

PROJECTS

HOW TO CREATE A PROJECT

When you are planning to make a capital purchase you will first need to have a project created. The project is a mechanism for tracking capital spending and also ensuring that there is enough funding allocated to the budget. To request for a project to be created for a capital purchase, you will first go to the Brandeis finance website and click on the 'Capital Project Request' form.

How to Complete the Online Project Request Form

1. Enter the **first and last name** of the individual who is submitting the request.
2. Enter the **email address** of the individual who is submitting the request.
3. Enter the **phone extension** of the individual who is submitting the request.
4. Enter the **project name**.
5. Enter a **project description**. This is a free text field to provide some additional information regarding the project or purchase. This detail will not be included in the project name.
6. Enter the **project manager**. This will be the person who will be overseeing the project or purchase and can be contacted for any questions on invoicing, project status, etc.
7. Enter the **phone extension** of the project manager.
8. Enter the **budget amount**. This amount is the total amount of the project.
9. Enter the **fiscal year** in which the project is **budgeted** for. This does not necessarily correlate to the year in which the funds are actually spent as some projects cross fiscal years.
10. Indicate which **fiscal year(s)** the funding on the project is expected to be **spent**. For example, if you are renovating an office and a portion of the project will be spent in one fiscal year and the remaining portion will conclude in another fiscal year we will need to know that break out to the best of your ability.
11. Enter the **cost center** that is funding the project.
12. If the project is being funded by a **gift or discretionary** please include those worktags. If the project will be University funded then this field will be left blank.
13. Supporting **documentation** is required on all project requests to ensure that the accounting treatment can be verified and the amount that will be spent is reasonable. Please attach your supporting documentation directly to the form. If no documentation is included then a member of the accounting team will follow up and request it.
14. Click **Submit**

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CAPITAL PROJECT REQUEST

Name * 1.

First Last

Email * 2.

Campus Phone Extension 3.

Project Name 4.

Project Description 5.

Project Manager 6.

First Last

Project Manager's Campus Phone Extension

Budget Amount 8.

Fiscal Year 9.

Please indicate which fiscal year this project is planning to be spent. If funds will be spent in more than one fiscal year please provide the amount expected to be spent in each year. **10.**

Cost Center

Gift or Discretionary Fund (if applicable)
 12.

Attach Your File
 No file selected. **13.**

 14.

- 15. Your project request will route to a member of the accounting team for review. Once the project has been reviewed and approved, an accounting team member will create the new project in Workday. Once the project has been created, the person who submitted the request along with the project manager will receive notification of the new project worktag. The worktag will also be sent along to a member of the procurement team who will add the new worktag into Coupa so invoices can be purchased against it.