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

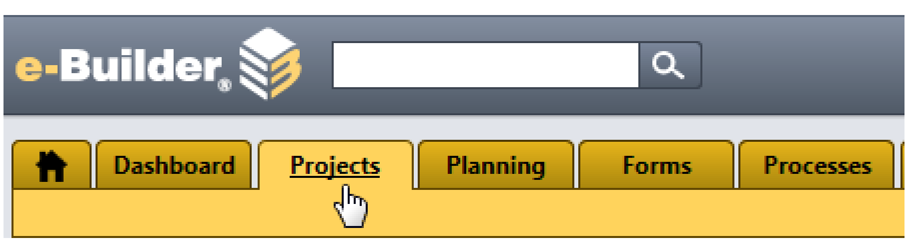
Add a New Project

This task can be completed by:

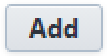
- *Account and Project Administrators*
- *Participants with 'Add Project' Permission*
  - ✓ *Participants with Add Permission would include project managers and project manager support roles.*

To add a new project:

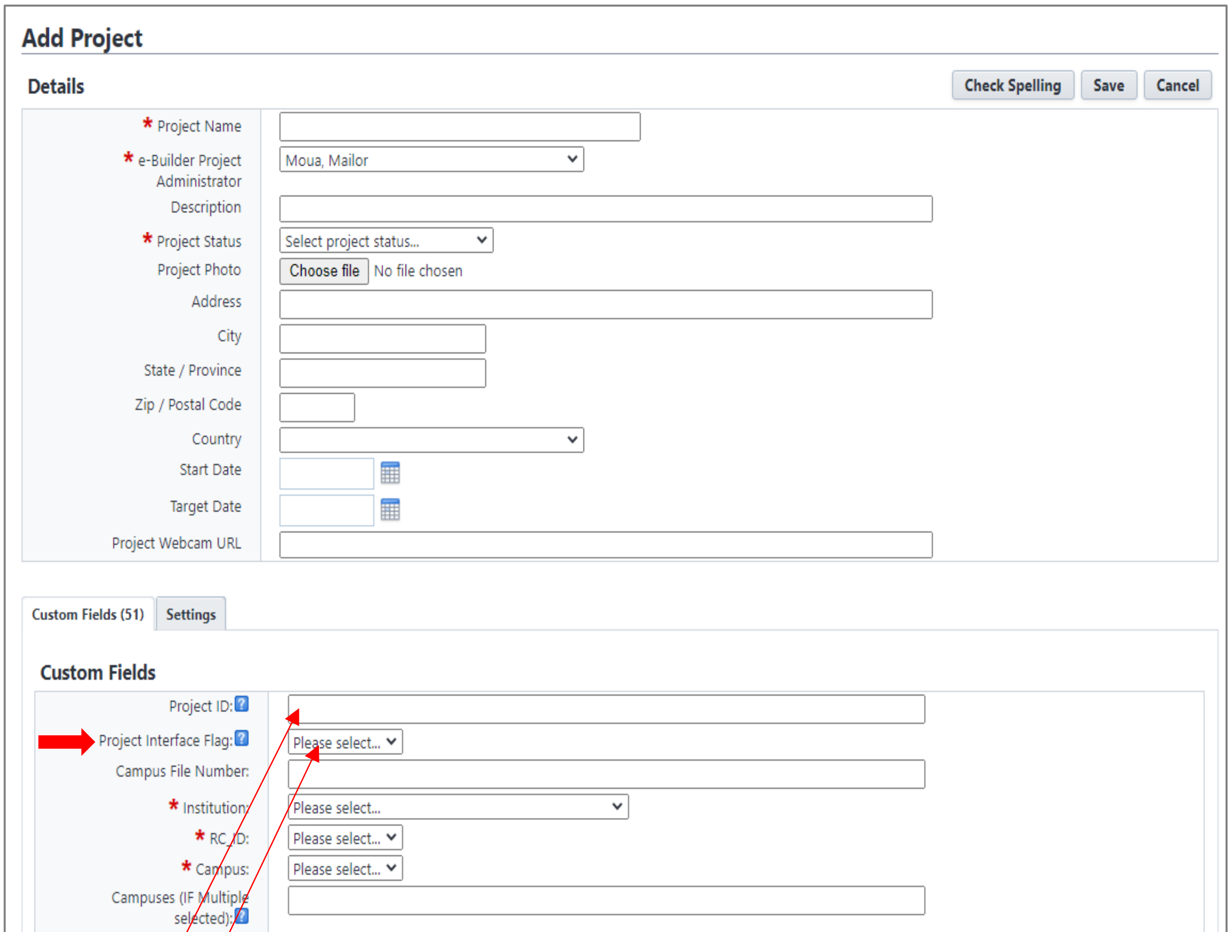
1. Click **Projects** from the Top Navigation tabs.



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



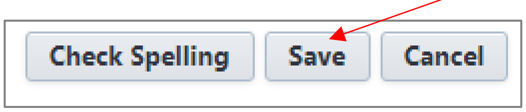
The Add Project page displays.



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**.

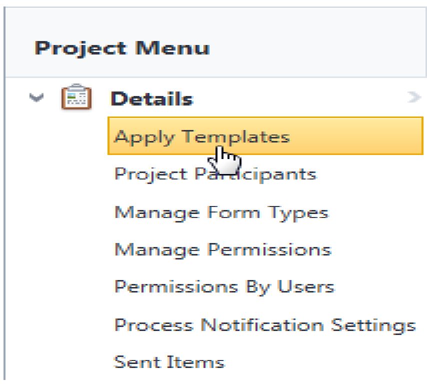


Apply Project Template

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.

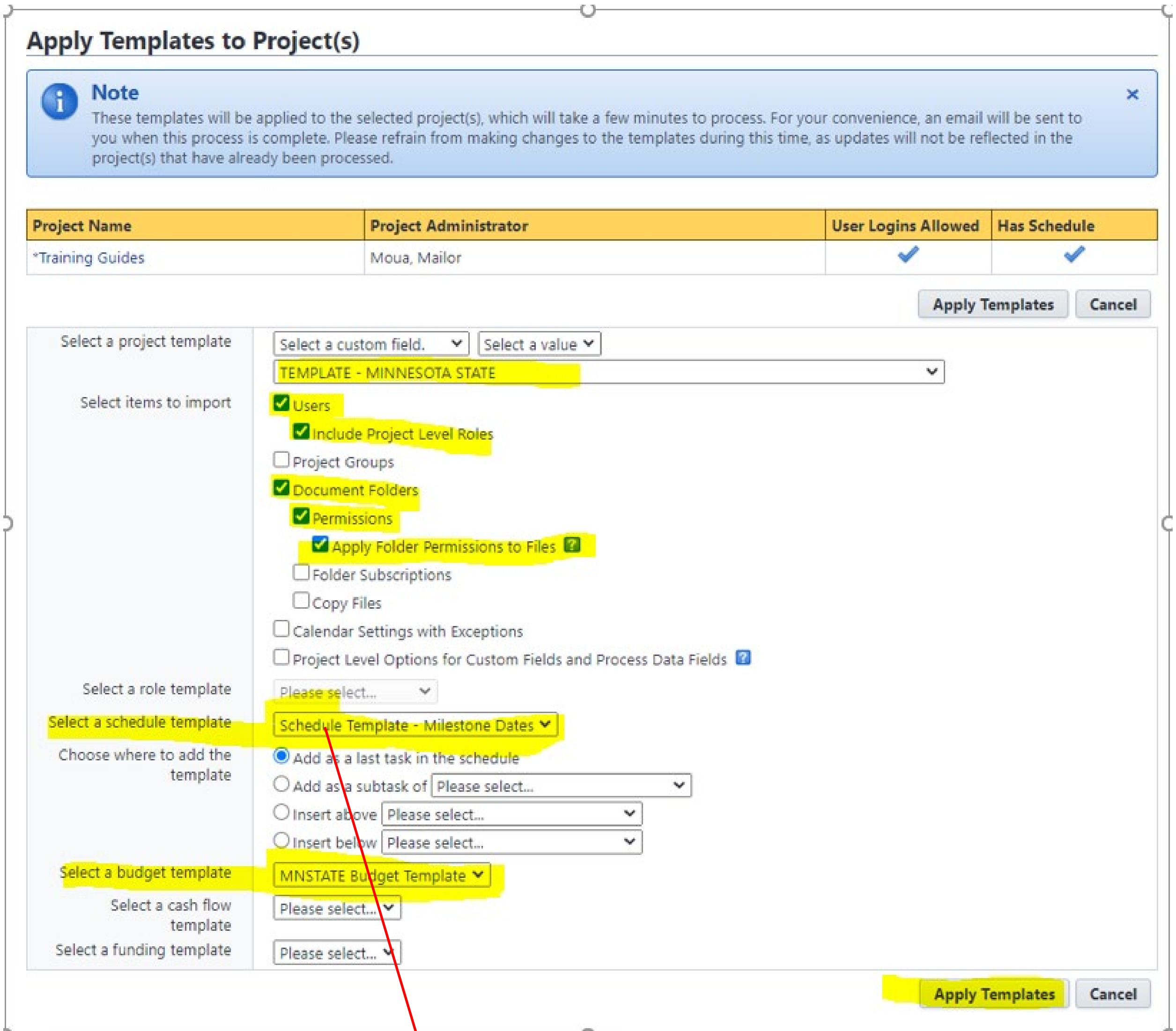
Note*:* These templates will be applied to the selected project(s), which will take a few minutes to process. For your convenience, an email will be sent to you when the process is complete. Please refrain from making changes to the templates during this time as updates will not be reflected in the project(s)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

2. The only fields you need to complete are as follows and illustrated in the screenshots below:

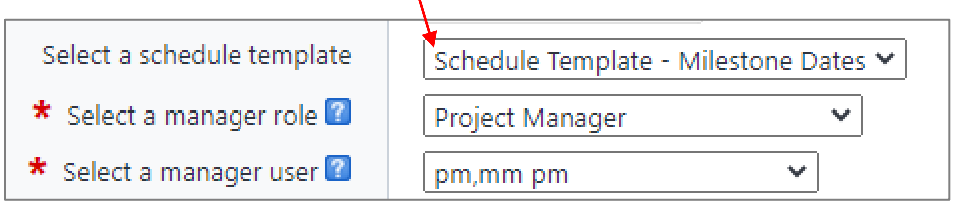
   - **Project template – Select *TEMPLATE-MINNESOTA STATE***
   - **Schedule template -** There are three schedule templates. Select the appropriate template to use for the project.
     1. **Schedule Template – CM at Risk**: select this template for CM at risk project.
     2. Schedule Template – HEAPR: 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.

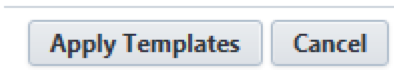
3. Select the high-lighted fields only.



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.



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



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.*

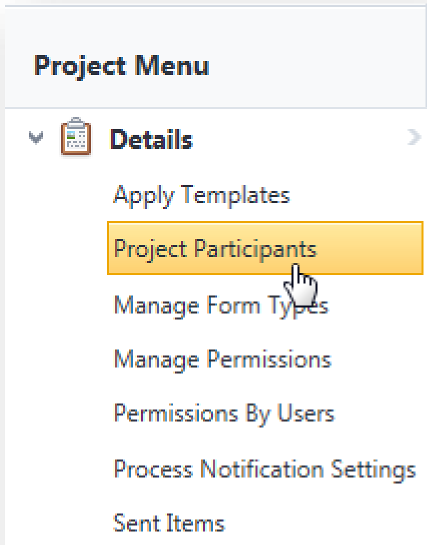
Project membership is necessary for participants to access and work in the project. Participants can be added to a project at any time.

NOTE: The template you apply will have has 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**

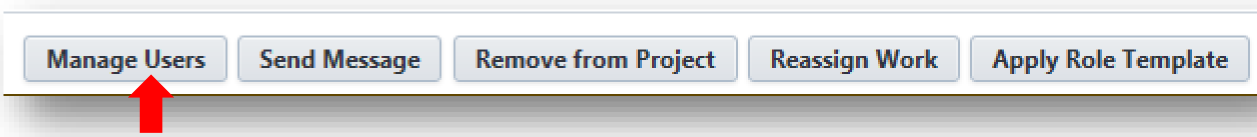
To Add Members:

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



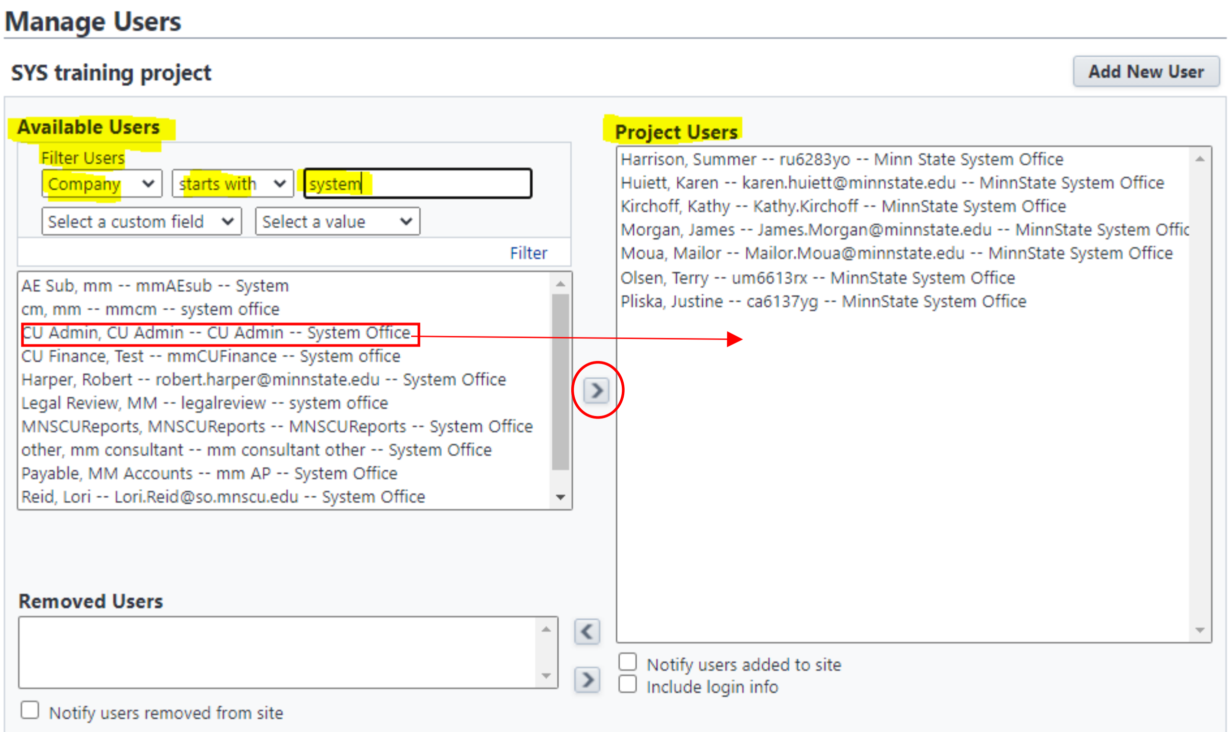
The Project Participants page displays.

2. Click **Manage Users**.

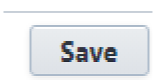


3. From the **Available Users** filter page, search, and select the users to add as Participant(s) to your project. Highlight the name, then click the right directional arrow to add them to the adjacent **Project Users** box.

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

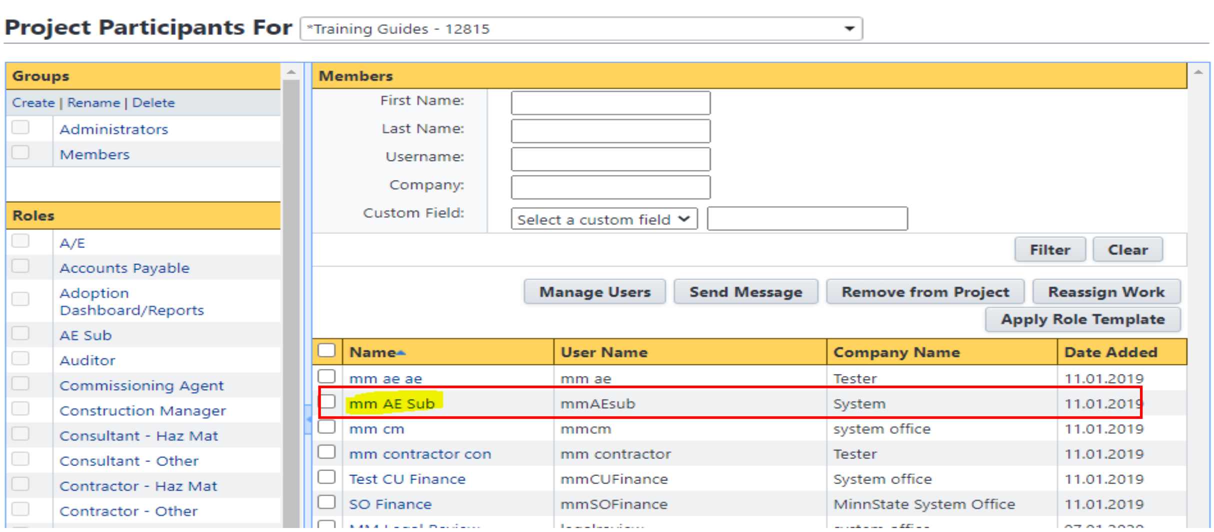


4. Click **Save.**



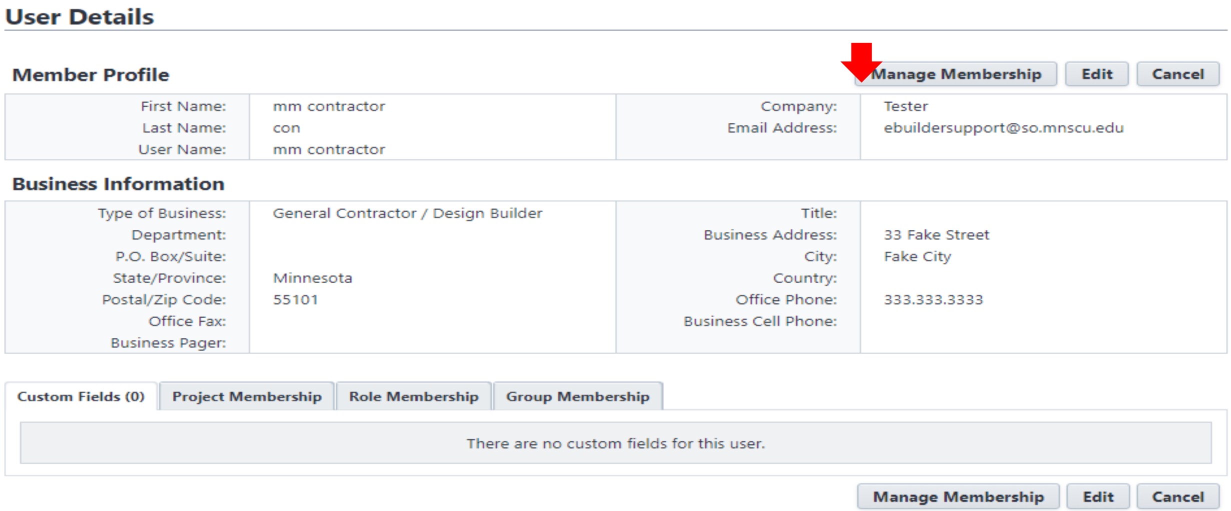
Associate Members to the Project:

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

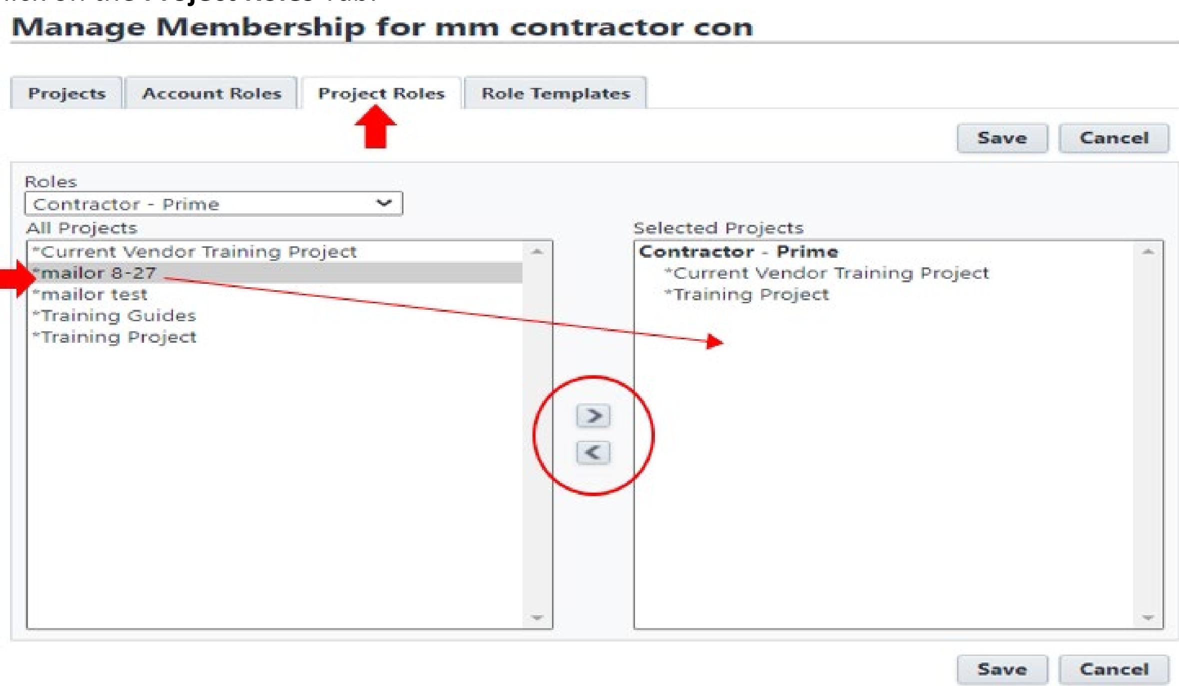


The User Details page will appear.

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



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



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**.

Approve zero (0) budget.

This task can be completed by:

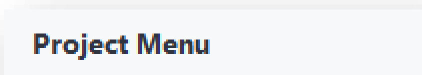
- *Account and Project Administrators*
- *Participants with 'Manager Users' Permission*
  - ✓ *Participants with Manager Users Permissions would include project manager support roles.*

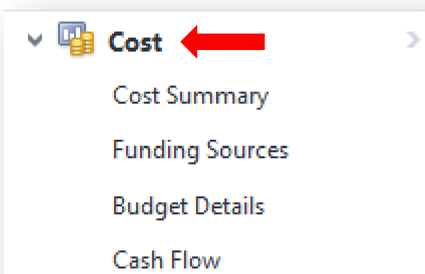
The Budget in e-Builder is the digital form of your budget worksheet information.

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

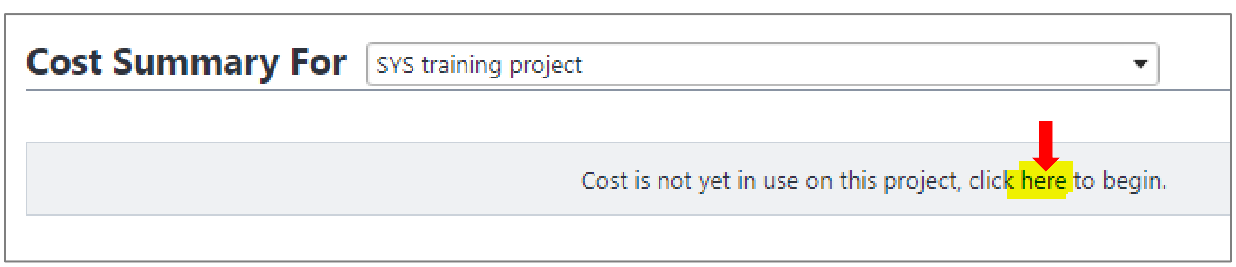
To configure and approve a zero budget worksheet:

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

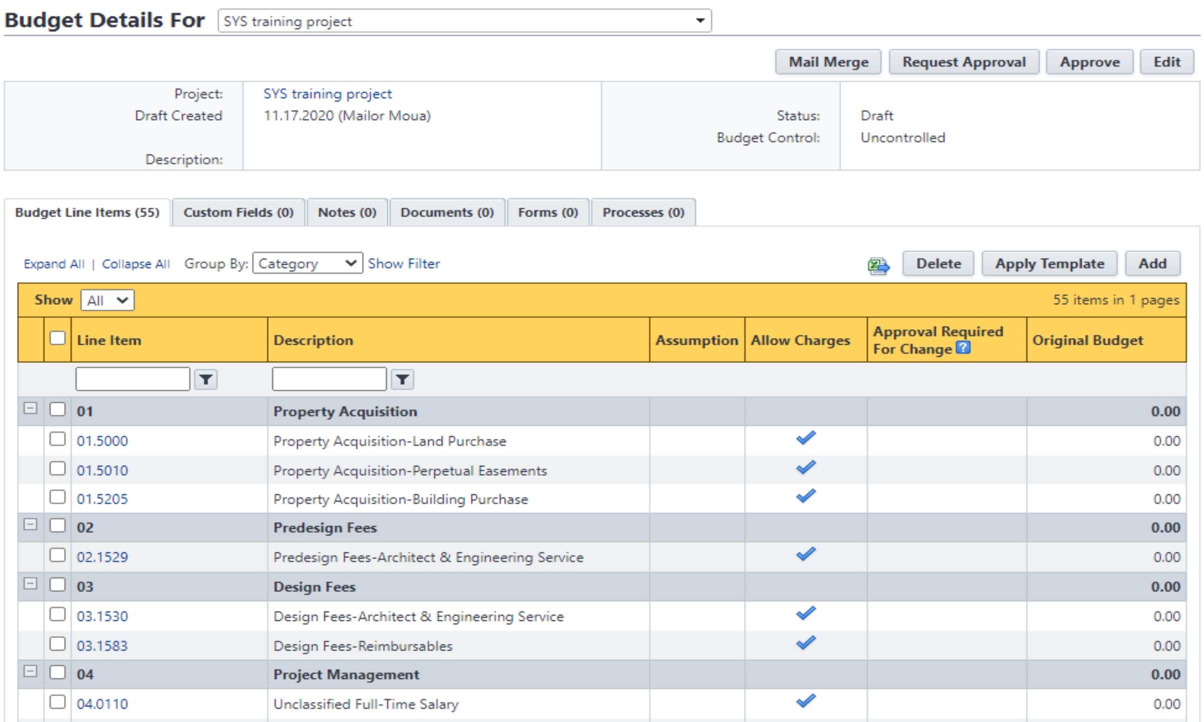




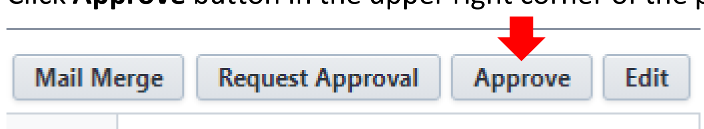
The Cost Summary screen will be displayed.



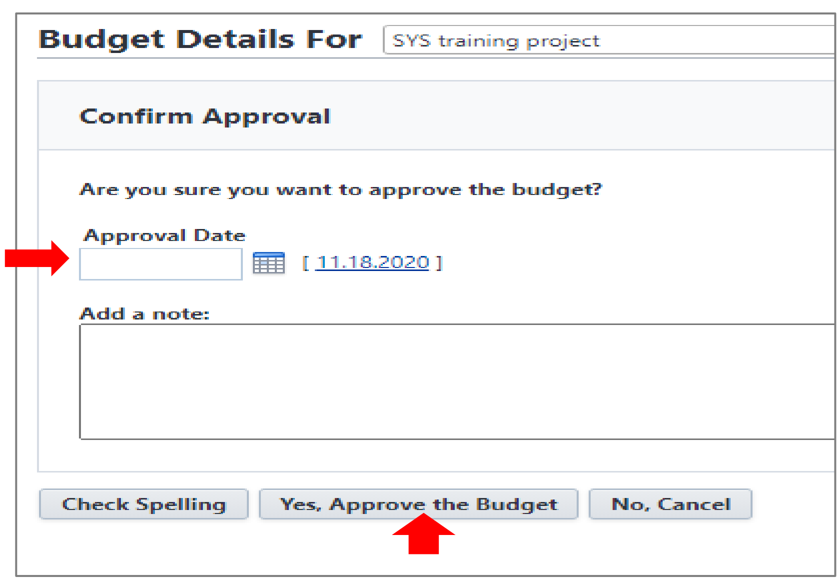
2. Click the word **"here"** in the sentence in the grey area. The Budget Details window appears. All zero Budget Line Items will be visible on the page.



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**.



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.

Page 8 or 9 2/1/2017 ver2.0

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