New Project

Roles: Director, Director Assistant

Required data before start	**Optional data before start**
Project Manager	CDB Number (if necessary)
Project Category	CDB Fiscal Year (if necessary)
Project Status	Start Date
Site (campus)	GSF and NASF
Building	Requestor Information
Project Title	Scope Statement

Step	***Task***
1.	On the Dashboard, select the **Setup New Project** link.
2.	Click the drop-down next to **Project Manager** and select the name of the Project Manager.
3.	Click the drop down next to **Project Category** and select the project category.
4.	Enter the CDB number in the **CDB No.** field, if applicable.
5.	Enter the fiscal year (four digits) for the project's start date in the **CDB Fiscal Year** field.
6.	Click the **Date Selection** icon in the **Start Date** field.
7.	Select a start date; the start date can be modified later.
8.	Select the project's status in the **Project Status** field.
9.	Enter the estimated gross square feet in the **GSF** field.
10.	Click the drop-down next to **Is Research Project;** select either **Yes** or **No**.
11.	Select who will supply insurance for the project in the **Builder's Risk** menu.
12.	Select the appropriate campus site using the **Location** menu.
13.	Enter *New* or *Multiple* or select the **See List** link in the **Building** menu. If the project is a new building, enter the word *New*. If the project will span multiple buildings, enter the word *Multiple*. If the project will take place in an already existing building, click the **See List** link. The Building number field is often required.

Continue…

14.	Select the **Search** link in the *Department* section.
15.	Search for and click the organizational code for the correct department; Window automatically closes and information will be sent to the correct field. This gives campus units the ability to view the project information.
16.	Select the correct **Priority**, **Associated List**, and **Pre Planning Checklist Type** in the *Pre-Planning Details* section.
17.	Select if project will be a Master or Sub-Project using the **Project Grouping** menu.
18.	Type the project name in the **Title of Capital Project** field.
19.	Enter the project's scope statement in the **Scope Statement** field.
20.	Enter information in all fields.
21.	Click the **Continue** command button.
22.	Click the **Confirm** command button to save project; click the **Back** command button to edit.
23.	Click the **Back to My Projects** command button to view list of projects.