Creating a Project and Activity

Purpose: Use this document to create a Project and Activity in ctcLink.

Audience: Finance/Grant Fiscal Staff.

- You must have at least one of these local college managed security roles:
- ZZ PC Local Configuration
- ZZ Project Costing Processing

You must also set these User Preference Definitions:

• FSCM 9.2 - Grants Security

If you need assistance with the above security roles or User Preference Definitions, please contact your local college supervisor or IT Admin to request role access.

This process is sequential - It is very important to complete these tasks in the order of steps shown below.

Creating a Project

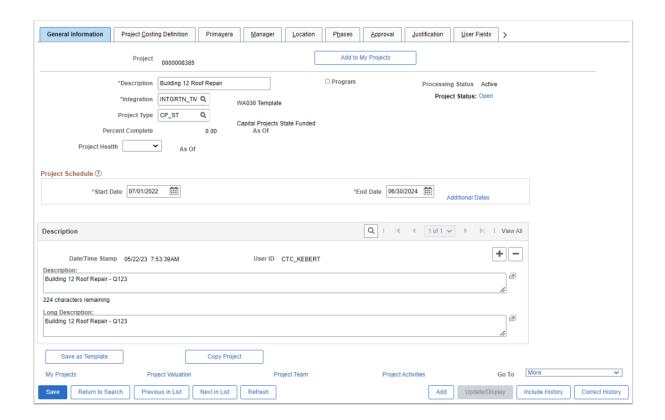
Navigation: Project Costing > Project Definitions > Define Project General Info

- 1. On the **General Information** search page, select the **Add a New Value** tab.
- 2. Enter or look up the **Business Unit.** (The value defaults from your User setup. Can be changed if you have access to multiple business).
- 3. In the **Project** field, accept default value of **NEXT DO NOT CHANGE**; the system will use this value to auto number upon saving new projects.
- 4. Select **Add**. The **General Information** page will display.
- 6. On the **General Information** tab, enter a **Description** for the new project. (Max 30 characters).
- 7. Enter or look up your local college **Integration** template.
- 8. Enter or look up the **Project Type**. (This is the revenue account for the grant. This must be completed for billing to be successful). For Capital Projects, the **Project Type** is CP_LC (Locally Funded) or CP_ST (State Funded).
- 9. In the Project Schedule section, enter or select the;

- a. **Start Date**: **MM/DD/YYYY** for the project. (The start date cannot be after the start date of any activity for the project).
- b. **End Date**: **MM/DD/YYYY** for the project. (The end date cannot be prior to the end date of an activity for the project).
- Optional to enter additional Project scope or information within the **Description** and/or **Long Description** fields.
- 11. Select the **Save** button.

Notice that upon saving this project for the first time:

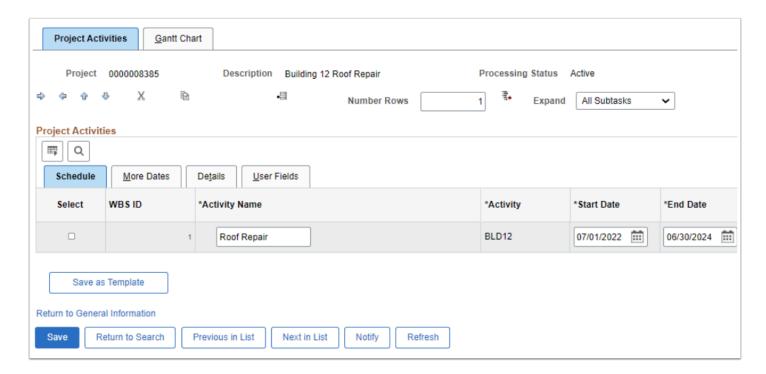
- The system creates a new project and assigns a Project ID.
- The Project Status field becomes read only on this page and appears as a link. The link takes you to the Project Definitions Status page where you can update the Active or Closed statuses.



- Select the Location tab.
- 13. Enter the **start date** of the Project and enter or select a **Location Code** to identify where the project is based.
- 14. Select the User Field tab.
- 15. For Capital Projects, enter the **Capital Project number** that was assigned to you by the State Board in **Field 5**, i.e. Q123.
- 16. Select the **Save** button.

Creating an Activity

- 17. On the General Information page (or **User Field** tab) select the **Project Activities** link at the bottom of the page.
- 18. The **Project Activities** page displays.
- 19. In the **Activity Name** field, enter a name that defines the Project, i.e. Roof Repair.
- 20. In the **Activity** field, enter a meaningful Activity ID field value. Limited to 5 fields, this value defines the Activity ID of your ChartString, i.e. BLD12 or Q123.
- 21. Select the **Save** button.



22. Process complete.

Video Tutorial

The video below demonstrates the process actions described in the steps listed above. There is no audio included with this video. Select the play button to start the video.

Video Tutorial Via Panopto

View the external link to **Creating a Project and Activity.** This link will open in a new tab/ window.



The next step would be **Creating a Project Budget**.