



## Create a Project - Process Help

Use these instructions to create a project for a new or existing project.

### Notes:

- You must always use a project template or a copy of an existing project to create a new project.
- Project Organization and Task organization cannot be modified after an expenditure is made (this includes encumbered F & A).
- Project NACUBO cannot be modified once the project has been saved to the Oracle database.

### Prerequisites

- You must have one of the following responsibilities to create a project:
  - ORG Account Establishment Specialist
  - ORG Account Establishment Specialist with Budget Approval
  - ORG Account Establishment Administrator

**To create a project:**

1. Select **Projects** to open the **Find Projects** form.
2. Enter the following fields to narrow your search and find a particular project or project template:  
  
Number, Name, Type, Organization, Status, Category, Class Code, Name, Number or Role to narrow your search.
3. Click **Find** to open the **Project, Templates Summary** form.
4. Click **Copy To** to open the Project Quick Entry form displayed below.

Field Name	Value	Required
Project Name		<input checked="" type="checkbox"/>
Project Start Date		<input checked="" type="checkbox"/>
Project Completion Date		<input checked="" type="checkbox"/>
Project Description		<input checked="" type="checkbox"/>
NACUBO		<input checked="" type="checkbox"/>
Principal Investigator		<input checked="" type="checkbox"/>
Organization		<input checked="" type="checkbox"/>

**Find Projects**

Project Search For: **Projects, Templates**  
 Number: 1148520  
 Name: 15093700C  
 Long Name: 15093700C  
 Type:   
 Organization:   
 Status:   
 Product Source:   
 Source Reference:   
 Classification Category:   
 Class Code:   
 Key Member Name:   
 Number:   
 Role:   
 Customer Name:   
 Number:   
 Relationship:   
 Find

**Projects, Templates Summary**

Operating Unit	Number	Name	Project Type	Description	Status
The Research Foundation f	1148520	15093700C	Standard	Collegiate Scier	Approved

Copy To... Open

5. Enter the following fields:

- Project Name
- Project Start Date
- Project Description
- NACUBO
- Principal Investigator
- Organization Project Status.

Field Name	Value	Required
Project Name	Test Project 1	<input checked="" type="checkbox"/>
Project Start Date	01-MAR-2019	<input checked="" type="checkbox"/>
Project Completion Date	01-MAR-2022	<input checked="" type="checkbox"/>
Project Description	test project for training1	<input checked="" type="checkbox"/>
NACUBO	Training	<input checked="" type="checkbox"/>
Principal Investigator	650 Effort Reporting, Adminis	<input checked="" type="checkbox"/>
Organization	650 CO Training - Human Re	<input checked="" type="checkbox"/>

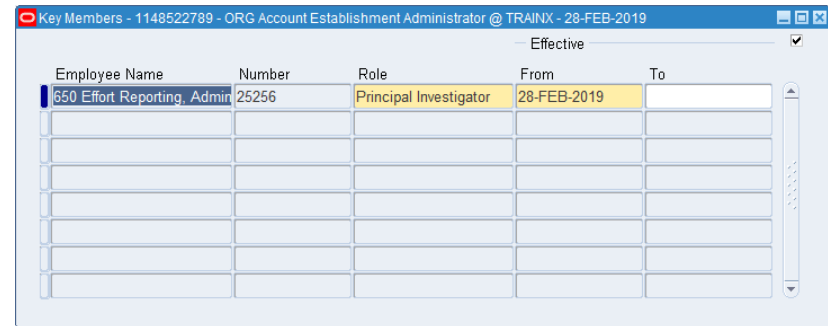
6. Click **OK** to save your changes and return to the **Projects, Templates Summary** form. Click **Open** on the project you just created. Change **Status**, if needed.

Operating Unit	Number	Name	Project Type	Description	Status
The Research Foundation for	1148520	15093700C	Standard	Collegiate Scier	Approved
The Research Foundation for	1148522789	Test Project 1	Standard	test project for t	Approved

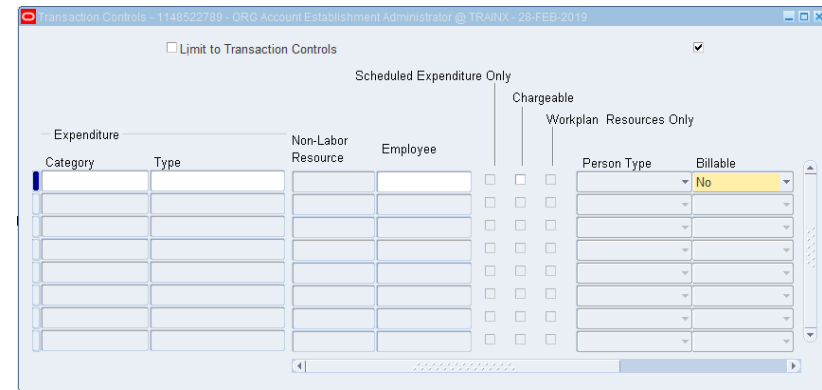
Operating Unit: The Research Foundation for SU  
Number: 1148522789  
Name: Test Project 1  
Type: Standard  
Organization: 650 CO Training - Human Resourc  
Long Name: Test Project 1  
Trans Duration: 01-MAR-2019 - 01-MAR-2022  
Status: Approved  
Description: test project for training1  
Template Dates: 01-MAR-2019 - 01-MAR-2022  
Options: Structures, Tasks, Classifications, Key Members, Transaction Controls, + Billing Information, + Bill Rates and Discount Overrides

7. Make any other necessary changes.

- Under Options, if you need to enter key member information click this line, click **Detail**. The **Key Members form** will automatically open. When finished entering information, save your changes then close the form to return to the Projects, Templates form.



- If you need to establish transaction controls for this project, click **Detail** to open the **Transaction Controls form**.



- Click **File>Save** or click the **Save** icon.