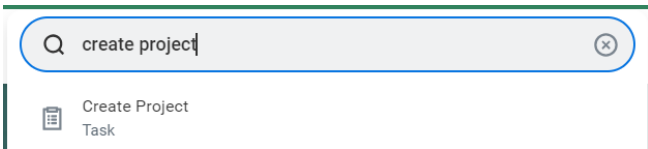


Audience / Role	Project Administrator Project Specialist
Description	This job aid provides instructions to create and edit a project. A project is utilized to capture transactions within a defined timeframe; the project may or may not produce capital assets.

Create Project

1	In the Search bar, enter Create Project. In the search results, select the Create Project task. 
2	Under Create Project, read the instructions and complete the fields for this task. Under Select a Project Hierarchy in the Project Hierarchy field, select the hierarchy to put the project in.
3	Under the Copy from Templates section, select and populate the Project Plan Template field. Select the Project Plan Template that is most relevant to the type of project you are creating. Select OK.
4	For Create Project, under Project Summary, enter the following into the fields: • Project Name – enter the name of the project. • Start Date – select the date the project will start. This date can be edited in the future if needed. • End Date – select the date the project will end. This date can be edited in the future if needed. • Status – select the status from the list. • Owner – defaults to the Project Requestor that is entering the project. • Description – enter a more detailed description of the project. There is no text limit in this field.
5	Under Reference Information, enter the following into the fields: • Project Hierarchy – defaults from the Project Hierarchy field. • Optional Project Hierarchies – • Project ID – leave blank. Workday will generate a unique ID for the project based on a County configured sequence generator. • Include Project ID in Project Name – select this checkbox to enable more efficient searching and identification within the system. • Inactive – Leave blank • Billable – select this checkbox if billable project. Leave blank if not. • Capital – select this checkbox if there is a chance the project will produce capital assets • Company – select Kern County. • Project Currency – defaults to USD. • Customer – only if Project group is billable – select the customer to bill.

	• Balancing Worktag – if Capital checkbox is selected, then enter the fund worktag that WIP should post to. • Project Groups – select project group depending on the project • External Project Reference – Leave blank • Dependencies – leave blank
6	Under the Worktags tab, enter the worktags specific to this project that should default onto transactions. Available worktags are Fund, Cost Center, Activity, Program, Grant. Some worktags are optional and some worktags default depending on other selections. If selections aren't compatible, Workday gives an error message with instructions to fix issue.
7	Under the Project Detail tab, enter additional information about the project in the fields for percent complete, risk level, objective, and project overview. This tab is considered optional.
8	Under the Role Assignment tab, review inherited security role assignments. Most of the project security is inherited from the hierarchy the project is assigned to, but there is the chance for the assignments to be overridden at an individual project basis. If you see changes are needed, and you have authority to update, use the Assign Roles table to populate these fields: • Role – if role is specific to the project, such as project manager, select the role. • Assigned To – identify the person who should have this security role specific to this project. If you see changes are needed, and you do not have the authority to update, add comments toward the bottom of the screen. Note: The Project Manager is the person who will be responsible for approving transactions on the created project. Project Financial Analysts can do financial reporting on the project.
9	Under the Attachments tab, add attachments if necessary. Click Select files>find and click on the file you want to attach>click open>Successfully Uploaded! message displays. To add more than one attachment: Click Upload>find and click on the new file you want to attach>click open>Successfully Uploaded! message displays. To remove an attachment altogether, click the Trash Can icon.
10	Under the Project Plan tab, confirm the Project Plan Template is populated. Templates will default phases and tasks, but values can be customized if needed. Apply any changes to dates or add Custom Task Names. The same Task can be used on multiple rows in conjunction with custom names giving ability to be very flexible on project setup.

11	Under the Resource Plan tab, select between: • Create from Blank – to create a new resource plan. • Copy from Resource Plan Template – to create a resource plan from an existing resource plan. Click Add to create the Resource Plan from blank and fill in the fields.
12	Select Submit.

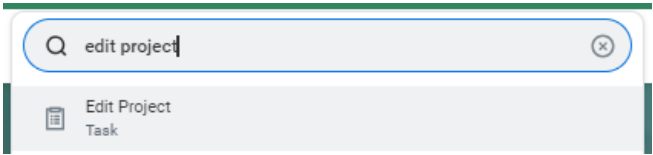
What Happens Next?

- The project routes for review and approval.
- Once approved, a To Do step will be in initiators inbox to create the project's budget.
- After the budget is created and completed, a To Do step will be in initiators Inbox to Create Funding Source Rules, if applicable

Related Reports

- Find Projects
- Extract Projects
- View Project

Edit Project

1	In the Search bar, enter Edit Project. In the search results, select the Edit Project task. 
2	Under Create Project, read the instructions and complete the fields for this task.
3	Under Edit Project, in the Project field, search for and select the project to edit. Select OK.
4	Under Edit Project, update the fields as desired.
5	Select Submit.

What Happens Next?



Projects: Create and Edit Project



- The review and approval. project routes for
- Once approved and if new project status is Substantially Complete for a capital project, a To Do step will be in your inbox to complete asset capitalization.

Related Reports

- Find Projects
- View Projects
- Capital Project Workbench

Related Job Aids

- Capitalize Project Assets