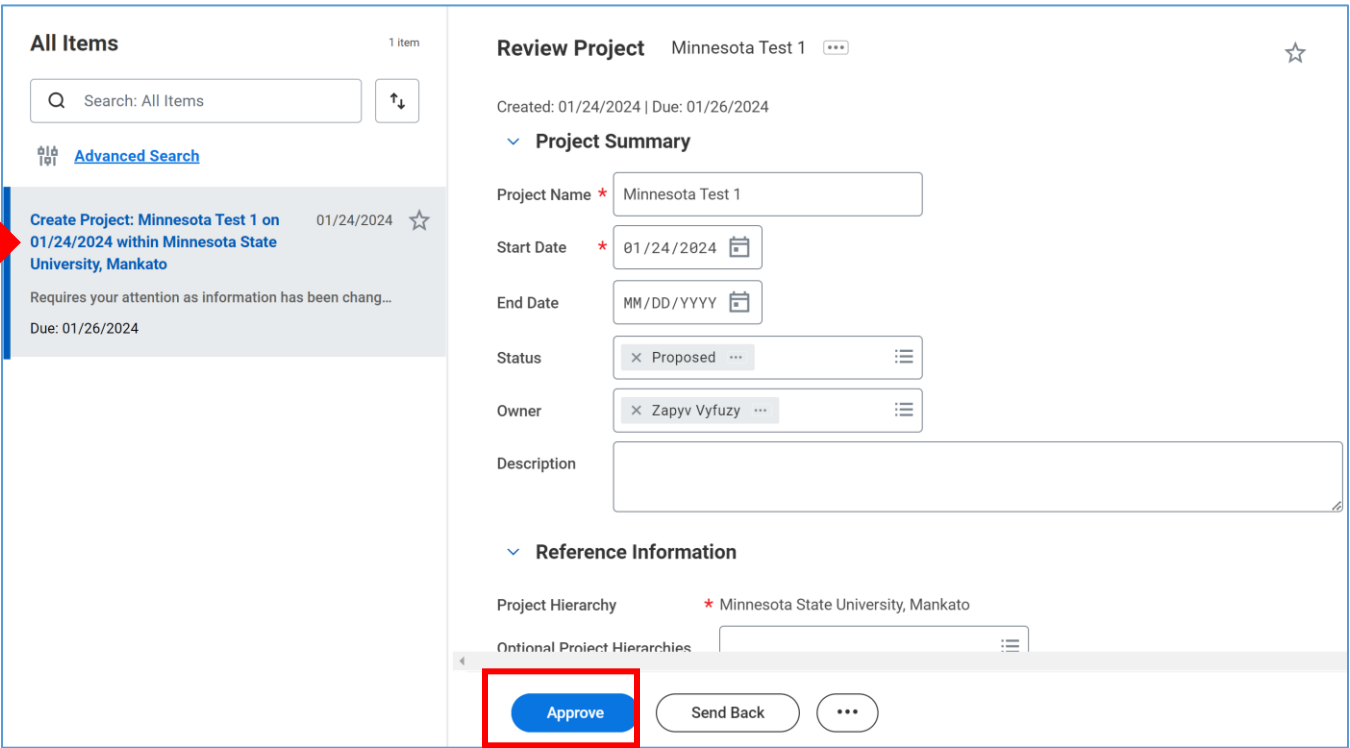
**Create Project: SAPA-2025-Minnesota Test 1 on 06/24/2024 within SAPA: Non-Capita...**

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.



The screenshot displays the Workday interface for reviewing a project. On the left, the 'All Items' list shows a single item: 'Create Project: Minnesota Test 1 on 01/24/2024 within Minnesota State University, Mankato'. A red arrow points to this item. The main panel, titled 'Review Project Minnesota Test 1', shows the project's details. The 'Project Summary' section includes fields for Project Name (Minnesota Test 1), Start Date (01/24/2024), End Date (MM/DD/YYYY), Status (Proposed), and Owner (Zapyv Vyfuzy). The 'Reference Information' section shows the Project Hierarchy as Minnesota State University, Mankato. At the bottom, the 'Approve' button is highlighted with a red box, along with 'Send Back' and a menu icon.

## 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 call Project Creation (PC) in the project named \*Project Creation. The e-Builder Admin will get a notification. E-Builder Admin will go into the \*Project Creation project and route the PC process to the Project Manager of the college or University.

1. E-Builder Administrator review PC process and assign it to the Project Manager. E-Builder Administration review the PC process, apply templates and assign it to the relevant Project Manager at the institution.

### Z - Project Creation (PC) - 46

Project: *Project Creation Process Document: PC - 46 Current Workflow Step: Data Entry 1 Show Workflow Diagram Subject: SYSO - 24- Project guide test #2 - PR0000061 - PR0000061 Status: Submitted		Overall Due Date: Step Due Date:
--	--	-------------------------------------

-- Please select an action -- Take Action

---

[Details](#) | [Comments \(0\)](#) | [Documents \(0\)](#) | [Attached Processes \(0\)](#) | [Attached Forms \(0\)](#) | [Attached To \(0\)](#)

Expand All | Collapse All

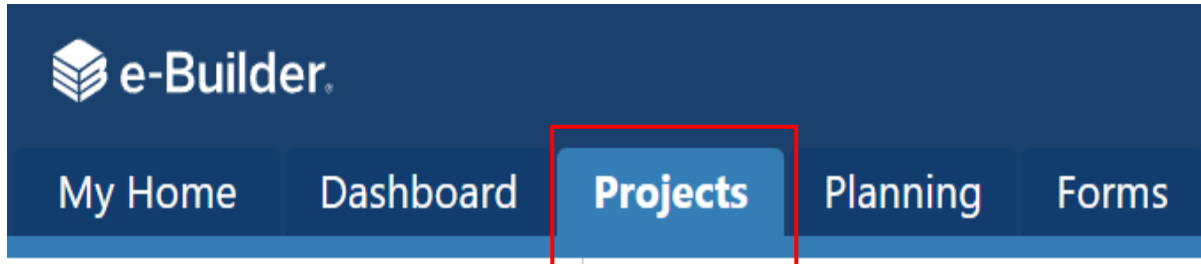
#### Data Fields

Proposed Project Name:	SYSO - 24- Project guide test #2 - PR0000061
e-Builder Project Administrator:	Mailor Moua
Project Status:	Active
Institution:	System Office
Company ID:	0000
Campus:	MnSCU Multiple-000
Facility Financial Type:	GO Bond Revenue Bond Fund Revenue Operating Fund <b>Campus Fund</b> Other
Project Document Template:	-- Please select an option --
Schedule Template:	-- Please select an option --
Budget Template:	-- Please select an option --
Cash Flow Template:	N/A
Funding Template:	N/A
Project Interface Flag:	No
Building (at Institutions A - H):	
Building (at Institutions I - M):	
Building (at Institutions N - R):	
Building (at Institutions S - W):	
Success:	This is a test project to use screenshot for guide
Project Description:	Project Manager
Schedule Manager Role:	
Schedule Manager:	
Workday Project ID:	PR0000061
Project Manager:	Mailor Moua

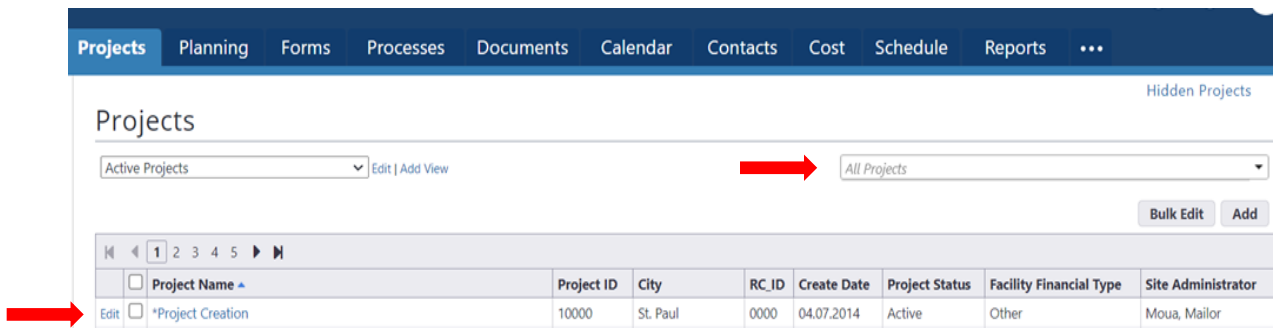
-- Please select an action -- Take Action

2. Project Manager Review project in PC process and complete the Project Creation in e-Builder.

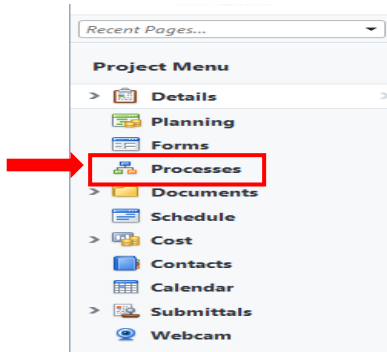
- Click **Projects** from the Top Navigation tabs.



- Select the project named \*Project Creation from the list or the drop-down.



- Select **Processes** from the Project Menu



- Filter for Project Creation (PC) process
  - a. Under Filters on the right-hand side of the screen
  - b. Click in the box under "Process", a drop-down list of all processes will be displayed.
  - c. Select PC: z – Project Creation
  - d. Select the radio button next to "All Processes"
  - e. Check "Draft", and "Open", you will see all PC processes in Draft and Open status on the left of the Filters area.

- f. Click on your project process Instance. **Note: Project Name, Project ID are integrated from Workday.**

Project Processes \*Project Creation - 10000

Start PC Start process

Filter by... Draft Open

PROCESSES REPORTS

Instance	State	Subject
PC - 46	Open	SYSO - 24- Project guide test #2 - PR0000061 - PR0000061

Page View 50 Showing result 1 - 1 of 1

Filters (3)

- Process
- PC : z - Project Creation
- PC : z - Project Creation
- All Processes
- In My Court
- Initiated By Me
- Draft
- Open
- Closed

- Review all the information on the page. Verify Project Manager and Facility Financial Type are accurate. Click **“Take Action”** to move it to the next step.

Process Document: PC - 46  
 Current Workflow Step: Project Mgr Review  
 Subject: SYSO - 24- Project guide test #2 - PR0000061 - PR0000061  
 Status: Submitted

Overall Due Date:  
 Step Due Date:

Details Comments (0) Documents (0) Attached Processes (0) Attached Forms (0) Attached To (0)

Expand All | Collapse All

**New Project Details**

Proposed Project Name: SYSO - 24- Project guide test #2 - PR0000061  
 Workday Project ID: PR0000061  
 Project Description: This is a test project to use screenshot for guide

**New Project Campus/Building**

Institution: System Office  
 Company ID: 0000  
 Campus: MnSCU Multiple-000

Building (at Institutions A - H):  
 Building (at Institutions I - M):  
 Building (at Institutions N - R):  
 Building (at Institutions S - W):

**Additional Project Details**

Project Interface Flag: Yes  
 \* Project Manager: Mailor Moua  
 \* Facility Financial Type: HEAPR  
 GO Bond  
 Revenue Bond Fund  
 Revenue Operating Fund  
 Campus Fund

Note: Please hold Ctrl to select multiple items from the list.

**Templates**

Budget Template: MNSTATE Budget Template  
 Schedule Template: Schedule Template - Milestone Dates  
 Project Document Template: TEMPLATE - MINNESOTA STATE

Approve Take Action Check Spelling Print

- The Project Creation (PC) process is at the Finish. A new project has been created in e-Builder under your institution. To open the created project:
  - a. Click **Projects** from the Top Navigation tabs.
  - b. Click on the project in the list or click on the drop-down box on the right-hand and select the project.

The screenshot shows the e-Builder interface. The top navigation bar includes 'My Home', 'Dashboard', 'Projects', 'Planning', 'Forms', 'Processes', 'Documents', 'Calendar', 'Contacts', 'Cost', 'Schedule', and a menu icon. The 'Projects' tab is active. Below the navigation bar, there is a sidebar with the Minnesota State logo and a 'Recent Pages...' dropdown. The main content area is titled 'Projects' and contains a table of project entries. A red arrow points to the first row of the table, which is highlighted with a red border.

<input type="checkbox"/>	Project Name	Project ID	Site Administrator
Edit <input type="checkbox"/>	*Project Creation	10000	Moua, Mailor
Edit <input type="checkbox"/>	MCTC CFP and UMP test workday	PR0000034	Moua, Mailor
Edit <input type="checkbox"/>	SO-24-WFP Office Redesign	123495	Pliska, Justine
Edit <input type="checkbox"/>	SYSO - 24- Project guide test #2 - PR0000061	PR0000061	Moua, Mailor