



Business Process - Using the GL_PROJ_UPDATE Role to Update a Project's Status, Manager, and Start and End Dates

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Changes in This Revision

Changes made in this revision of the document basically consist of the following:

- New screen shots to reflect the changes in screens that resulted from the April 2009 upgrade to version 9.0 of PeopleSoft Financials.
- Wordsmithing

Overview

Since moving to the current PeopleSoft general ledger system, non financial data changes to projects in the general ledger have been made centrally by the System Accounting Department based on requests received from the campuses. Pursuant to requests from campus Sponsored Programs personnel to manage certain data changes themselves and pursuant to an A-133 audit finding, we developed a general ledger role, **GL_PROJ_UPDATE**, which enables designated campus users to make the following project data changes:

- Inactivate a project and change the status to hold.
- Activate a project and change the status to open.
- Update the project manager.
- Update the project start and end dates.

We will discuss effective dating more in the section of this document titled, 'Explanation of 'Effective Dating'; however, please note that you will only be able to enter an effective date equal to the current date or later. If a data change needs to be effective earlier than the current day's date you will need to contact the System Accounting Department to make the change. You will also need to contact the System Accounting Department to change a project to inactivate/closed.

When the System Accounting Department is running the monthly allocations and the interim benefit allocations you will be unable to make changes to the projects. We will temporarily remove the **GL_PROJ_UPDATE** role from your security setup. Each time we remove and add the role you will automatically receive an e-mail from the PeopleSoft system. Please note that this notice is after the fact. Therefore, you need to refer to the following calendars posted on the web at <http://www.maine.edu/system/oft/actgschedule.php> to see when the role will be unavailable to you.

General Ledger Monthly Closing Schedule – Fyxx

Interim Benefit Allocation Schedule - FYxx

In the remainder of this document we explain the process for making the above noted changes to projects and the parameters under which you may make the changes.

Key Assumptions

In writing this document, we assumed the reader:



- Knows how to log into  and how to access the financials module,



- Is familiar with the general ledger project chartfield and how it should be used, especially in relation to grants and contracts.

Explanation of ‘Effective Dating’

The current production version of our general ledger enables us to effective date data related to a project’s status, manager, and start and end dates. This enables you to maintain a history in the general ledger of how the information has changed over time. For example, in April 2007 you are awarded a grant that runs 7/1/07 – 06/30/09. In late May 2009, you receive approval to operate the grant through 12/31/09. To keep the history for this project, at the time you receive the extension you would add a new effective dated row and change the end date to 12/31/09. You can also enter an explanation of why the end date changed. Information in the ledger for the project would look as follows:

Project
Description

Project

SetID: UMSYS
 Project: 5404009
 *Description: Phase 2 - Focus 4 *Status: Active [Attributes](#)
 *Start Date: 07/01/2007
 *End Date: 12/31/2009 Summary Project

Project Manager			Customize Find View All First 1 of 1 Last
Effective Date	Manager	Manager Name	
07/01/2007	0022621	Dagher,Habib-J	+ -

Project Status		Customize Find View All First 1 of 1 Last
Effective Date	Project Status	
07/01/2007	Open	+ -

Project Start and End Dates				Customize Find View 1 First 1-2 of 2 Last
Effective Date	Start Date	End Date	Description	
05/31/2009	07/01/2007	12/31/2009	6 month extension received from sponsor	+ -
07/01/2007	07/01/2007	06/30/2009		+ -

Save
Return to Search
Notify

Update/Display
Correct History

[Project](#) | [Description](#)

The PeopleSoft system categorizes effective-dated rows into the following basic types:

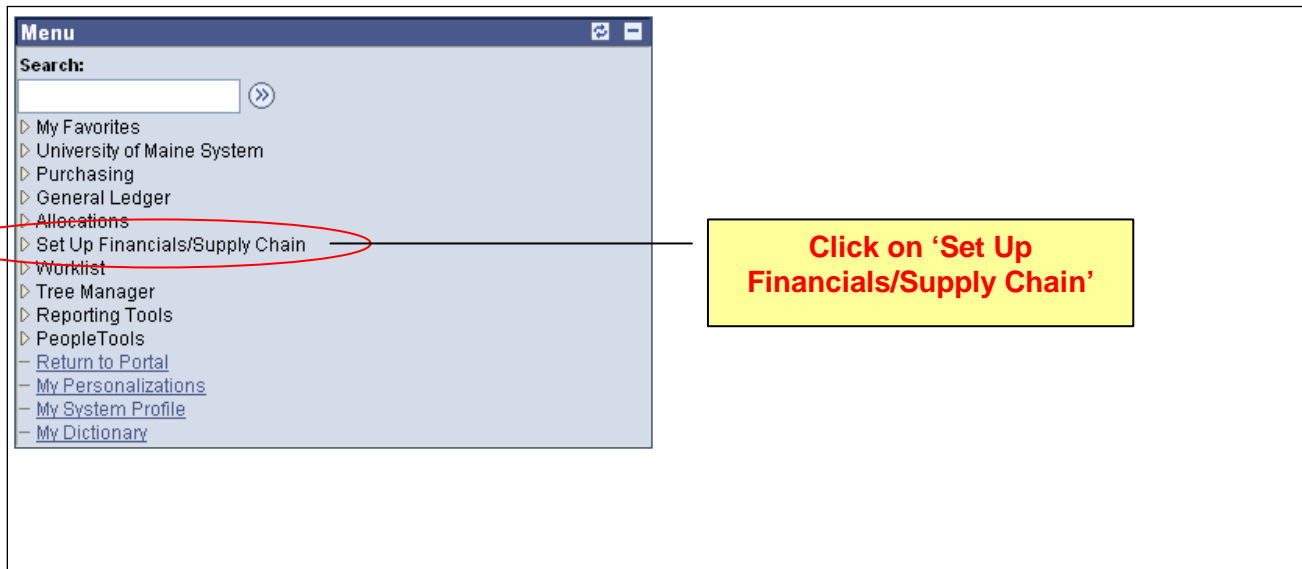
Current The data row with the date closest to—but not greater than—the system date. Only one row can be the current row.

History Data rows that have effective dates earlier than the current data row.

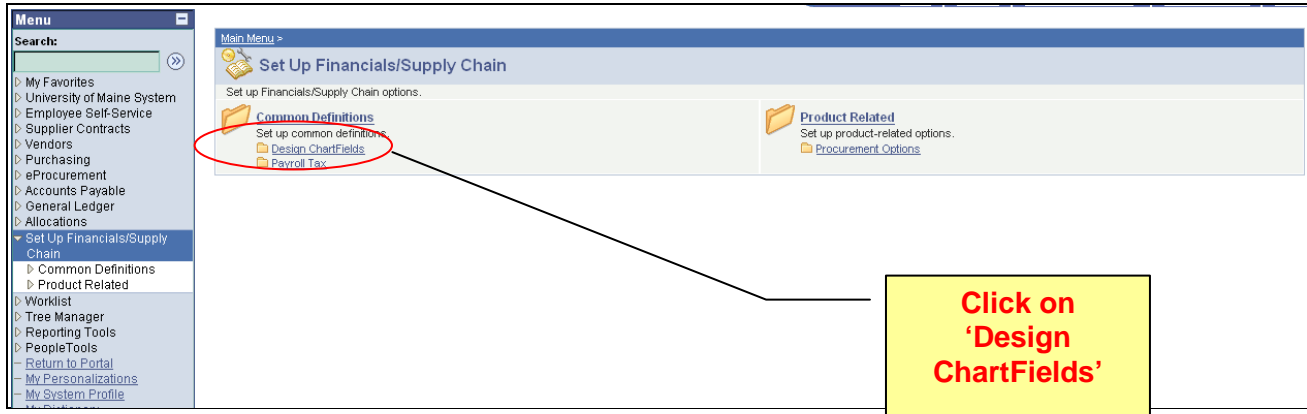
Future Data rows that have effective dates later than the system date.

How to Access the Project Page in PeopleSoft in Order to Make Changes

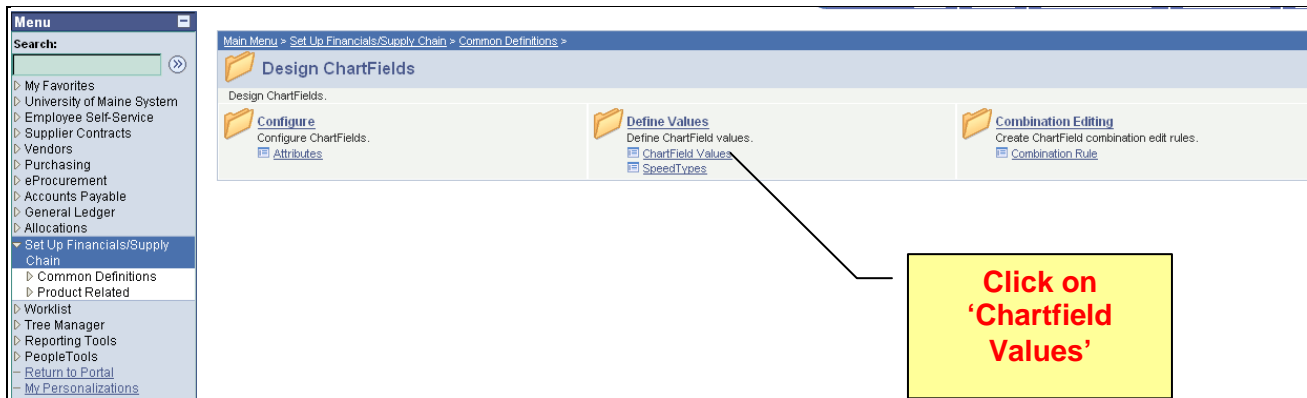
To make a change to the project status, manager, or dates you must first log into the financials module in Maine Street. Once you have logged in, you will see a screen similar to the one below. Please note that your screen will vary depending on what level of security you have. Click on 'Set Up Financials Supply Chain'.



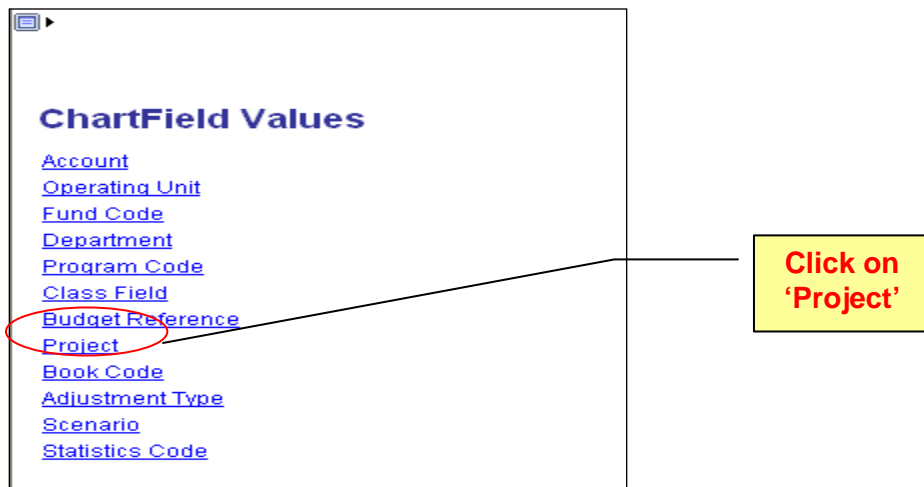
You will then receive a screen similar to the following. Click on 'Design ChartFields'.



You will then receive a screen similar to the following. Click on 'Chartfield Values'.



You will then receive a screen that looks as follows. Click on 'project'.



This will bring you to a search page. The setID should default to UMSYS. If not, type in **UMSYS**.

Project ID
Enter any information you have and click Search. Leave fields blank for a list of all values.


Find an Existing Value

SetID: = UMSYS

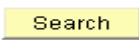
Project: begins with

Description: begins with

Correct History Case Sensitive

Search Clear [Basic Search](#)  [Save Search Criteria](#)

The SetID should be UMSYS

You also need to enter the number of the project to which you want to make changes. For illustration purposes, we have entered 6480800. To ensure that you can see all historical lines for this project, please be sure that the 'Correct History' box is checked. Click .

Project ID
Enter any information you have and click Search. Leave fields blank for a list of all values.


Find an Existing Value

SetID: = umsys

Project: begins with 6480800

Description: begins with

Correct History Case Sensitive

Search Clear [Basic Search](#)  [Save Search Criteria](#)

Enter your project number and then click the search button.

As you can see from the following screen, the project is currently active and open, effective 7/1/08.

The screenshot displays a web-based project management interface. At the top, there are tabs for 'Project' and 'Description'. Below the tabs, the project details are shown:

- SetID:** UMSYS
- Project:** 6480800
- Description:** MRTQ OC & FS 08/09
- Status:** Active (highlighted with a red circle)
- Start Date:** 10/01/2008
- End Date:** 09/30/2009

Below the details, there is a 'Summary Project' section with three tables:

Project Manager			
Effective Date	Manager	Manager Name	
07/01/2008	0019059	Dean, Allyson	+ -

Project Status	
Effective Date	Project Status
07/01/2008	Open

Project Start and End Dates			
Effective Date	Start Date	End Date	Description
07/01/2008	10/01/2008	09/30/2009	

At the bottom of the interface, there are several buttons: 'Save', 'Return to Search', 'Notify', 'Update/Display', and 'Correct History'. A link for 'Project | Description' is also visible.

How to Change a Project to Inactive/Hold or Active/Open

Once you have navigated to the project page within PeopleSoft general ledger (as described in the previous section of this document titled, 'How to Access the Project Page in PeopleSoft in Order to Make Changes'), you can update the project status. As noted earlier, the **GL_PROJ_UPDATE** role gives you access to change a project from active/open to inactive/hold and from inactive/hold to active open. Changing a project to inactive/closed will remain the responsibility of the System Accounting Department.

Please note that there are two status fields on the project page: 'status' and 'project status'.

Cannot be effective dated. The project is either active or inactive at a given point in time.

The project's status as open, hold, or closed can and should be effective dated.

Project Description

Project Manager Summary Project

Effective Date	Manager	Manager Name
07/01/2008	0019059	Dean, Allyson

Project Status

Effective Date	Project Status
07/01/2008	Open

Project Start and End Dates

Effective Date	Start Date	End Date	Description
07/01/2008	10/01/2008	09/30/2009	

Save Return to Search Notify Update/Display Correct History

The status (e.g., active or inactive) cannot be effective dated; however, the project status as open, hold, or closed can be effective dated and should be effective dated. Because the change in a project from active to inactive or inactive to active occurs immediately, the effective date you use for the project status should be the current day's date (e.g., the day you activate or inactivate the project).

Because changing a project to 'hold' without inactivating the project will not stop entries from posting to the project, we have designed the system to only allow you to enter two combinations: active/open or inactive/hold.

Please note that before you inactivate a project you must ensure that payroll and accounts payable encumbrances for the project are at zero. If a project is inactive at the time a journal entry feeds from one of these systems to the general ledger, the entire entry will error out.

For illustration purposes, we will change the project status for project 6480800 from the current status of active/open to inactive/hold. We will use today's date of May 7, 2009 as the effective date for the new project status.

First, you must add a new effective dated row under project status by clicking on the **+** beside the current row.

The screenshot shows the 'Project Manager' interface. At the top, there are tabs for 'Project' and 'Description'. Below this, the 'Project' details are displayed: SetID: UMSYS, Project: 6480800, Description: MRTQ OC & FS 08/09, Status: Active, Start Date: 10/01/2008, End Date: 09/30/2009. A 'Summary Project' section contains three tables. The first table, 'Project Manager', has one row with columns for Effective Date, Manager, and Manager Name. The second table, 'Project Status', has one row with columns for Effective Date and Project Status. A red box highlights the plus sign (+) to the right of the 'Project Status' row. The third table, 'Project Start and End Dates', has one row with columns for Effective Date, Start Date, End Date, and Description. At the bottom, there are buttons for Save, Return to Search, Notify, Update/Display, and Correct History.

Click on the plus sign for the most current row in order to add a new row.

The effective date for the new row defaults to the current day's date – in this case, 5/7/2009.

This screenshot shows the same 'Project Manager' interface as the previous one, but with a new row added to the 'Project Status' table. The new row has an effective date of 05/07/2009 and a status of 'Open'. The 'Effective Date' field for the new row is circled in red. The 'Project Status' table now shows two rows. The 'Project Manager' table and 'Project Start and End Dates' table remain the same. The buttons at the bottom are the same as in the previous screenshot.

You must now change the status in the new row you created by clicking on the drop down box for project status and selecting 'Hold'.

The screenshot shows the 'Project' details for SetID: UMSYS, Project: 6480800, and Description: MRTQ OC & FS 08/09. The main status is 'Active'. Below this, there are three summary tables:

- Project Manager:** Shows one entry for Manager Name 'Dean, Allyson' with Effective Date '07/01/2008'.
- Project Status:** Shows two entries. The first entry has an Effective Date of '05/07/2009' and a Project Status of 'Hold'. The second entry has an Effective Date of '07/01/2008' and a Project Status of 'Open'. A yellow callout box with red text points to the 'Hold' status in the first row, stating: "Select 'Hold' from the drop down box."
- Project Start and End Dates:** Shows one entry with Effective Date '07/01/2008', Start Date '10/01/2008', and End Date '09/30/2009'.

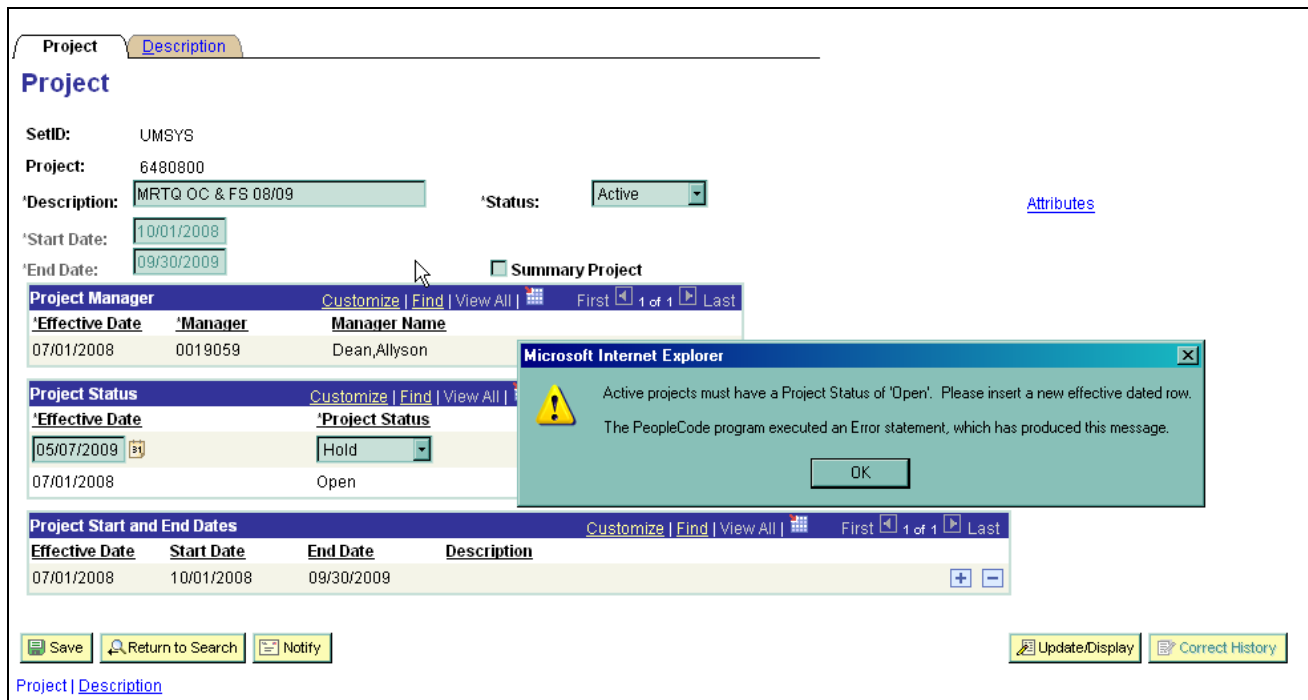
At the bottom, there are buttons for 'Save', 'Return to Search', 'Notify', 'Update/Display', and 'Corre'.

As a final step before saving your changes, you must inactivate the project by clicking on the indicated drop down box and selecting 'inactive'.

This screenshot is similar to the previous one, but the main project status has been changed to 'Inactive'. A yellow callout box with red text points to the 'Inactive' status in the main status field, stating: "Select 'inactive' from the drop down box." The 'Project Status' table remains the same as in the previous screenshot.

Click on  to save your changes.

Please note that if you tried to save your changes before inactivating the project you would get the following message:



The screenshot displays the Project Manager interface with the following data:

Effective Date	Manager	Manager Name
07/01/2008	0019059	Dean, Allyson

Effective Date	Project Status
05/07/2009	Hold
07/01/2008	Open

Effective Date	Start Date	End Date	Description
07/01/2008	10/01/2008	09/30/2009	

The process to later change the project back to active/open would be similar to what was just illustrated. You would:

1. Navigate to the project page.
2. Add a new effective dated row for project status.
3. Change the project status to 'open'.
4. Select a status of 'active'.
5. Save your changes.

How to Update the Project Manager

Once you have navigated to the project page within PeopleSoft general ledger (as described in the prior section of this document titled, 'How to Access the Project Page in PeopleSoft in Order to Make Changes'), you can update the project manager.

For illustration purposes we will change the project manager for project 6480801. Using an effective date of July 1, 2009 we will change the project manager to James Campbell (ID 0011248).

To add a new effective dated row click on the  next to the current row for project manager.

Click the plus sign to create a new effective dated row.

Attributes

Effective Date	Manager	Manager Name
07/01/2008	0013137	Lahti,Michel

Project Manager | Customize | Find | View All | First 1 of 1 | Last

The effective date defaults to the current day's date.

The default date is today's date. You will need to change this to the effective date of the project manager change.

Effective Date	Manager	Manager Name
05/07/2009	0013137	Lahti,Michel
07/01/2008	0013137	Lahti,Michel

Project Manager | Customize | Find | View All | First 1 of 2 | Last

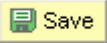
You will need to change the date to the date you want the change to be reflected. In our illustration the date should be 07/01/2009. **Please note that the year should be entered as 4 digits (e.g. 2009) rather than 2 digits (e.g., 09).** If you enter 2 digits PeopleSoft may interpret the date as 19xx rather than 20xx.

Enter the employee ID number for the new manager and hit the Enter key on your keyboard. The system will automatically update the manager's name based on the number entered.

The screenshot shows the PeopleSoft Project page for project 6480801. The project description is 'MHC Peaceable Stories Eval' and the status is 'Active'. The start date is 01/01/2009 and the end date is 10/31/2009. The 'Project Manager' table is highlighted with a red circle, showing the following data:

Effective Date	Manager	Manager Name
07/01/2009	0011248	Campbell, James
07/01/2008	0013137	Lahji, Michel

Other sections visible include 'Project Status' (Open) and 'Project Start and End Dates' (07/01/2008 to 10/31/2009). Buttons for 'Save', 'Return to Search', 'Notify', 'Update/Display', and 'Correct' are at the bottom.

To save your changes, click on  . You can now exit the page by navigating to a different

PeopleSoft page or update the information for another project by clicking  .

How to Update the Project Start Date or End Date

Once you have navigated to the project page within PeopleSoft general ledger (as described in the prior section of this document titled, 'How to Access the Project Page in PeopleSoft in Order to Make Changes'), you can update the project start and end dates.

For illustration purposes we will change the project end date for project 6480802. We will assume that in late May 2009 we received permission to extend the project end date from 6/30/2009 to 12/31/2009.

To add a new effective dated row click on the  next to the current row for project start date and end date.

The screenshot shows the 'Project Summary Project' section. It contains three tables: 'Project Manager', 'Project Status', and 'Project Start and End Dates'. The 'Project Start and End Dates' table has a plus sign in the last column of its first row, which is highlighted by a yellow callout box.

Effective Date	Start Date	End Date	Description
07/01/2008	04/01/2009	06/30/2009	

Click the plus sign to create a new effective dated row.

The effective date defaults to the current day's date. You will need to change the date to the date you want the change to be reflected. **Please note that the year should be entered as 4 digits (e.g. 2009) rather than 2 digits (e.g., 09).** If you enter 2 digits PeopleSoft may interpret the date as 19xx rather than 20xx. (Note: to see the history lines, click on view all in the blue bar).

The screenshot shows the 'Project Start and End Dates' table with a new row added. A yellow callout box points to the 'View All' button in the table's header bar.

Effective Date	Start Date	End Date	Description
05/31/2009	04/01/2009	12/31/2009	Extension received from sponsor
07/01/2008	04/01/2009	06/30/2009	

Enter the effective date of the change, the new start or end date, and a note about why the change was made.

Click view all to see the history lines.

If you want the change in the project dates to be effective earlier than the current day's date you will need to contact the System Accounting Department to have them make the change. If you try to enter an earlier date, the system will give you the following error message:

The screenshot shows the PeopleSoft Project Update interface. The 'Project Manager' table is as follows:

Effective Date	Manager	Manager Name
07/01/2008	0021115	Kaley,Lori

The 'Project Status' table is as follows:

Effective Date	Project Status
07/01/2008	Open

The 'Project Start and End Dates' table is as follows:

Effective Date	Start Date	End Date	Description
05/01/2009	04/01/2009	06/30/2009	
07/01/2008	04/01/2009	06/30/2009	

The error message dialog box is titled 'Microsoft Internet Explorer' and contains the following text:

You are not authorized to update the effective date with a date prior than today.
The PeopleCode program executed an Error statement, which has produced this message.

Buttons visible in the interface include: Save, Return to Search, Notify, Update/Display, and Correct History.

Once you have finished making your changes, click  .

Tips and Reminders

Here are some tips and items to remember when making data changes for a project. We mentioned some of these in other parts of this document; however, they bear mentioning again.

- In this document we have separately illustrated making changes to the project status, the project manager, and the project start and end dates. Although it would be rare, you could actually update all of these items for a single project within one update session.
- Before inactivating a project you need to ensure that there are no outstanding payroll (salary/wage) or accounts payable encumbrances associated with the project.
- So that you can quickly navigate to the project page in the future, you may want to add the project page to 'My Favorites' within PeopleSoft. Simply navigate to the project page using the following navigation: *Set Up Financials/Supply Chain> Design ChartFields>ChartField Values>Project.*

Once you arrive at the project search page, click on the 'Add to Favorites' link in the upper right corner.



The system will default to a description of 'Chartfield Values'. You can keep this description or you can change it to something else. To illustrate, we have changed the description to 'Project update'. Hit and the system will add it to your list of favorites which you can access from your main menu within PeopleSoft financials:

