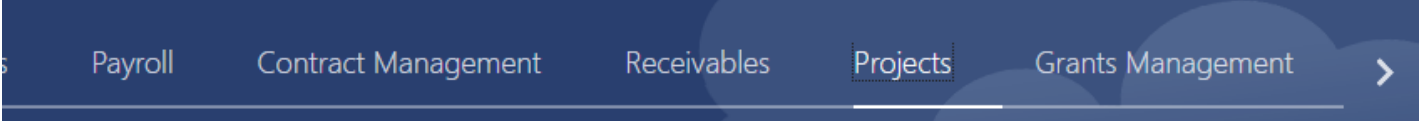

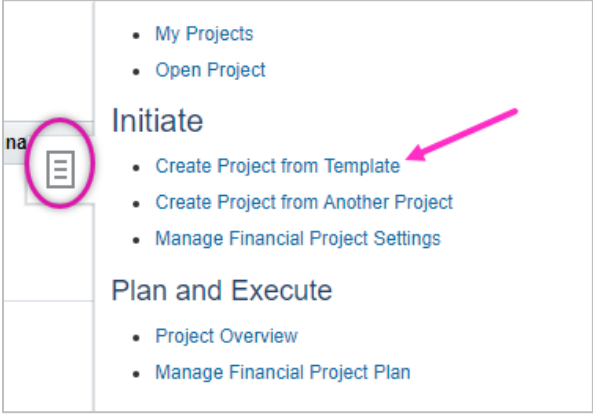


Process Name: Create Capital Project from Template

STEP	DETAIL
1	Sign in to Oracle Cloud through <b>TCNJ Today</b> app bar Click <b>Company Single Sign-On</b> <b>Username:</b> TCNJ login <b>Password:</b> your password Click Home button in upper Right corner
2	Click the <b>Projects</b> from the scroll menu 
3	Click the <b>Project Financial Management</b> infotile 
4	Click <b>Create Project from Template</b> in Task Library 

5

Highlight the template you want to use & click **Create from Template**

Create Project from Template

Search: Project Templates

\*\* Template Name is not blank  
 \*\* Template Number is not blank  
 \*\* Organization is not blank  
 \*\* Business Unit is not blank

Search Results: Project Templates

View

Template Name	Template Number	Business Unit	Project Unit	Organization	Project Type
TCNJ_Faculty_Funds_Project	6	TCNJ	TCNJ_Faculty	Finance & Busin...	TCNJ_Faculty_...
TCNJ_Faculty_Funds_Commitment	7	TCNJ	TCNJ_Faculty	Finance & Busin...	TCNJ_Faculty_...
TCNJ_Federal_Sponsored_Project	2	TCNJ	TCNJ_Grants	Finance & Busin...	TCNJ_Federal_...
TCNJ_Other Sponsored Projects	5	TCNJ	TCNJ_Grants	Finance & Busin...	TCNJ_Other_S...
TCNJ_State_of_NJ_Sponsored_Project	4	TCNJ	TCNJ_Grants	Finance & Busin...	TCNJ_State_of_...
TCNJ_Cost Share Project	3	TCNJ	TCNJ_Grants	Finance & Busin...	TCNJ_Cost Sha...
TCNJ_Capital_Equipment	8	TCNJ	TCNJ_Capital	Campus Planni...	TCNJ_Capital_...
TCNJ_Capital_Project	1	TCNJ	TCNJ_Capital	Campus Planni...	TCNJ_Capital_...

6

Fill in the following fields:

- **\*Project Name** = Input the name of the Project.
- **\*Project Number** = Input the project number
- **\*Project Start Date** = Enter start date.
- **Project End Date** = Enter finish date.
- **\*Project Description** = Enter a description of project
- **\*Project Manager** = Choose project manager

Click **Save and Continue**

Create Project

Project Details

Source Template TCNJ\_Capital\_Project

\* Project Name Capital Project Test-DMM

\* Project Number DMM123

\* Project Start Date 12/06/2019

Project Finish Date mm/dd/yyyy

\* Project Description Test

\* Project Manager Richards, Rhelda

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Change status to **Active**

**Note:** You can add an attachment by clicking Edit in the Attachments section.

Manage Financial Project Settings Capital Project Test-DMM

General Parties Planning Financial Capital Cost Rate Overrides

Basic Information

Project Name: Capital Project Test-DMM  
 Project Number: DMM123  
 Organization: Campus Planning & Construction  
 Description: Test

Start Date: 12/06/2019  
 Finish Date:   
 Project Status: Draft **Change Status**  
 Sponsored Project: No

Hide Detail

Work Type:   
 Business Unit: TCNJ  
 Legal Entity: The College of New Jersey  
 Project Type: TCNJ\_Capital\_Project  
 Source Application:   
 Source Reference:   
 Outline Display Level: 1  
 Priority:   
 Service Type:   
 Original Project Template: TCNJ\_Capital\_Project

Attachments

Type	File Name or URL	Title	Description	Attached By	Attached Date
No data to display.					

8

Add or Edit roles of parties on the project.

Click **Done**

Manage Financial Project Settings Capital Project Test-DMM

General **Parties** Planning Financial Capital Cost Rate Overrides

Team Members

Show  All members  Current members

View + - Detach

Person	E-Mail	Project Role	Start Date	End Date	Security Assignment Status	Track Time
Richards, Rhelda	richards@tcnj.edu	Project Manager	12/06/2019			
Haines, Catelyn	ferrantc@tcnj.edu	Project Accountant	12/06/2019			
Hammar, Tomas	hammart1@tcnj.edu	Project Accountant	12/06/2019			
Van Nostrand, Dana	vannostd@tcnj.edu	Team Member	12/06/2019			
Ricketts, Lloyd	ricketts@tcnj.edu	Team Member	12/06/2019			

## Add Tasks

Click **Manage Financial Plan Project** in Task Library

9

### Initiate

- Create Project from Template
- Create Project from Another Project
- Manage Financial Project Settings

### Plan and Execute

- Project Overview
- Manage Financial Project Plan

### Control

- Manage Project Budget
- Track Financial Project Progress
- Manage Project Forecast

Rename Assets to Task Name (see Appendix for list of tasks)  
 Change Planned Finish Date  
 Use '+' to add a Task, Use 'X' to delete a task

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Manage Financial Project Plan [Capital Project Test-DMM](#)

Display  Hierarchy  List

Tasks Progress Gantt Chart

Actions View + [edit] [delete] [refresh] [print] [detach] Go to Task Number [dropdown] Tasks All tasks [dropdown]

Task Number	Task Name	Resources	* Planned Start Date	* Planned Finish Date	Additional Information	Task	Chargeable	Capitalizable	Raw Cost	
									Planned in Project Currency (USD)	ITD Actual in Project Currency (USD)
▲ DMM123	Capital Project Test-DMM		12/06/2019			Capital Project Test	—	—		
▶ 1PC	Previously Capitalized Costs	+	12/06/2019	12/06/2019		Previously Capitaliz	✓	✓		
▶ 1NC	Non Capitalizable Costs	+	12/06/2019	12/06/2019		Non Capitalizable C	✓	✓		
▶ Asset 1	Asset 1	+	12/06/2019	12/06/2019		Asset 1 (Asset 1)	—	✓		
▶ Asset 2	Asset 2	+	12/06/2019	12/06/2019		Asset 2 (Asset 2)	—	✓		

Rows Selected 1 Columns Hidden 29 Columns Frozen 2

Edit or Delete subtasks  
 Click Additional Information  
 Fill in the following fields:  
**Funding Source** = matches Asset Subtask number  
**Category** = enter 000 for Capital Projects  
                   enter budget category for Non-Capital Proj.

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Manage Financial Project Plan [Capital Project Test-DMM](#)

Display  Hierarchy  List

Tasks Progress Gantt Chart

Actions View + - [Icons] Detach Go to Task Number [Dropdown] Tasks All tasks [Dropdown]

* Task Number	* Task Name	Resources	* Planned Start Date	* Planned Finish Date	Additional Information	Task	Chargeable	Capitalizable	Raw Cost	
									Planned in Project Currency (USD)	ITD Actual in Project Currency (USD)
▲ DMM123	Capital Project Test-DMM		12/06/2019			Capital Project Test- ...	—	—		
▶ 1PC	Previously Capitalized Costs	+	12/06/2019	12/06/2019		Previously Capitaliz ✓	✓	✓		
▶ 1NC	Non Capitalizable Costs	+	12/06/2019	12/06/2019		Non Capitalizable C ✓	✓	✓		
▲ Asset 1	Asset 1	+	12/06/2019	12/06/2019		Asset 1 (Asset 1) —	—	✓		
▶ 1H	134000 - Expended Capital Reserves EduGen	+	12/06/2019	12/06/2019		134000 - Expended ✓	✓	✓		
▶ 1G	134020 - Expended Capital Reserves Housing	+	12/06/2019	12/06/2019		134020 - Expended ✓	✓	✓		
▶ 1F	134040 - Expended Capital Reserve Student Ce	+	12/06/2019	12/06/2019		134040 - Expended ✓	✓	✓		
▶ 1E	134050 - Expended Asset Renewal Reserve Stu	+	12/06/2019	12/06/2019		134050 - Expended ✓	✓	✓		
▶ 1D	134030 - Expended Asset Renewal Reserve Ho	+	12/06/2019	12/06/2019		134030 - Expended ✓	✓	✓		
▶ 1C	134010 - Expended Asset Renewal Reserve Ed	+	12/06/2019	12/06/2019		134010 - Expended ✓	✓	✓		

06/2019 [Dropdown] Previously Capitaliz ✓

**Additional Information** [Close]

Funding Source 134050 [Dropdown]

Category 000 [Dropdown]

OK Cancel

# APPENDIX

## Capital Project Naming Conventions

**Project Numbers will follow PeopleSoft naming conventions (2 alpha characters which represent the building followed by 3 digits)**

The exceptions to this are the school academic equipment projects (XX13x in PeopleSoft) which are now alpha project numbers which identify the school (i.e. School of Science equipment project XX137 is now project number SCIEQ in Cloud)

**Task Number should be the "Asset Type Task Element"\_"Funding Source Task Element"**

*Examples :* Task Number for a Building Improvement funded by the HECIF bond would be BI\_HECIF  
Infrastructure funded by E&G asset renewal would be IN\_AR\_EG

Asset Type	Asset Type Task Element	Funding Source	Funding Source Task Element	Funding Source Number in Additional Information	Category in Additional Information
Building	BL	HECIF Bond/Capital Grant	HECIF	131060	000 - Default (use this for all tasks except for NC)
Building Improvement	BI	HEFT Capital Grant	HEFT	131080	
Land	LAND	2010AB Bond	2010AB	133160	<i>If the task is NC:</i>
Land Improvement	LI	Asset Renewal - E&G	AR_EG	134010	100 - Instruction
Infrastructure	IN	Asset Renewal - Housing	AR_HSG	134030	200 - Research
Leasehold Improvement	LHI	Asset Renewal - Student Center	AR_BSC	134050	300 - Public Service
Academic Equipment	AE	Capital Reserves - E&G	CAP_EG	134000	315 - Academic Support
Furniture	FURN	Capital Reserves - Housing	CAP_HSG	134020	320 - Student Services
Software	SW	Capital Reserves - Student Center	CAP_BSC	134040	325 - Institutional Services
Computer Equipment/Hardware	HW	Operating Reserves - E&G	OP_EG	134015	330 - Operation & Maintenance of Plant
Other Equipment	EQ	Operating Reserves - Housing	OP_HSG	134035	500 - Auxiliary
Non-capitalizable	NC	Operating Reserves - Student Center	OP_BSC	134055	
		Strategic Reserves	STRAT	134016	
		Insurance Funds	INS	136050	
		Other External Funds	OTH	136099	
		College Maintenance Fund	MAINT_EG	137000	
		Housing Maintenance Fund	MAINT_HSG	137010	
		Student Center Maintenance Fund	MAINT_BSC	137020	

## Faculty Fund Project Naming Conventions

**Project Number will be the employee's last name in all caps with a sequential number at the end. There will be 1 project per employee.**

*Examples :* Dana Van Nostrand's faculty fund project would be VANNOSTRAND1. If there was another employee with the last name Van Nostrand that needed a faculty fund project, that employee's project number would be VANNOSTRAND2.

**Task Number will identify the type of faculty funding. If there was a PeopleSoft project number associated with it, the project number will be part of the task number.**

*Examples :* Task Number for an internal mini-grant that was a project in PeopleSoft would be IG\_M1701

A donor-funded award that was a project in PeopleSoft would be DF\_P2037

<b>Funding Type</b>	<b>Funding Type Task Element</b>	<b>Funding Source Number in Additional Information</b>	<b>Category in Additional Information</b>
F&A (PI F&A enterprises)	F&A	102900	100 - Instruction
Internal Grants (mini-grants)	IG	121000	200 - Research
Start Up	SU	102900	300 - Public Service
Donor Funds	DF	121000	315 - Academic Support
SOSA	SOSA	121000	320 - Student Services
MUSE	MUSE	102900	325 - Institutional Services
			330 - Operation & Maintenance of Plant
			500 - Auxiliary