



Recently a few changes have been implemented in Adaptive Planning that will assist units in more clearly identifying project requests that will be funded by their approved bundled project for each fiscal year.

If your unit has an approved FY2022 Capital Plan Bundled Project, you will be contacted separately to ensure any child projects that have been created already in Workday will be updated appropriately.

Adaptive Planning Support

- Capital Planner – [Kevin Markielowski](#)

e-Builder Support

- Campus employees – [Leeanne Chandler](#)
- Health System employees – [Teresa Yu](#)

What is Not Changing

A bundled project is a request for a lump sum amount that will fund multiple projects throughout the fiscal year. These requests are submitted on the Capital Project Requests sheet in Adaptive Planning and follow the capital planning process for approval. It is important to select Bundled Project as the Request Type for these project requests. If approved, the ** Capital Core Approval column will be updated to Capital Plan Approved by the Capital Planner. If a unit selected Yes in the Managed in e-Builder column, the FOD Design and Construction Program Administrators will create the project in e-Builder and update the respective e-Builder Project # column in Adaptive Planning. After the project is created in e-Builder, or if a unit selected No in the Managed in e-Builder column, the approved projects are created in Workday by the company’s Finance FDM Administrator, who will add the associated project ID in the ** Workday Project ID column.

Project	Request Type	Managed in e-Builder	e-Builder Project #	** Workday Project ID	** Capital Core Approval
Project #1	Bundled Project	No	PJ999999		Capital Plan Approved
Project #2	Bundled Project	Yes	OSU-888888	PJOSU-888888	Capital Plan Approved

What is Changing

When a unit identifies a project that will utilize funds from their bundled project, the request should be submitted on the Non Capital Project Request sheet in Adaptive Planning. To appropriately identify these projects (referenced as child projects) in both Adaptive Planning and Workday, units need to ensure the following columns are completed:



Adaptive Planning Column	Required Value
Capital ?	Yes
Request Type	Bundled Project
Bundled Project – Workday Project ID NEW!	Input the Workday Project ID of your bundled project
Unit Approval Status	Submitted or Approved

If a unit selected Yes in the Managed in e-Builder column, the FOD Design and Construction Program Administrators will create the child project in e-Builder and update the respective e-Builder Project # column in Adaptive Planning. If an estimate is generated and the unit approves it, they will need to update the Unit Approval Status to Approved to ensure it also gets created in Workday. After the project is created in e-Builder, or if a unit selected No in the Managed in e-Builder column, the approved child projects are created in Workday by the company’s Finance FDM Administrator, who will add the associated project ID in the ** Workday Project ID column.

Project Name	Capital ?	Request Type	Bundled Project – Workday Project ID (NEW!)	Managed in e-Builder	e-Builder Project #	** Workday Project ID	Unit Approval Status
Child Project #1 (funded by Bundled Project #1)	Yes	Bundled Project	PJ999999	No		PJ111111	Approved
Child Project #2 (funded by Bundled Project #1)	Yes	Bundled Project	PJ999999	No		PJ222222	Approved
Child Project #3 (funded by Bundled Project #1)	Yes	Bundled Project	PJ999999	Yes	OSU-333333	PJOSU-333333	Approved

To help associate the bundled and children projects in Workday, the value added by the unit in the new Bundled Project – Workday Project ID column will be added to the Project Dependency field on the child project in Workday. All child projects that will be funded with the same bundled project will appear in the Prerequisite For field on the bundled project. See below screenshots for how the bundled/child project relationship will appear in Workday.



Workday Screenshot #1 – Bundled Project

Project Summary		Reference Information	
Project Name	Bundled Project #1	Project Hierarchy	All Projects
Start Date	01/01/2021	Optional Project Hierarchies	(empty)
End Date	12/31/2021	Project ID	PJ999999
Status	Approved	Include Project ID in Name	Yes
Owner	(empty)	Inactive	No
Description	(empty)	Billable	No
		Capital	Yes
		Company	The Ohio State University
		Project Currency	USD
		Customer	(empty)
		Balancing Worktag	Fund: FD830 Investment in Plant Fund
		Optional Balancing Worktags	(empty)
		Project Groups	Capital
		External Project Reference	(empty)
		Prerequisite For	PJ111111 Child Project #1 (funded by Bundled Project #1) PJ222222 Child Project #2 (funded by Bundled Project #1) PJOSU-333333 Child Project #3 (funded by Bundled Project #1)
		Dependencies	(empty)



Workday Screenshot #2 – Child Projects

Project Summary		Reference Information	
Project Name	Child Project #1 (funded by Bundled Project #1)	Project Hierarchy	All Projects
Start Date	01/01/2021	Optional Project Hierarchies	(empty)
End Date	12/31/2021	Project ID	PJ111111
Status	Approved	Include Project ID in Name	Yes
Owner	Wei Qu	Inactive	No
Description	(empty)	Billable	No
		Capital	Yes
		Company	The Ohio State University
		Project Currency	USD
		Customer	(empty)
		Balancing Worktag	Fund: FD830 Investment in Plant Fund
		Optional Balancing Worktags	(empty)
		Project Groups	Capital
		External Project Reference	(empty)
		Prerequisite For	(empty)
		Dependencies	PJ999999 Bundled Project #1