## New Project

Roles: Director, Director Assistant

<table>
<thead>
<tr>
<th>Required data before start</th>
<th>Optional data before start</th>
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<tbody>
<tr>
<td>Project Manager</td>
<td>CDB Number (if necessary)</td>
</tr>
<tr>
<td>Project Category</td>
<td>CDB Fiscal Year (if necessary)</td>
</tr>
<tr>
<td>Project Status</td>
<td>Start Date</td>
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<tr>
<td>Site (campus)</td>
<td>GSF and NASF</td>
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<tr>
<td>Building</td>
<td>Requestor Information</td>
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<tr>
<td>Project Title</td>
<td>Scope Statement</td>
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### 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.