



## MINNESOTA STATE COLLEGES AND UNIVERSITIES

### DESIGN AND CONSTRUCTION



### CREATING A PROJECT

Step-by-step instructions how to create a project in e-Builder.

#### Steps:

1. Add a New Project and Enter Project Details
2. Apply Templates
3. Add Project Participants to the project
4. Approve a Zero Budget
5. Apply Schedule Dates
6. Start Project Initiation

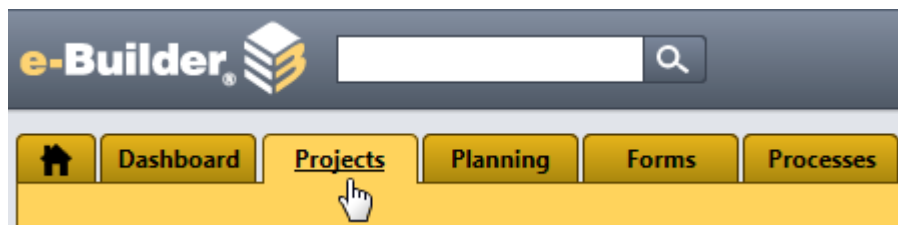
#### Add a New Project

#### This task can be completed by:

- Account and Project Administrators
- Participants with 'Add Project' Permission
  - ✓ Participants with Add Permission would include project managers and project manager support roles.

#### To add a new project:

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



2. Click **Add** located on the right side of the page.



The Add Project page displays.

The screenshot shows the "Add Project" form. At the top right, there are three buttons: "Check Spelling", "Save", and "Cancel". The form is divided into two main sections: "Details" and "Custom Fields (51)".

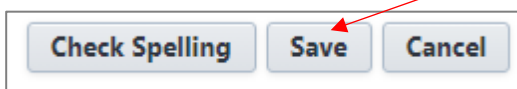
**Details Section:**

- Project Name:** A text input field.
- e-Builder Project Administrator:** A dropdown menu with "Moua, Mailor" selected.
- Description:** A large text area.
- Project Status:** A dropdown menu with "Select project status..." selected.
- Project Photo:** A "Choose file" button and the text "No file chosen".
- Address:** A text input field.
- City:** A text input field.
- State / Province:** A text input field.
- Zip / Postal Code:** A text input field.
- Country:** A dropdown menu.
- Start Date:** A date picker.
- Target Date:** A date picker.
- Project Webcam URL:** A text input field.

**Custom Fields (51) Section:**

- Project ID:** A text input field.
- Project Interface Flag:** A dropdown menu with "Please select..." selected. A red arrow points to this field from the text below.
- Campus File Number:** A text input field.
- Institution:** A dropdown menu with "Please select..." selected.
- RC/D:** A dropdown menu with "Please select..." selected.
- Campus:** A dropdown menu with "Please select..." selected.
- Campuses (IF Multiple selected):** A text input field.

3. Complete the project detail page as much as possible. Return to this page to add additional information as it becomes available during the life of the project. All fields will aid in reporting results.
4. Select **YES** value in the **Project Interface Flag** field. This action will automatically fill in the **Project ID** field when you click on **Save**.
5. After filling in the project details, click **Save**.

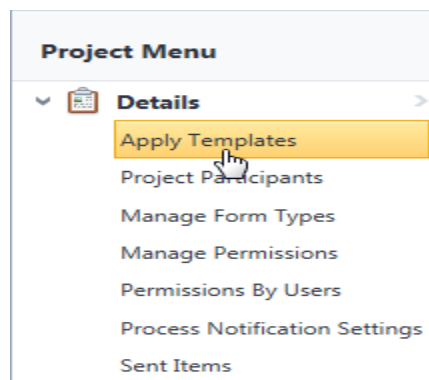


### ***Apply Project Template***


Applying a project template allows you to pull in the document folder structure, apply participants, setup the project budget worksheet and assign a schedule to the project as required when creating a new project in e-Builder.

#### **To apply a project template:**

1. From the **Project Menu**, click **Apply Templates** under the **Details** option.



The Apply Templates page displays.

 **Note:** These templates will be applied to the selected project(s), which will take a few minutes to process. For your convenience, an email will be sent to you when the process is complete. Please refrain from making changes to the templates during this time as updates will not be reflected in the project(s) that have already been processed.

2. The only fields you need to complete are as follows and illustrated in the screenshots below:
  - **Project template – Select *TEMPLATE-MINNESOTA STATE***
  - **Schedule template** - There are three schedule templates. Select the appropriate template to use for the project.
    1. **Schedule Template – CM at Risk:** select this template for CM at risk project.
    2. **Schedule Template – HEAPR:** select this template for HEAPR project.
    3. **Schedule Template – Milestone Dates:** select this template for projects that are not CM at risk or HEAPR.

- **Budget template** – there are two budget templates.
  1. **MNSTATE Budget Template:** use this template for all projects.
  2. **HEAPR Budget Template:** use this template for small HEAPR project.

3. Select the **high-lighted** fields only.

### Apply Templates to Project(s)

**Note** These templates will be applied to the selected project(s), which will take a few minutes to process. For your convenience, an email will be sent to you when this process is complete. Please refrain from making changes to the templates during this time, as updates will not be reflected in the project(s) that have already been processed.

Project Name	Project Administrator	User Logins Allowed	Has Schedule
*Training Guides	Moua, Mailor	✓	✓

Apply Templates Cancel

Select a project template

Select items to import

Select a role template

Select a schedule template

Choose where to add the template

Select a budget template

Select a cash flow template

Select a funding template

Select a custom field. ▼ Select a value ▼

TEMPLATE - MINNESOTA STATE ▼

Users

Include Project Level Roles

Project Groups

Document Folders

Permissions

Apply Folder Permissions to Files ?

Folder Subscriptions

Copy Files

Calendar Settings with Exceptions

Project Level Options for Custom Fields and Process Data Fields ?

Please select... ▼

Schedule Template - Milestone Dates ▼

Add as a last task in the schedule

Add as a subtask of Please select... ▼

Insert above Please select... ▼

Insert below Please select... ▼

MNSTATE Budget Template ▼

Please select... ▼

Please select... ▼

Apply Templates Cancel

Note: “Select a schedule template” reveals additional required fields for selection. Select the Project Manager role and then Select your name as the manager user.

Select a schedule template

\* Select a manager role ?

\* Select a manager user ?

Schedule Template - Milestone Dates ▼

Project Manager ▼

pm,mm pm ▼

4. When complete, Click **Apply Templates** button.

Apply Templates

Cancel

### **Add Project Participants**

#### **This task can be completed by:**

- *Account and Project Administrators*
- *Participants with 'Manager Users' Permission*
  - ✓ *Participants with Manager Users Permissions would include project manager support roles.*

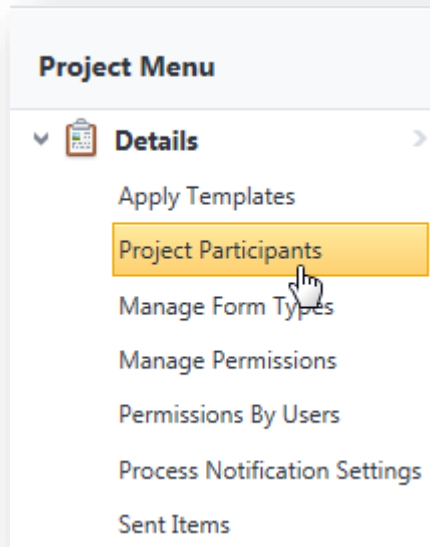
Project membership is necessary for participants to access and work in the project. Participants can be added to a project at any time.

**NOTE: The template you apply will have base staff that will be added as members to the project automatically. You will add additional members and associate all members as participants to the project. The process is to:**

- 1. Add Members**
- 2. Associate Members as Participants to the Project**

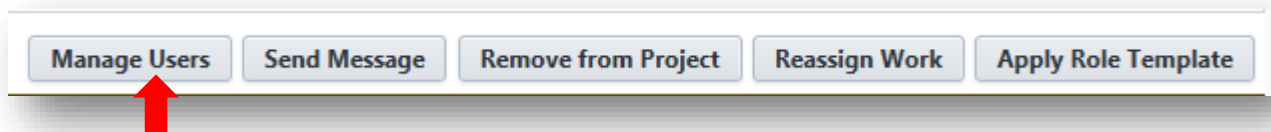
#### **To Add Members:**

1. From the **Project Menu**, click **Project Participants** under the **Details** option.



The Project Participants page displays.

2. Click **Manage Users**.



3. From the **Available Users** filter page, search, and select the users to add as Participant(s) to your project. Highlight the name, then click the right directional arrow to add them to the adjacent **Project Users** box.

The Manage Users window appears. All existing project participants appear in the right pane view of the **Project Users** box.

## Manage Users

**SYS training project** Add New User

**Available Users**

Filter Users

Company starts with system

Select a custom field Select a value

Filter

- AE Sub, mm -- mmAesub -- System
- cm, mm -- mmcm -- system office
- CU Admin, CU Admin -- CU Admin -- System Office**
- CU Finance, Test -- mmCUFinance -- System office
- Harper, Robert -- robert.harper@minnstate.edu -- System Office
- Legal Review, MM -- legalreview -- system office
- MNSCUREports, MNSCUREports -- MNSCUREports -- System Office
- other, mm consultant -- mm consultant other -- System Office
- Payable, MM Accounts -- mm AP -- System Office
- Reid, Lori -- Lori.Reid@so.mnscu.edu -- System Office

Removed Users

Notify users removed from site

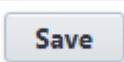
**Project Users**

- Harrison, Summer -- ru6283yo -- Minn State System Office
- Huiett, Karen -- karen.huiett@minnstate.edu -- MinnState System Office
- Kirchoff, Kathy -- Kathy.Kirchoff -- MinnState System Office
- Morgan, James -- James.Morgan@minnstate.edu -- MinnState System Office
- Moua, Mailor -- Mailor.Moua@minnstate.edu -- MinnState System Office
- Olsen, Terry -- um6613rx -- MinnState System Office
- Pliska, Justine -- ca6137yg -- MinnState System Office

Notify users added to site

Include login info

4. Click **Save**.



### Associate Members to the Project:

1. From the **Project Participants** page, click on the new participant **Name**.

**Project Participants For** Training Guides - 12815

**Groups**

Create | Rename | Delete

- Administrators
- Members

**Roles**

- A/E
- Accounts Payable
- Adoption Dashboard/Reports
- AE Sub
- Auditor
- Commissioning Agent
- Construction Manager
- Consultant - Haz Mat
- Consultant - Other
- Contractor - Haz Mat
- Contractor - Other

**Members**

First Name:

Last Name:

Username:

Company:

Custom Field:

Filter Clear

Manage Users Send Message Remove from Project Reassign Work

Apply Role Template

<input type="checkbox"/>	Name	User Name	Company Name	Date Added
<input type="checkbox"/>	mm ae ae	mm ae	Tester	11.01.2019
<input type="checkbox"/>	<b>mm AE Sub</b>	mmAesub	System	11.01.2019
<input type="checkbox"/>	mm cm	mmcm	system office	11.01.2019
<input type="checkbox"/>	mm contractor con	mm contractor	Tester	11.01.2019
<input type="checkbox"/>	Test CU Finance	mmCUFinance	System office	11.01.2019
<input type="checkbox"/>	SO Finance	mmSOFinance	MinnState System Office	11.01.2019

The User Details page will appear.

2. Click on the **Manage Membership** button.

**User Details**

---

**Member Profile** **Manage Membership** Edit Cancel

First Name:	mm contractor	Company:	Tester
Last Name:	con	Email Address:	ebuildersupport@so.mnscu.edu
User Name:	mm contractor		

**Business Information**

Type of Business:	General Contractor / Design Builder	Title:	
Department:		Business Address:	33 Fake Street
P.O. Box/Suite:		City:	Fake City
State/Province:	Minnesota	Country:	
Postal/Zip Code:	55101	Office Phone:	333.333.3333
Office Fax:		Business Cell Phone:	
Business Pager:			

Custom Fields (0) **Project Membership** Role Membership Group Membership

There are no custom fields for this user.

**Manage Membership** Edit Cancel

3. Click on the **Project Roles** Tab.

**Manage Membership for mm contractor con**

Projects Account Roles **Project Roles** Role Templates Save Cancel

Roles  
Contractor - Prime

All Projects	Selected Projects
*Current Vendor Training Project	<b>Contractor - Prime</b>
*mailor 8-27	*Current Vendor Training Project
*mailor test	*Training Project
*Training Guides	
*Training Project	

> <

Save Cancel

4. Click on the **Roles** drop down box and select the participant role for the participant.
5. In the left window, highlight the "Project" the participant will be associated to and using the arrow move it to the **Selected Projects** window pane on the right.
6. Click **Save**.

Save



Approve zero (0) budget.

**This task can be completed by:**

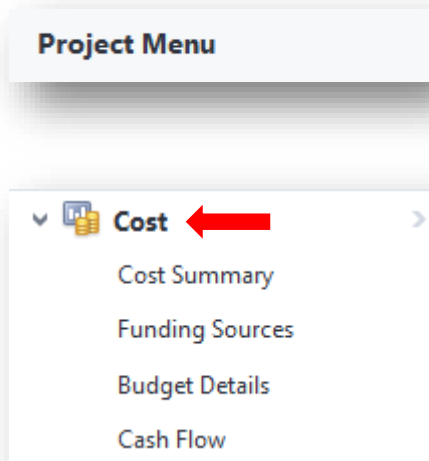
- Account and Project Administrators
- Participants with 'Manager Users' Permission
  - ✓ Participants with Manager Users Permissions would include project manager support roles.

The Budget in e-Builder is the digital form of your budget worksheet information.

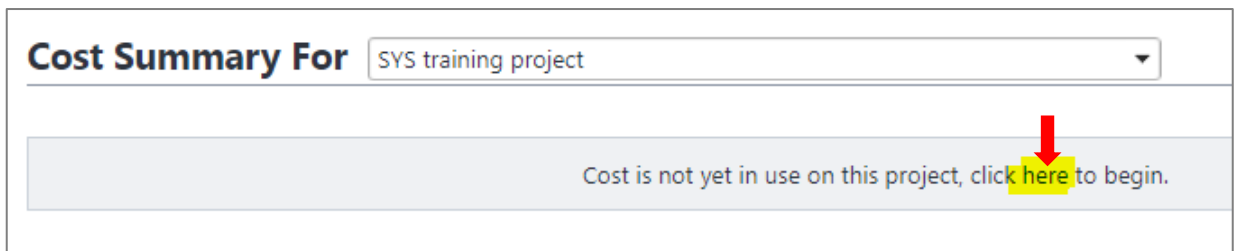
**Note: You can make changes to this budget at any time.**

To configure and approve a zero budget worksheet:

1. From the **Project Menu**, click **Cost**.



The Cost Summary screen will be displayed.



2. Click the word **“here”** in the sentence in the grey area. The Budget Details window appears. All zero Budget Line Items will be visible on the page.

**Budget Details For** SYS training project

Project:	SYS training project	Status:	Draft
Draft Created:	11.17.2020 (Mailor Moua)	Budget Control:	Uncontrolled
Description:			

Expand All | Collapse All | Group By: Category | Show Filter

Show All 55 items in 1 pages

Line Item	Description	Assumption	Allow Charges	Approval Required For Change ?	Original Budget
<input type="checkbox"/> 01	<b>Property Acquisition</b>				0.00
<input type="checkbox"/> 01.5000	Property Acquisition-Land Purchase		<input checked="" type="checkbox"/>		0.00
<input type="checkbox"/> 01.5010	Property Acquisition-Perpetual Easements		<input checked="" type="checkbox"/>		0.00
<input type="checkbox"/> 01.5205	Property Acquisition-Building Purchase		<input checked="" type="checkbox"/>		0.00
<input type="checkbox"/> 02	<b>Predesign Fees</b>				0.00
<input type="checkbox"/> 02.1529	Predesign Fees-Architect & Engineering Service		<input checked="" type="checkbox"/>		0.00
<input type="checkbox"/> 03	<b>Design Fees</b>				0.00
<input type="checkbox"/> 03.1530	Design Fees-Architect & Engineering Service		<input checked="" type="checkbox"/>		0.00
<input type="checkbox"/> 03.1583	Design Fees-Reimbursables		<input checked="" type="checkbox"/>		0.00
<input type="checkbox"/> 04	<b>Project Management</b>				0.00
<input type="checkbox"/> 04.0110	Unclassified Full-Time Salary		<input checked="" type="checkbox"/>		0.00

3. Click **Approve** button in the upper right corner of the page.

4. Confirm by adding **Approval Date** and clicking on the button **Yes, Approve the Budget**.

**Budget Details For** SYS training project

**Confirm Approval**

Are you sure you want to approve the budget?

Approval Date  [ 11.18.2020 ]

Add a note:

5. Use the workflow process **Budget Initiation (BI)** to add amounts to the budget worksheet. This is optional. If you choose not to do the BI process, upload your Project Budget Worksheet into the folder in e-Builder.

### *Schedule Template*

#### **This task can be completed by:**

- *Account and Project Administrators*
- *Participants with 'Manager Users' Permission*
  - ✓ *Participants with Manager Users Permissions would include project manager support roles.*

This is the project schedule

 **Note: You can make changes to this schedule at any time.**

**Next step – Project Initiation (PI) Workflow**