

How to Create an Opportunity Project

1

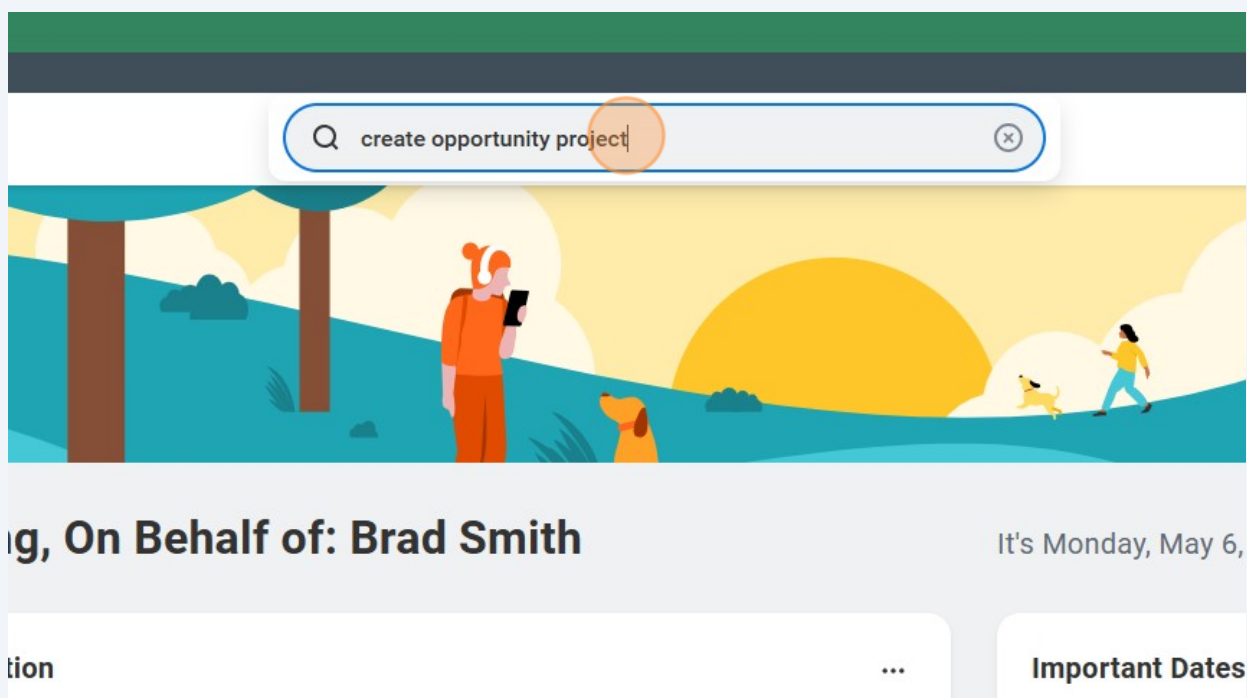
CER in PeopleSoft is now Project in Workday. When creating a new project (CER), it is called an Opportunity Project until it is approved. Approved Opportunity Projects are referred to as Projects. This applies to assets that are "CER - Charge to GSI" ONLY.

2

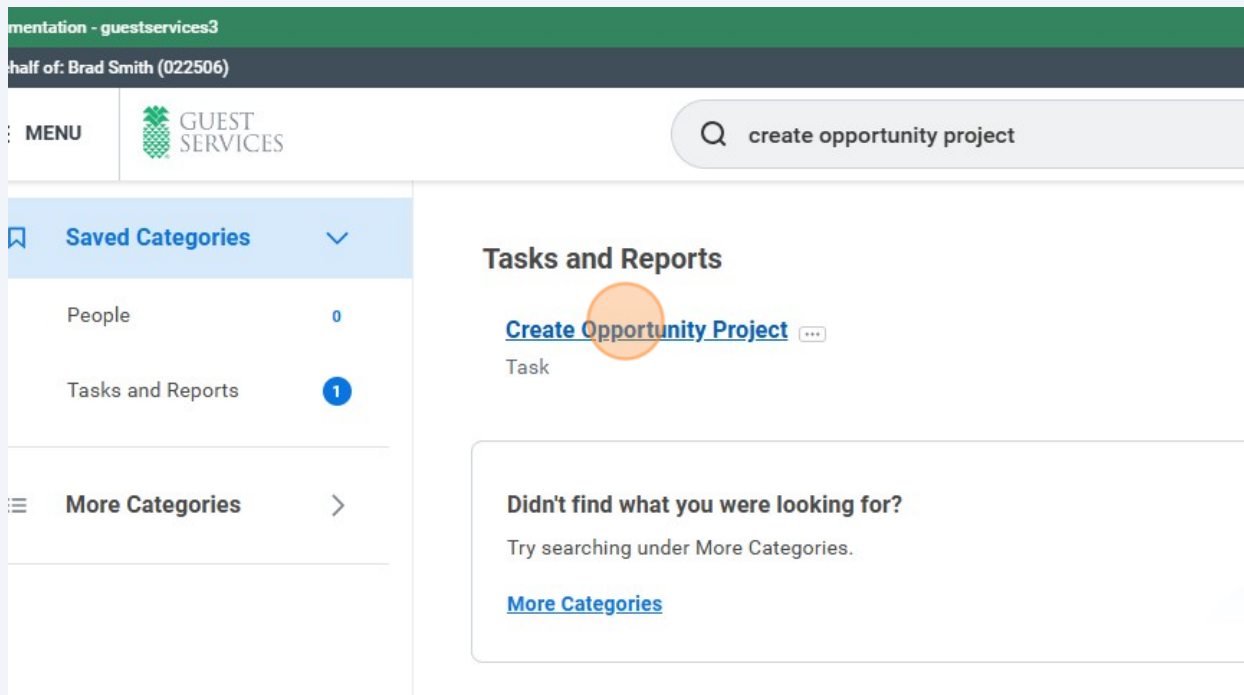
For "CER - Charge to Receivables", please submit your invoices to OSV for payment. For "CER - RMR/CIA/FDA/R&R Funds", please submit your invoices and approvals from NPS to Myrna Mullins for payment.

3

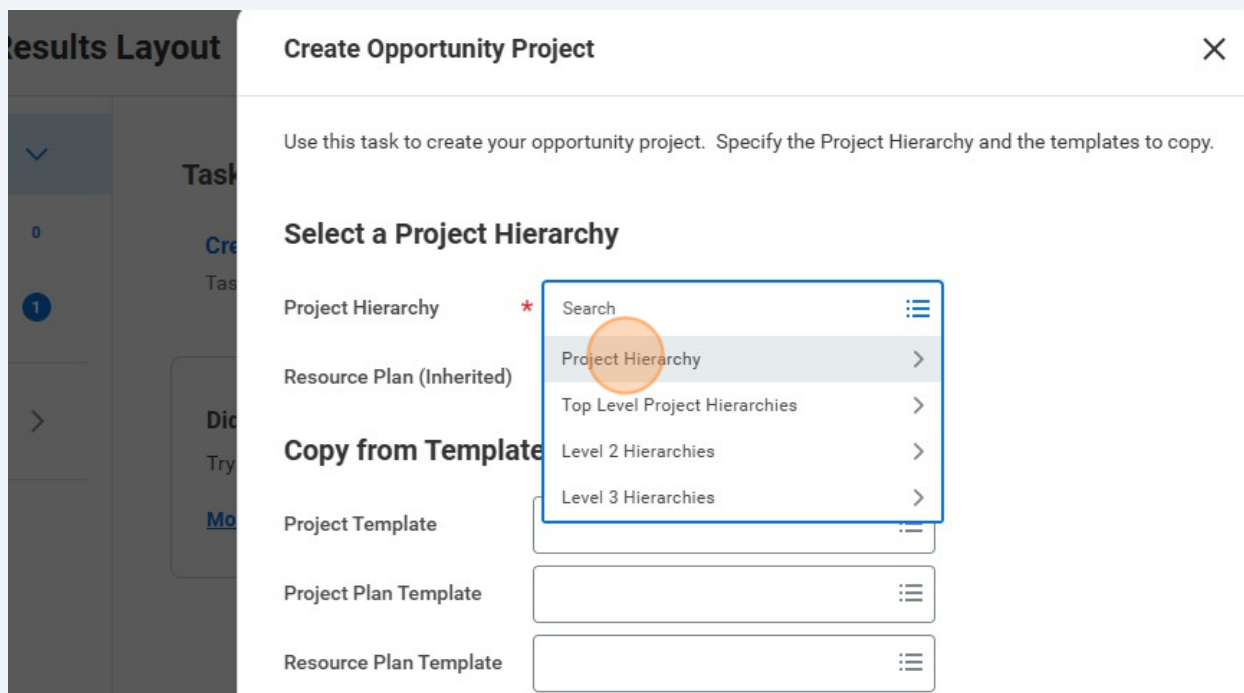
In Search box type "create opportunity project" then hit Enter.



- 4 Click "Create Opportunity Project" under Tasks and Reports.



- 5 In "Project Hierarchy" field select "Project Hierarchy".



6 Select your Cost Center and click Ok.

Project Hierarchy

Resource Plan (Inherited)

Copy from Template

Project Template

Project Plan Template

Resource Plan Template

Task Resource Template

Search

Project Hierarchy

- ☐ CC01928 Blue Spring Rentals
- ☐ CC01929 Hontoon Island
- ☐ CC01930 Weeki Wachee Administrative
- ☐ CC01931 Weeki Wachee Mermaid Galley
- ☒ CC01932 Weeki Wachee Captains Quarters
- ☐ CC01933 Weeki Wachee Pirates Grub
- ☐ CC01934 Weeki Wachee Snack Shack
- ☐ CC01935 Weeki Wachee Tiki Bar
- ☐ CC01936 Weeki Wachee Gift Locker
- ☐ CC01938 Weeki Wachee Rental Tubes & Lockers
- ☐ CC01939 Weeki Wachee Gifts Above

Cancel OK

7 In "Project Name" field, enter project name in the following format: project name_cost center number_today's date. For example: "Beverage Merchandiser_1932_05062024".

2. Check the 'Capital' Checkbox.
3. Company
4. Optional Balancing Worktags (Should be the Unit Cost Center for which the Opportunity Project is being created)
5. In the Worktags section, select the same Unit Cost Center that was selected in the Optional Balancing Worktags field)
6. In addition to the above, attach 3 Bids

Project Summary

Project Name *

Start Date * 05/06/2024

End Date MM/DD/YYYY

Status

Probability 0

Reference

Project Hierarchy

Optional Project

Project ID

Include Project

Inactive

Billable

- 8 In "Start Date" field, enter today's date. For "Status" field select "Proposed".

Project Summary

Project Name *

Beverage Merchandiser_1932_05062024

Start Date *

05/06/2024

End Date

MM/DD/YYYY

Status

Probability

0

Owner

×

Brad Smith

Description

Reference

Project Hierarchy

Optional Project

Project ID

Include Project

Inactive

Billable

Capital

Company

Project Currency

Customer

- 9 In "Description" field, give a detailed description.

Start Date *

05/06/2024

End Date

MM/DD/YYYY

Status

×

Proposed

Probability

0

Owner

×

Brad Smith

Description

Beverage Merchandiser for juices

Reference

Project ID

Include Project

Inactive

Billable

Capital

Company

Project Currency

Customer

Optional Balance

Project Groups

10

For "Reference Information" section (on right-hand side of screen), check the "Capital" box.

Optional Project Hierarchies	<input type="text"/>
Project ID	<input type="text"/>
Include Project ID in Name	<input type="checkbox"/>
Inactive	<input type="checkbox"/>
Billable	<input type="checkbox"/>
Capital	<input checked="" type="checkbox"/>
Company	<input type="text"/>
Project Currency	<input type="text" value="x USD"/>
Customer	<input type="text"/>
Optional Balancing Worktags	(empty)
Project Groups	<input type="text"/>

11

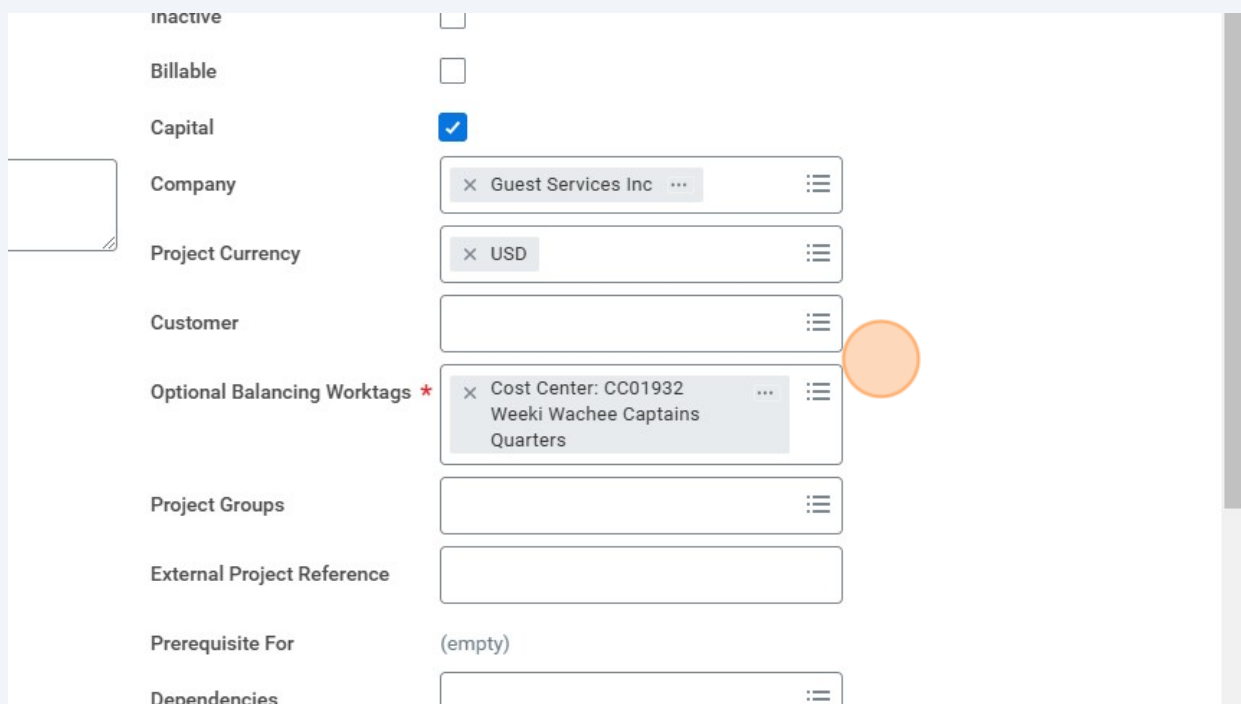
In the "Company" field, select Guest Services, Inc.

Optional Project Hierarchies	<input type="text"/>
Project ID	<input type="text"/>
Include Project ID in Name	<input type="checkbox"/>
Inactive	<input type="checkbox"/>
Billable	<input type="checkbox"/>
Capital	<input checked="" type="checkbox"/>
Company	<div> <input checked="" type="radio"/> Guest Services Inc ... </div> <div> <input type="text" value="Search"/> </div>
Project Currency	<input type="text" value="x USD"/>
Customer	<input type="text"/>
Optional Balancing Worktags	<input type="text"/>

Error: Enter a company for the capital project.

Error:
Enter a project currency that matches the company currency for the capital project.

12 In the "Optional Balancing Worktags" field, select your cost center.



inactive ☐

Billable ☐

Capital ☒

Company

Project Currency

Customer

Optional Balancing Worktags *

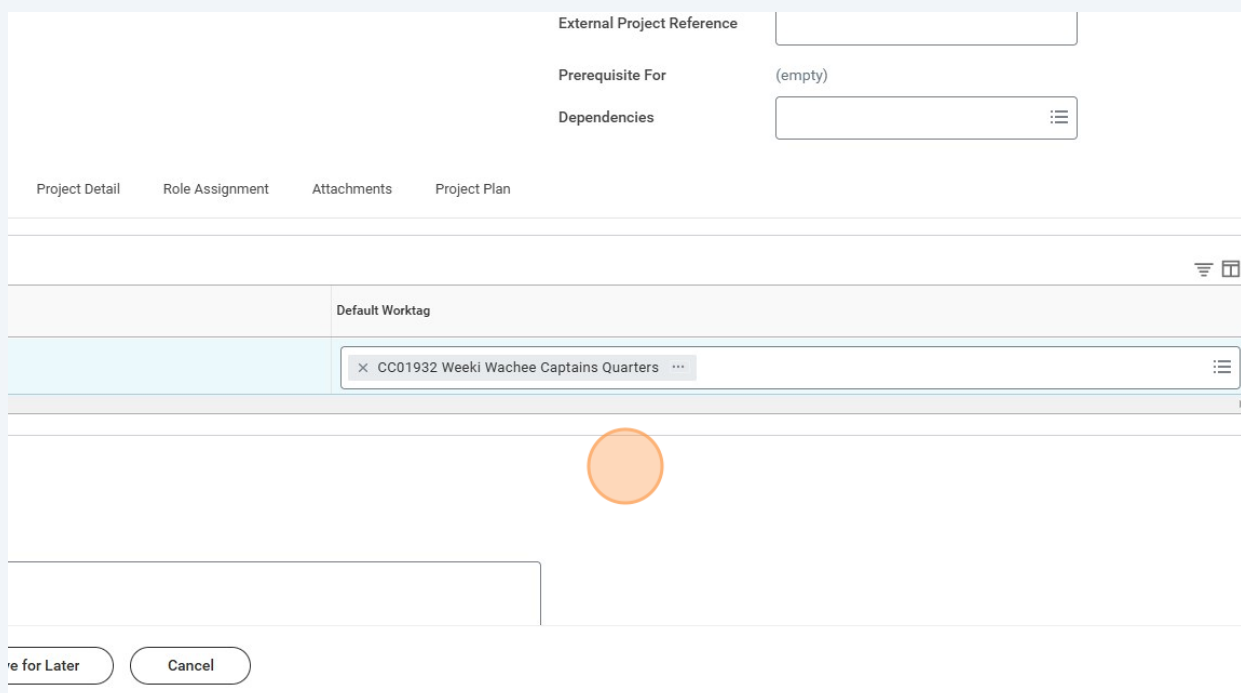
Project Groups

External Project Reference

Prerequisite For (empty)

Dependencies

13 Scroll down to "Worktags" tab, to complete the "Default Worktag" field by selecting the "Active Cost Center" then "Cost Center".



External Project Reference

Prerequisite For (empty)

Dependencies

Project Detail Role Assignment Attachments Project Plan

Default Worktag

Save for Later Cancel

- 14 For "Attachments" tab, please include 3 quotes, if not a preferred vendor.

Project Groups

External Project Reference

Prerequisite For (empty)

Dependencies

Worktag Types 1 item

Worktag Type	Default Worktag
Cost Center	<input type="text" value="x CC01932 Weeki Wachee Captains Quarters ..."/>

- 15 Click "Select files".

Role Assignment **Attachments** Project Plan

Drop files here


or

Select files

Cancel

16 Click "Submit"


Attachments

 Workday Attachment.docx
✓ Successfully Uploaded!

Comment


enter your comment

17 Click on "To Do" to complete the remaining opportunity project information.

Categories 

0

d Reports **1**

Categories 

Tasks and R

Create Project: Beverage
Merchandiser_1932_05062024 [O] on...
Up Next: Brad Smith | Enter Capital Expenditure Request details
| Due Date 05/08/2024
[View Details](#)

Didn't find w
Try searching

[More Categories](#)

To Do

18 STOP. Please read green instructions shown below. Then click "View Project"

Due Date 05/08/2024

Instructions

1. Click on the 'View Project' button displayed in the Inbox notification
2. Enter the name of the Project that was created in the previous step.
3. Use the 'Additional Data' tab on the Project to record CER details.
4. After the CER details have been entered on the Project, go back to your Inbox. Click the 'Submit' button on the

Note: This form is ONLY for CERs Charge to GSI

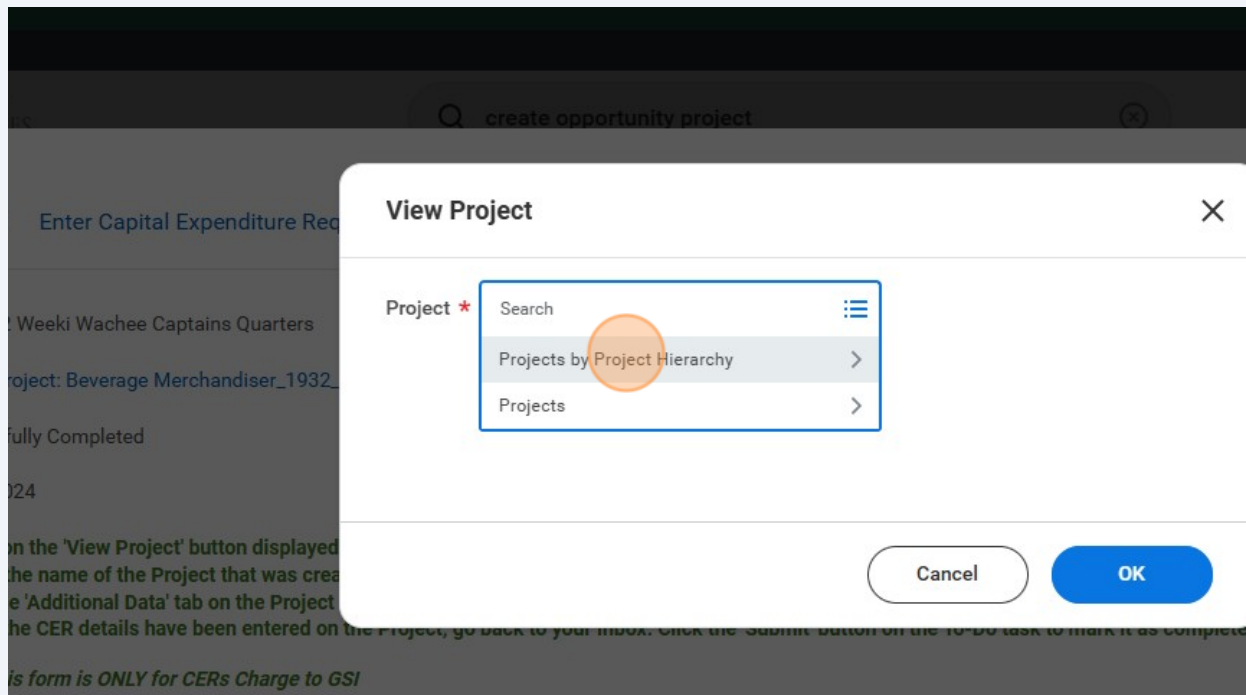
View Project

enter your comment

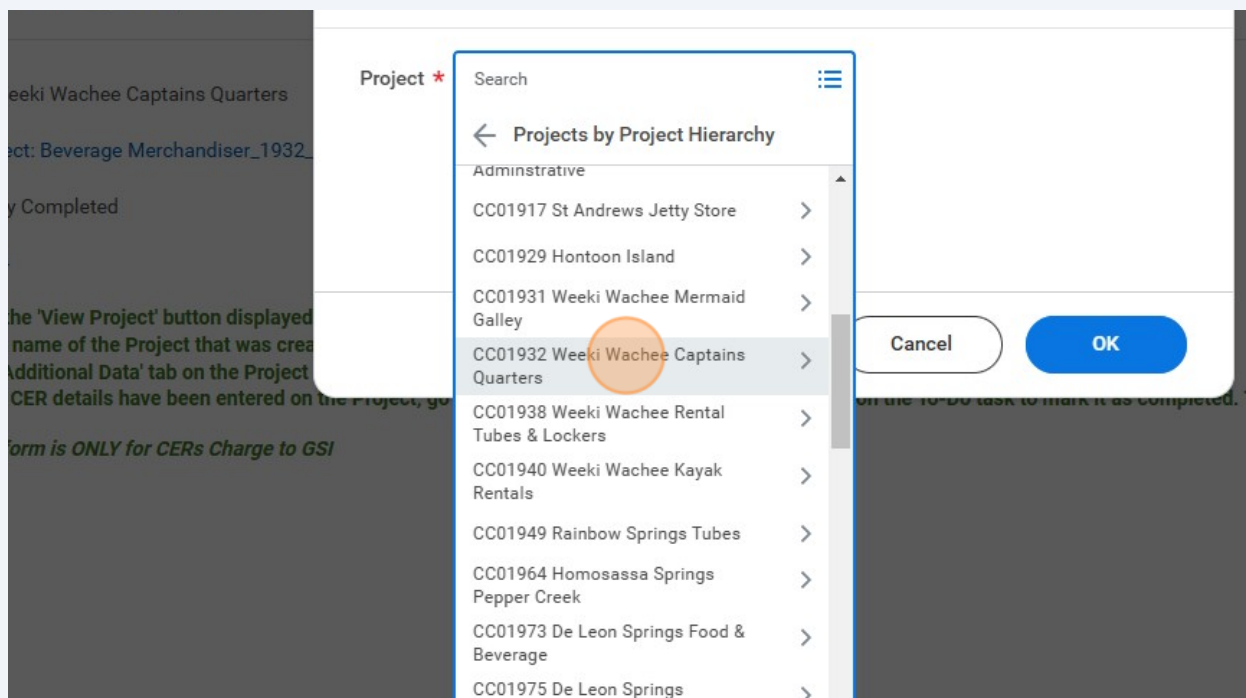


19 Click the "Project" field.

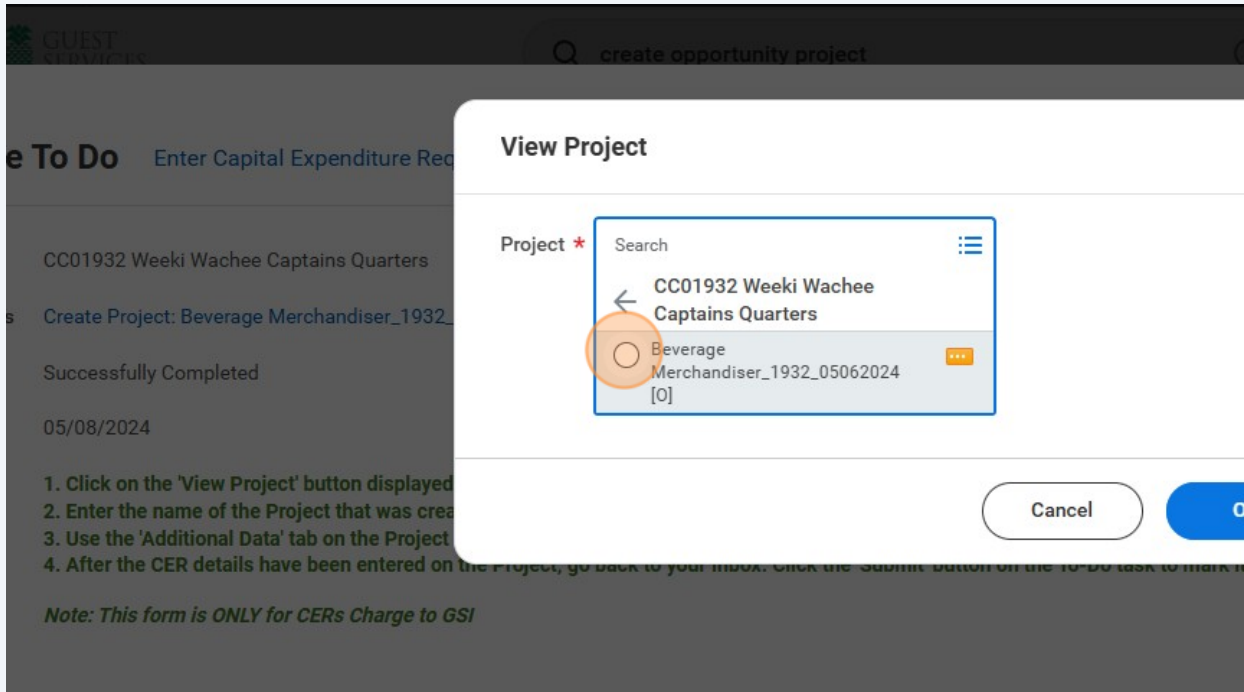
20 Select "Projects by Project Hierarchy".



21 Select your Cost Center.



22 Select your Project.



View Project

Project * Search

- ← CC01932 Weeki Wachee Captains Quarters
- Beverage Merchandiser_1932_05062024 [0]

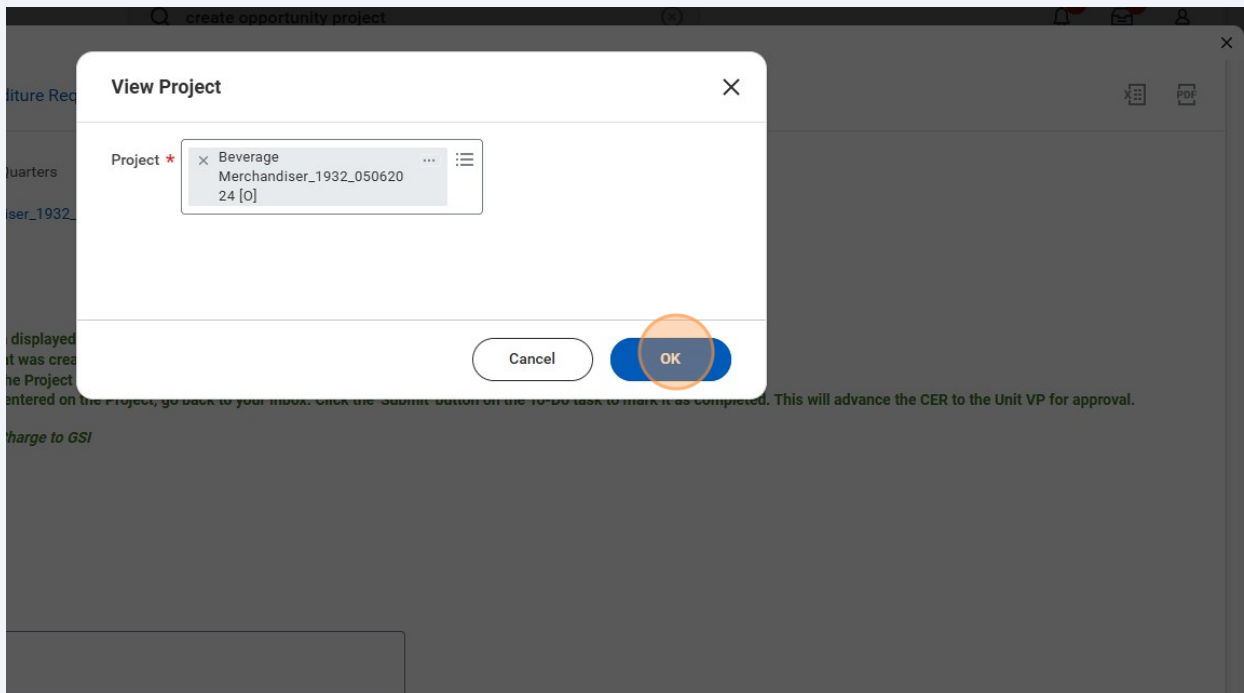
Cancel OK

Task List:

- 1. Click on the 'View Project' button displayed
- 2. Enter the name of the Project that was created
- 3. Use the 'Additional Data' tab on the Project
- 4. After the CER details have been entered on the Project, go back to your inbox. Click the 'Submit' button on the 'To Do' task to mark it as completed.

Note: This form is ONLY for CERs Charge to GSI

23 Click "OK"



View Project

Project * x Beverage Merchandiser_1932_05062024 [0]

Cancel OK

Task List:

- 1. Click on the 'View Project' button displayed
- 2. Enter the name of the Project that was created
- 3. Use the 'Additional Data' tab on the Project
- 4. After the CER details have been entered on the Project, go back to your inbox. Click the 'Submit' button on the 'To Do' task to mark it as completed. This will advance the CER to the Unit VP for approval.

Charge to GSI

24

Under "Reference Information" you will see Project ID (P-XXXXXX). Note this number for future reference. before you click "Additional Data".

Beverage Merchandiser_1932_05062024 [0] ... 101

Owner [Brad Smith \(022506\)](#) Start Date 05/06/2024

Percent Complete 0% End Date (empty)

Status Proposed

Overview Financials

Summary Details Role Assignment **Additional Data** Process History Attachments

[Edit](#) [Apply Project Templates](#)

Project Summary

Project Name Beverage Merchandiser_1932_05062024

Start Date 05/06/2024

End Date (empty)

Status Proposed

Reference Information

Project Hierarchy CC01932 Weeki Wachee Cap

Optional Project Hierarchies (empty)

Project ID P-100056

Include Project ID in Name No

25

Click "Edit".

Names of three Companies and Amounts of Bids for this Request - For Kitchen Equipment quotes, contact TriMark at sacustomerservice@trimarkusa.com, include shipping address. No Other Quotes Necessary (empty)

Selected Vendor (empty)

Other Bid 1 (empty)

Other Bid 2 (empty)

Reason for not selecting low bid (empty)

Amount in Capital Budget 0

[Edit](#)

Activity (1)

26 Type in your name in the "Requested By" field.

The screenshot shows a web application window titled 'Implementation - guestservices3'. The user is logged in as 'Brad Smith (022506)'. The page is titled 'Edit Additional Data' for the 'Beverage Merchandiser_1932_05062024 [0]' project. The form is for a 'Capital Expenditure Request'. The 'Requested By' field is highlighted with an orange circle. The form includes fields for 'Short Description', 'Amount Requested' (set to 0), 'Expenditure Classification', 'Mandatory for National Park Services Contracts Only', 'Complete Description, Expected Benefits & Consequences If Disapproved', 'Names of three Companies and Amounts of Bids for this Request - For Kitchen Equipment quotes, contact TriMark at sacustomerservice@trimarkusa.com, include shipping address. No Other Quotes Necessary', and 'Selected Vendor'. The form has 'OK' and 'Cancel' buttons at the bottom.

Implementation - guestservices3
On behalf of: Brad Smith (022506)

MENU GUEST SERVICES create opportunity project

Edit Additional Data Beverage Merchandiser_1932_05062024 [0]

Custom Object Capital Expenditure Request

Instructions

Capital Expenditure Request for Charge to GSI ONLY

Capital Expenditure Request

Requested By

Short Description

Amount Requested 0

Expenditure Classification

Mandatory for National Park Services Contracts Only

Complete Description, Expected Benefits & Consequences If Disapproved

Names of three Companies and Amounts of Bids for this Request - For Kitchen Equipment quotes, contact TriMark at sacustomerservice@trimarkusa.com, include shipping address. No Other Quotes Necessary

Selected Vendor

OK Cancel

27 Enter the "Short Description" field.

The screenshot shows the same web application window as before, but now the 'Requested By' field contains the text 'Matt Smith'. The 'Short Description' field is highlighted with an orange circle. The form includes fields for 'Short Description', 'Amount Requested' (set to 0), 'Expenditure Classification', 'Mandatory for National Park Services Contracts Only', 'Complete Description, Expected Benefits & Consequences If Disapproved', 'Names of three Companies and Amounts of Bids for this Request - For Kitchen Equipment quotes, contact TriMark at sacustomerservice@trimarkusa.com, include shipping address. No Other Quotes Necessary', and 'Selected Vendor'. The form has 'OK' and 'Cancel' buttons at the bottom.

Implementation - guestservices3
On behalf of: Brad Smith (022506)

MENU GUEST SERVICES create opportunity project

Edit Additional Data Beverage Merchandiser_1932_05062024 [0]

Custom Object Capital Expenditure Request

Instructions

Capital Expenditure Request for Charge to GSI ONLY

Capital Expenditure Request

Requested By Matt Smith

Short Description

Amount Requested 0

Expenditure Classification

Mandatory for National Park Services Contracts Only

Complete Description, Expected Benefits & Consequences If Disapproved

Names of three Companies and Amounts of Bids for this Request - For Kitchen Equipment quotes, contact TriMark at sacustomerservice@trimarkusa.com, include shipping address. No Other Quotes Necessary

Selected Vendor

OK Cancel

28 Enter "Amount Requested" field.

Implementation - guestservices3
On behalf of: Brad Smith (022506)

MENU GUEST SERVICES create opportunity project

Edit Additional Data Beverage Merchandiser_1932_05062024 [0]

Custom Object Capital Expenditure Request

Instructions

Capital Expenditure Request for Charge to GSI ONLY

Capital Expenditure Request

Requested By	Matt Smith
Short Description	Beverage merchandise for juices
Amount Requested	q
Expenditure Classification	
Mandatory for National Park Services Contracts Only	
Complete Description, Expected Benefits & Consequences If Disapproved	
Names of three Companies and Amounts of Bids for this Request - For Kitchen Equipment quotes, contact TriMark at sacustomerservice@trimarkusa.com, include shipping address. No Other Quotes Necessary	
Selected Vendor	

OK Cancel

29 Select the appropriate "Expenditure Classification" field.

Implementation - guestservices3
On behalf of: Brad Smith (022506)

MENU GUEST SERVICES create opportunity project

Edit Additional Data

Beverage Merchandiser_1932_05062024 [0]

Custom Object Capital Expenditure Request

Instructions

Capital Expenditure Request for Charge to GSI ONLY

Capital Expenditure Request

Requested By: Matt Smith

Short Description: Beverage merchandise for juices

Amount Requested: [Field]

Expenditure Classification: [Dropdown Menu]

Mandatory for National Park Services Contracts Only: [Field]

Complete Description, Expected Benefits & Consequences If Disapproved: [Field]

Names of three Companies and Amounts of Bids for this Request - For Kitchen Equipment quotes, contact TriMark at sacustomerservice@trimarkusa.com, include shipping address. No Other Quotes Necessary: [Field]

Selected Vendor: [Field]

OK Cancel

30 If your location has a NPS contract, please complete the next field.

31

Enter the "Complete Description, Expected Benefits & Consequences If Disapproved" field.

Capital Expenditure Request for Charge to GSI ONLY

Capital Expenditure Request

Requested By: Matt Smith

Short Description: Beverage merchandise for juices

Amount Requested: 22000

Expenditure Classification: × New Asset

Mandatory for National Park Services Contracts Only: ⋮

Complete Description, Expected Benefits & Consequences If Disapproved: ⋮

Names of three Companies and Amounts of Bids for this Request - For Kitchen Equipment quotes, contact TriMark at sacustomerservice@trimarkusa.com, include shipping address. No Other Quotes Necessary

Selected Vendor: ⋮

Other Bid 1: ⋮

Other Bid 2: ⋮

Reason for not selecting low bid: ⋮

OK Cancel

32

Complete the "Names of three Companies and Amounts of Bids for this Request...".

Capital Expenditure Request for Charge to GSI ONLY

Capital Expenditure Request

Requested By: Matt Smith

Short Description: Beverage merchandise for juices

Amount Requested: 22000

Expenditure Classification: × New Asset

Mandatory for National Park Services Contracts Only: ⋮

Complete Description, Expected Benefits & Consequences If Disapproved: Need additional refrigerated beverage display case

Names of three Companies and Amounts of Bids for this Request - For Kitchen Equipment quotes, contact TriMark at sacustomerservice@trimarkusa.com, include shipping address. No Other Quotes Necessary

Selected Vendor: ⋮

Other Bid 1: ⋮

Other Bid 2: ⋮

Reason for not selecting low bid: ⋮

Amount in Capital Budget: 0

OK Cancel

33

Complete the next 3 fields: Selected Vendor, Other Bid 1 and Other Bid 2.

Capital Expenditure Request for Charge to GSI ONLY

Capital Expenditure Request

Requested By	Matt Smith
Short Description	Beverage merchandise for juices
Amount Requested	22000
Expenditure Classification	× New Asset
Mandatory for National Park Services Contracts Only	
Complete Description, Expected Benefits & Consequences If Disapproved	Need additional refrigerated beverage display case.
Names of three Companies and Amounts of Bids for this Request - For Kitchen Equipment quotes, contact TriMark at sacustomerservice@trimarkusa.com , include shipping address. No Other Quotes Necessary	Trimark
Selected Vendor	
Other Bid 1	
Other Bid 2	
Reason for not selecting low bid	
Amount in Capital Budget	0

OK Cancel

34 Enter "Reason for not selecting low bid" field.

Capital Expenditure Request for Charge to GSI ONLY

Capital Expenditure Request

Requested By	Matt Smith
Short Description	Beverage merchandise for juices
Amount Requested	22000
Expenditure Classification	× New Asset
Mandatory for National Park Services Contracts Only	
Complete Description, Expected Benefits & Consequences If Disapproved	Need additional refrigerated beverage display case.
Names of three Companies and Amounts of Bids for this Request - For Kitchen Equipment quotes, contact Trimark at sacustomerservice@trimarkusa.com, include shipping address. No Other Quotes Necessary	Trimark
Selected Vendor	Trimark
Other Bid 1	Trimark
Other Bid 2	Trimark
Reason for not selecting low bid	
Amount in Capital Budget	0

OK Cancel

35 Enter the "Amount in Capital Budget" field. This is the amount approved by the CFO during Budget.

Capital Expenditure Request for Charge to GSI ONLY

Capital Expenditure Request

Requested By	Matt Smith
Short Description	Beverage merchandise for juices
Amount Requested	22000
Expenditure Classification	× New Asset
Mandatory for National Park Services Contracts Only	
Complete Description, Expected Benefits & Consequences If Disapproved	Need additional refrigerated beverage display case.
Names of three Companies and Amounts of Bids for this Request - For Kitchen Equipment quotes, contact Trimark at sacustomerservice@trimarkusa.com, include shipping address. No Other Quotes Necessary	Trimark
Selected Vendor	Trimark
Other Bid 1	Trimark
Other Bid 2	Trimark
Reason for not selecting low bid	Preferred vendor
Amount in Capital Budget	0

OK Cancel

36 Verify the information that you entered, then click "OK".

Expenditure Classification	New Asset
Mandatory for National Park Services Contracts Only	
Complete Description, Expected Benefits & Consequences If Disapproved	Need additional refrigerated beverage display case.
Names of three Companies and Amounts of Bids for this Request - For Kitchen Equipment quotes, contact TriMark at sacustomerservice@trimarkusa.com, include shipping address. No Other Quotes Necessary	Trimark
Selected Vendor	Trimark
Other Bid 1	Trimark
Other Bid 2	Trimark
Reason for not selecting low bid	Preferred vendor
Amount in Capital Budget	50000
<div>OK Cancel</div>	

37 Click "Done"

Amount Requested	22000
Expenditure Classification	New Asset
Mandatory for National Park Services Contracts Only	(empty)
Complete Description, Expected Benefits & Consequences If Disapproved	Need additional refrige
Names of three Companies and Amounts of Bids for this Request - For Kitchen Equipment quotes, contact TriMark at sacustomerservice@trimarkusa.com, include shipping address. No Other Quotes Necessary	Trimark
Selected Vendor	Trimark
Other Bid 1	Trimark
Other Bid 2	Trimark
Reason for not selecting low bid	Preferred vendor
Amount in Capital Budget	50000
<div>Done</div>	

38 Go to your Inbox to find the Opportunity Project you just completed.

The screenshot shows a web application interface. At the top, there is a green header bar with a close button (X). Below the header, there is a dark grey navigation bar with a 'My Tasks' button. The main content area has a light grey background. On the left, there is a search bar with the text 'create opportunity project' and a close button (X). On the right, there are three icons: a bell, a folder with a red notification badge, and a user profile icon. Below the search bar, there is a large white rectangular area. In the center of this area, there are two labels: 'Start Date' with the value '05/06/2024' and 'End Date' with the value '(empty)'. Below this area, there are two tabs: 'History' and 'Attachments'. At the bottom right, there is a PDF icon.

39 Click "Submit"

Transfer: ASSET-00002926 (Chip 04/18/2024 ☆
acks) on 04/18/2024

Invoice: SUPINV-00000132, 04/08/2024 ☆
OUTDOORS INC on
24 for \$15,159.55
01/12/2024

Evaluation: Salaried 02/09/2024 ☆
nce Review - Administrative:
man (024963)
5/2024
02/29/2024

Transfer: ASSET-00007275 02/06/2024 ☆
ler) on 02/05/2024

3. Use the 'Additional Data' tab on the Project to record CER c
4. After the CER details have been entered on the Project, go
the 'Submit' button on the To-Do task to mark it as complete
CER to the Unit VP for approval.

Note: This form is ONLY for CERs Charge to GSI

View Project

enter your comment

Submit

Save for Later

Close

- 40 This will route to your VP for approval.

The screenshot displays the Guest Services system interface. At the top, there's a header with the Guest Services logo and a search bar containing the text "create opportunity project". Below the header, the interface is divided into sections. On the left, there's a sidebar with "Tasks" and "Searches". The main area is titled "All Items" and contains a search bar with "Search: All It". A modal window titled "Enter Capital Expenditure Request details" is open, showing the following information: "Up Next: Laura Sherman (012217) | To Do: Review Capital Equipment Funding Request | Due Date 05/08/2024". Below this, there's a "View Details" link. The modal also displays a list of items: "Asset Transfer: ASSET-00002926 (Chip & candy racks) on 04/18/2024" and "Supplier Invoice: SUPINV-00000132, JOHNSON OUTDOORS INC on 01/12/2024 for \$15,159.55". The modal also shows a table with "Overall Process", "Overall Status", and "Due Date" information.

Overall Process	Asset Transfer:
Overall Status	In Progress
Due Date	04/19/2024

Details to Review

Asset Information

- 41 Once approved by the VP, it will route to the CFO. If \$20,000 or more, it will then route to the CEO. Once approval process is completed, it will route to the Business Asset Accountant to convert from an Opportunity Project to a Project.

Refer to "How to Find Projects" instructions to see if the project has been approved.

- 42 Once the Opportunity Project becomes an approved Project, send your invoice through regular GSI email to the Business Asset Accountant (HoangNga LuTan). Make sure to include on the invoice the Project ID number, Project Name, amount to be paid, signature and date.

- 43 Once asset is placed in service, please refer to "How to Place Asset in Service" instructions.