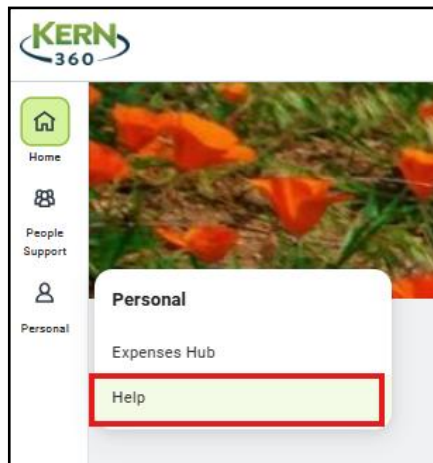
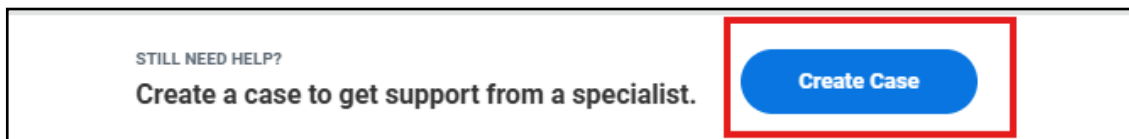


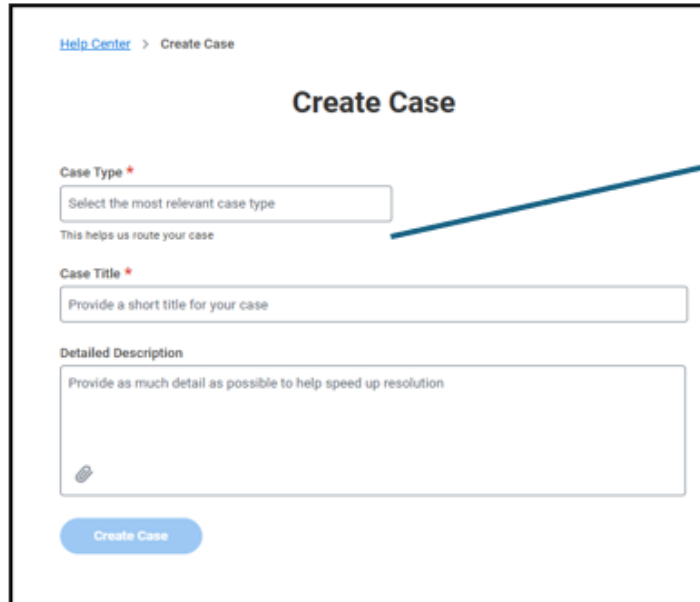
# Projects: Project Creation Instructions for Departments

|                         |                                                                                                                                                                                                                                               |
|-------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Audience / Role</b>  | Project Specialist, Project Hierarchy Manager                                                                                                                                                                                                 |
| <b>Description</b>      | This job aid provides instructions for initiating Project Creation Requests and requisites for Project Creation. A project is utilized to capture transactions within a defined timeframe; the project may or may not produce capital assets. |
| <b>Before you start</b> | Board Approval is received by the Department for their Project creation request which also includes Budget.                                                                                                                                   |

## Create Project

|          |                                                                                                                                                                                                                                                                                                                                                                                                                                          |
|----------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>1</b> | <p>On the Home Page, under <b>Personal</b> Tab, Click on <b>Help</b>. On the Help Center Page, select <b>Create Case</b> Option.</p> <div data-bbox="557 919 987 1379" data-label="Image">  </div> <div data-bbox="272 1459 1395 1596" data-label="Image">  </div> |
| <b>2</b> | Under <b>Create Case</b> , enter the information for the fields on the form as mentioned below:                                                                                                                                                                                                                                                                                                                                          |

# Projects: Project Creation Instructions for Departments



Help Center > Create Case

## Create Case

**Case Type \***

Select the most relevant case type

This helps us route your case

**Case Title \***

Provide a short title for your case

**Detailed Description**

Provide as much detail as possible to help speed up resolution

Create Case



- **Case Type** – Enter “**Projects**”
- **Case Title** - Include “**Project Creation - <CC> - <Type of Project** (Capital Project, Major Maintenance or Fixed Asset)>”
- **Description** – Please include the following Details in the description for the project Creation Request:
  - Name of the Project:
  - Cost Center for the Project:
  - Spend category:
  - Date when the Project Approval was received from the Board:
  - End Date for the Project:
 

Please note: The project Start Date will reflect the date on which Board Approval was received, and if no End Date is specified in the Kern360 ticket, the Fiscal Year end will be used as the project End Date.
  - Specific Assets to be added for the project
  - Specific Phases if any in case of Capital Projects (Optional)
- **“Add required Details” Button:** Enter any additional information and include the attachments additional Information by clicking on this button.
 

**Attachments:**

  - Please include the Attachments for:

# Projects: Project Creation Instructions for Departments

- ✓ Signed Board Letter
- ✓ Board Meeting minutes confirming the approval for the project creation



After all the Details have been entered submit the case to Kern 360 by clicking on **“Create Case”** button.

## What Happens Next?

- A CASE is created in Kern360.
- The ticket is reviewed; if additional information is required, the ticket will be updated to request the necessary details; otherwise, the project is created using the provided information and the ticket is updated with the assigned Project ID.
- The project routes to the Project Hierarchy Manager for review and approval.
- After approval, the project proceeds to Budget Creation and then routes back to both the Project Manager and the Project Hierarchy Manager for final approvals.

## Related Reports

- Find Projects

## Related Job Aids

- Capitalize Project Assets