



**UW System
Shared Financial System
(SFS)**



Project Lite Training Manual

PeopleSoft Version 8.9

Ver 1.2 April, 2010

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Background:

The University of Wisconsin campuses create projects to track spending, revenue, financial reporting, collect data used to meet compliance requirements and various other purposes. The University of Wisconsin purchased the Oracle (PeopleSoft) Grants module to accommodate future grants processing. The campuses using this module in Phase 1 are Madison, Milwaukee and Extension. In addition, the Grants module will not be tracking non-sponsored projects for Madison, Milwaukee or Extension (includes Gift projects) nor sponsored and non sponsored projects for campuses not using the Grants module. Project Lite is the other option users may access to create projects. Madison, Milwaukee and Extension will use this functionality for the creation of their non sponsored projects (including gifts). The remaining campuses will use Project Lite to create both sponsored and non sponsored projects.

Project Lite is comprised of three panels of the PeopleSoft Project Costing Module, and two customized panels. The customized panels will be used to collect data for financial reporting. Users will be able to access Project information created in Project Lite through the WISDM reporting tool. Users who use both the grants module and Project Lite will notice consistency in project data elements; regardless of where the project is created.

Purpose for “Project Lite:

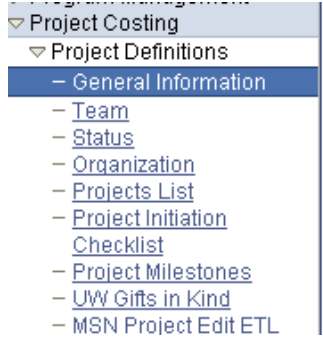
Project Lite has four functions:

1. Create Unique Project numbers within PeopleSoft
2. To replace ESIS type data for Gift projects
3. Collect data for sponsored projects for those campuses not using Oracle Grants module.
4. Gifts in Kind activity

This training manual will be separated into sections according to the function the user is trying to perform. Each section will describe what is required to be entered according to the Project Lite functions described above. Please also see the section on “updating” project information.

A. Create a Unique Project Number within SFS/PeopleSoft Adding a Project

1. **Navigation: Project Costing > Project Definitions > General Information > Add a New Value**



General Information

[Find an Existing Value](#)
Add a New Value

Business Unit:

Project:

Create:

[Find an Existing Value](#) | [Add a New Value](#)

2. Click **Add** - The user should confirm that the proper business unit value appears in the business unit field. Business unit field information should be automatically assigned based upon user security. (Ex: A UW Extension user will only be able to enter a business unit of UWEXT.)

Note: Project field is assigned. Project is grayed out. This is to ensure that users create projects using the new project numbering format of PRJ##AA (## = number, number, AA = alpha, alpha). After the general information page is completed and saved, the project will be assigned the next available sequential project number.

The screenshot shows the Oracle Project Costing Definition form. The 'Project' field is 'NEXT'. The 'Description' field is empty. The 'Start Date' and 'End Date' are both '08/02/2007'. The 'User ID' is 'T2J'. The form also includes sections for 'Project Schedule' and 'Budgetary Control Dates'.

3. Complete the following fields:

(Note: Notice that the project number is not assigned at this point. The project number will be assigned after the general information page has been completed and the save button has been selected.

Description: Type in a short description for the project – the description can not exceed 56 characters.

Integration: Type in the user’s Business Unit. (Ex. UWADM, UWEXT, etc) **(This field is a REQUIRED FIELD)**

Project Type: This describes the funding source of the project.

Options are:

Project Type	Description
FEDR	Federal Grant Project
GIFT	Gift or Donation - Non-Grants
INTRN	Internal Project - Non-Grants
PRIV	Private Grant Project
STATE	State - GPR Fund Grant Project
TRUST	Trust Project - Non-Grants

Owning Dept: A 6 digit number identifies which department has administrative authority for the project.

UW Project Type: This further defines what type of project this is

Options are: See Appendix A

Project Schedule:

Start Date: Project start date.

End Date: Project end date.

Budgetary Control Dates: (NOTE: If the user enters date information in these fields the dates will be used for editing of financial transactions.

If the user does not want to edit start and end dates for this project, DO NOT ENTER dates in these fields)

Start Date: If spending on the project needs to precede the project start date the user should enter a date in this field that will accommodate pre project spending.

End Date: If spending on the project needs to exceed the project end date the user should enter a date in this field that will accommodate the post project spending.

Description Fields: There are two fields, a Description field and a Long Description field to enter more detailed project information.

4. Click on the **SAVE** button
5. Once the user clicks the **SAVE** button, additional hyperlinks will populate for use.
6. Please click on **Project Team**

[New Window](#) | [Help](#) | [Customize Page](#) |

Team | **Team Detail**

Project: PRJ111C Description: SUN EFFECTS Processing Status: Active
 Start Date: 08/21/2007 End Date: 08/21/2007

Project Team Members Customize | Find | View All | First | 1 of 1 | Last

EmpID	Name	Project Role	Project Manager	Email Notify	Start Date	End Date
Team Member						

Add Members Using Job Code Remove Members Using Job Code

Job Code	Default Project Role	Add Team Members	Job Code	Remove Team Members
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Add Team Member Save as Template Import from Template

Go To: [Team Rates](#)
[Return to General Information](#)

7. Click on the **Team Detail** Tab to add team information.

Team | **Team Detail**

Project: PRJ111C Description: SUN EFFECTS Processing Status: Active
 Start Date: 08/21/2007 End Date: 08/21/2007

*Employee ID: Name:
 Email ID: Email Notify for Status Change

Description:

Availability dates Customize | Find | View All | First | 1 of 1 | Last

Project Role	Project Manager	Start Date	End Date
1	<input type="text"/>	08/21/2007	08/21/2007

Activity Team Customize | Find | View All | First | 1 of 1 | Last

Activity	Description	Start Date	End Date
Add Member to Activity Team			

Note to users: Project number, project description, processing status, start date and end date information will automatically appear at the top of the team detail panel.

8. Click on the Employee ID magnifying glass to search for the Principal Investigator.

Look Up Employee ID

Business Unit: UWADM

Employee ID: begins with

Name: begins with

Department ID: begins with

Department: begins with

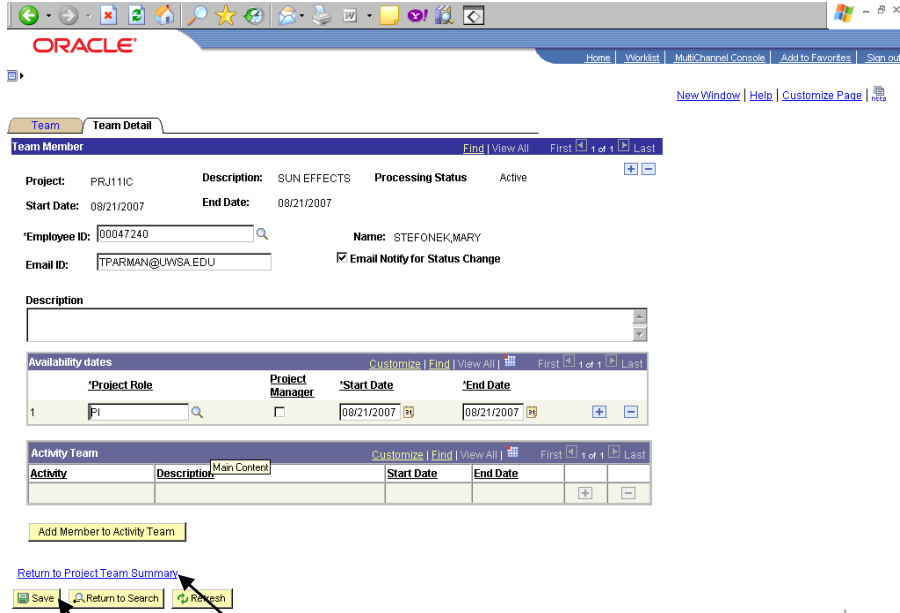
Look Up Clear Cancel Basic Lookup

Search Results

View All First 1-100 of 100 Last

Name	Department ID	Department	Employee ID
RINDER RONALD	101500	Academic and Student Services	00001758
BRADLEY DOUGLAS	010500	Communications	00005945
SHEPPARD JANICE	101500	Academic and Student Services	00013589

- There are several search options. The user may want to try to search for the PI's name. Start by entering the first few letters of the Principal Investigator's **last** name and then click the **Look Up** button. Proper spelling of the employee's name is essential in order to locate the Principal Investigator's name.
9. **Email ID** –Enter a full email address if the user would like a Regent Notice sent to additional individuals besides the Principal Investigator. **(For example, one person interested in receiving project updates may be a department's Grants Accountant)**
10. **Project Role** – The role of Principal Investigator will be the default project role.
- Enter **PI** into the Project Role field
 - Click on the Project Manager Checkbox



11. Click on the Save button

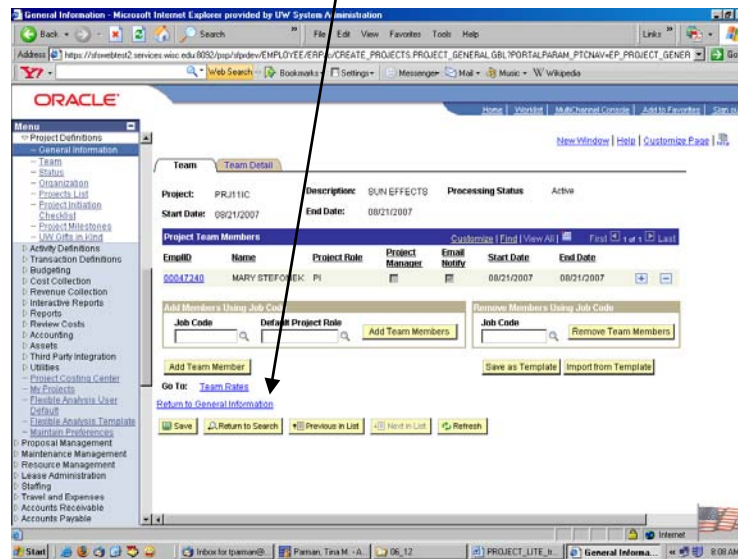
12. Click on the hyperlink

[Return to Project Team Summary](#)

13. On the next screen click on the

[Return to General Information](#)

hyperlink.



14. This completes the entry needed to obtain a project number.

Complete User field panel (OPTIONAL)

The user field panel contains five fields that a user may enter information in, as pertinent to their organizational needs. The information in these fields will appear in WISDM reporting system.

Navigational path: Project Costing>General Information Panel.

Search for the project. The screen will refresh to the general information page. Go to **User Fields** Tab

CALS Acc. No: This field will primarily be used by Madison College of Agricultural Life & Sciences. This field is not limited exclusively for CALS use.

Predecessor: This field will primarily be used by Extension to capture the predecessor project to the project created.

Successor: This field will primarily be used by Extension to capture the successor project to the project created. This field will not be limited exclusively for Extension use.

Parent: This will primarily be used by UWSA Trust funds to indicate what the parent project is to the created project. This field will not be limited exclusively for Trust Fund use.

Principal/Income: This field will be used by UWSA Trust funds also to indicate the principal or income project for those projects that have a relationship (one to one). This field will not be limited exclusively for Trust Fund use.

B. Complete “BOLT-ON” for Regent Reporting and other reporting.

All sponsored awards, gifts and gifts in kind received by the University are Board of Regent reportable events. Completion of the bolt on panel is REQUIRED for receipts of any awards, contracts, financial gifts or gifts in kind. Data entered into the bolt- on panels will be extracted by the UWSA office to complete monthly and annual Board of Regent reports, A-133 audit reports, and to meet other system and campus reporting needs.

Sponsored projects award information (for those campuses NOT using Grants) must be entered in the bolt-on. These projects were previously entered in ESIS to provide means for UWSA to extract data for Regent, A-133 and other reporting. Those campuses **NOT** using the Grants Module will use the *Project Lite Bolt-on* to enter this data. Those campuses not using Project Lite or the Grants module will continue to submit their information on projects/grants using their current method.

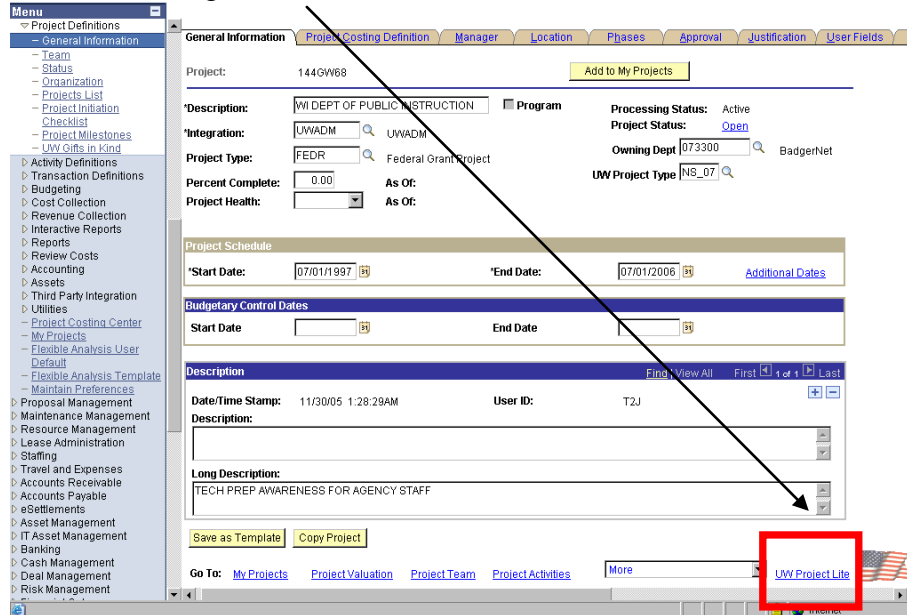
1. Definition: Sponsored vs. Non-sponsored Project

- **Sponsored:** A project created where the source of funds are committed from an external entity whom the University **has** a relationship with beyond the initial receipt of the funding. This ongoing relationship usually takes the form of billing/LOC draws and reporting requirements (both technical and financial). Facilities and Administrative (F&A) overhead costs are typically charged. These projects have *terms and conditions* associated with them. A sponsored project usually is in the form of a *grant, contract, or cooperative agreement*. In certain circumstances, internally funded projects may be treated like a sponsored project because of the imposed terms, conditions, or other reporting requirements (e.g. fund 101 projects created by the UW-Madison Graduate School)
- **Non-Sponsored:** A project with the source of funds from an internal entity such as State, departmental, or institutional funds (e.g. returned F&A funds). These projects generally do not have billing or reporting requirements, nor is F&A charged. Gift projects are generally considered a non sponsored project. Examples of these types of projects include startup/retention packages for faculty, equipment purchases, and special earmarked programs. Non-sponsored projects may be funded by multiple internal sources.

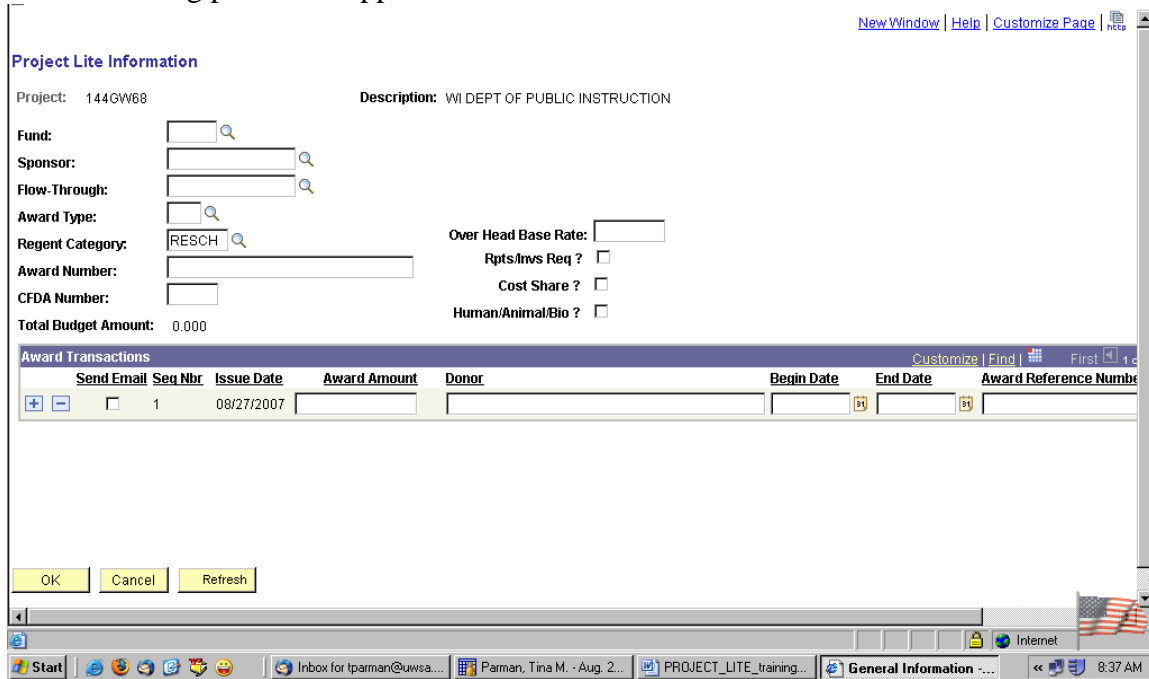
2. Sponsored Projects and Gift projects set up will require the completion of the bolt-on page. Users may access the bolt on panel through navigation through the Project Costing panel.

3. Users should complete the General Information page in Project Costing. After the project number is assigned, the user can click on the following link to access the Project Lite panel:

[UW Project Lite](#) (bottom right)



4. The following panel will appear:



NOTE: If you do not check the Send Email (for regent notification) you will get a warning message. You have one more chance to check this checkbox. If you don't and you wanted a regent notice sent, you will need to enter a negative award amount (don't check checkbox) and another positive award amount (check the checkbox).

5. Complete all relevant and appropriate fields, as described below.

Fields in Bolt-on

Field	Description	Data Entry Instructions														
Fund	The fund that has been assigned to this award.	Enter fund OR Select fund from drop down (must be valid fund). 144 = federal 233 = gift 133 = non-fed grant/contract														
Sponsor	Can be Donor's name for large \$ amt Usually entity from which funds were received. Must be set up in Grants Module (Contact Madison or Extension to add)	Click the magnifying glass to search for sponsor (easiest is to search by name) If the sponsor is not listed and you want this sponsor added to the database, please See Appendix B for the form to fill out to accommodate this request. UWCOL will converse with UWEXT for Sponsor Set up														
Flow-through Non Direct	Only fill out if Non Direct – Identified Federal funds awards to the UW through a non-federal agency acting as prime contractor (If flow-through, then Federal Agency is the "Sponsor" and Non-Federal Agency in which you directly receive the funds from is the "Flow-through Non Direct"	Click the magnifying glass to search for sponsor (easiest is to search by name).														
Award Type	Funding instrument used to make the award.	Select from drop down list: <table border="1" style="width: 100%;"> <thead> <tr> <th>PS Award Type</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>GRT</td> <td>Grant</td> </tr> <tr> <td>GFK</td> <td>Gift</td> </tr> <tr> <td>CRC</td> <td>Cost-Reimbursable Contract</td> </tr> <tr> <td>FPC</td> <td>Fixed Price Contract</td> </tr> <tr> <td>COP</td> <td>Cooperative Agreement</td> </tr> <tr> <td>CTA</td> <td>Clinical Trial</td> </tr> </tbody> </table>	PS Award Type	Description	GRT	Grant	GFK	Gift	CRC	Cost-Reimbursable Contract	FPC	Fixed Price Contract	COP	Cooperative Agreement	CTA	Clinical Trial
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GFK	Gift															
CRC	Cost-Reimbursable Contract															
FPC	Fixed Price Contract															
COP	Cooperative Agreement															
CTA	Clinical Trial															
Regent Category	These categories are used to group awards in a specific order for reports to the Regents .	Select from drop down list. <table border="1" style="width: 100%;"> <thead> <tr> <th>PS Purpose</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>STUD</td> <td>Student Aid</td> </tr> <tr> <td>MISC</td> <td>Miscellaneous</td> </tr> <tr> <td>PHYP</td> <td>Physical Plant</td> </tr> <tr> <td>LIBRY</td> <td>Libraries</td> </tr> </tbody> </table>	PS Purpose	Description	STUD	Student Aid	MISC	Miscellaneous	PHYP	Physical Plant	LIBRY	Libraries				
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		PUBSV RESCH INSTR	Public Service Research Research Instruction																
Award Number	Number assigned to a project by the granting agency – not all records will have award numbers.	If no award number nor CFDA number, enter award date. This is <i>a required field</i> .																	
CFDA Number	Catalog of Federal Domestic Assistance Number	Format: xx.xxxx																	
Total Budget Amount	Display only showing total inception to date award amounts.	<i>DISPLAY ONLY</i>																	
F & A Base:	Enter the F & A base if applicable. Madison, Milwaukee and Extension campuses do not need to complete this information.	Format is XXXX <table border="1"> <thead> <tr> <th>FA Base ID</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>MTDC</td> <td>Modified Total Direct Cost (G)</td> </tr> <tr> <td>NIHTR</td> <td>NIH Training (Base D)</td> </tr> <tr> <td>NONE</td> <td>No F&A (Base A)</td> </tr> <tr> <td>REU</td> <td>NSF Resrch Exper for Undergrad</td> </tr> <tr> <td>SW</td> <td>Salaries and Wages (Base B)</td> </tr> <tr> <td>SWF</td> <td>Salaries Wages and Fringes (F)</td> </tr> <tr> <td>TDC</td> <td>Total Direct Costs (Base C)</td> </tr> </tbody> </table>		FA Base ID	Description	MTDC	Modified Total Direct Cost (G)	NIHTR	NIH Training (Base D)	NONE	No F&A (Base A)	REU	NSF Resrch Exper for Undergrad	SW	Salaries and Wages (Base B)	SWF	Salaries Wages and Fringes (F)	TDC	Total Direct Costs (Base C)
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SW	Salaries and Wages (Base B)																		
SWF	Salaries Wages and Fringes (F)																		
TDC	Total Direct Costs (Base C)																		
F & A Rate	Enter the F & A rate if applicable. Madison, Milwaukee and Extension campuses do not need to enter this information.	Format is XXX.X Percent																	
Rpts/Invs Req?	Check if Reports or Invoices are required.																		
Cost Share?	Check if Cost Share is applicable.																		
Human/Animal/Bio?	Check if Human/Animal or Bio involved then complete Human/Animal/Bio Details.	When the user clicks on this checkbox, another section will appear on the panel .																	
Human/Animal/Bio Details																			
Certification Code	Defines the type of research protocol certification. (ex. ANIMA, HUMAN, BIOHAZ)	Select from drop down list.																	

		Certification Code Description
		ANIM1 Animal Welfare Approval 1
		ANIM2 Animal Welfare Approval 2
		ANIM3 Animal Welfare Approval 3
		ANIM4 Animal Welfare Approval 4
		ANIM5 Animal Welfare Approval 5
		ANIM6 Animal Welfare Approval 6
		ANIM7 Animal Welfare Approval 7
		ANIM8 Animal Welfare Approval 8
		ANIM9 Animal Welfare Approval 9
		BIOS1 Biological Safety Approval 1
		BIOS2 Biological Safety Approval 2
		BIOS3 Biological Safety Approval 3
		BIOS4 Biological Safety Approval 4
		BIOS5 Biological Safety Approval 5
		HUM10 Human Subjects Approval 10
		HUM11 Human Subjects Approval 11
		HUM12 Human Subjects Approval 12
		HUM13 Human Subjects Approval 13
		HUM14 Human Subjects Approval 14
		HUM15 Human Subjects Approval 15
		HUMN1 Human Subjects Approval 1
		HUMN2 Human Subjects Approval 2
		HUMN3 Human Subjects Approval 3
		HUMN4 Human Subjects Approval 4
		HUMN5 Humn Subjects Approval 5
		HUMN6 Human Subjects Approval 6
		HUMN7 Human Subjects Approval 7
		HUMN8 Human Subjects Approval 8
		HUMN9 Human Subjects Approval 9
		MISCD <u>Misconduct</u>
Approval Date	Indicates when the protocol was approved.	
Expiration Date	Indicates when the protocol will expire.	
Assurance Number	The protocol number.	
Award Amount Screen Field	Description	
Issue Date	For purposes of Regent Reporting this will default with current date.	Current date, no need to complete.
Send email	Check this to send Regent Notification to PI and any other email noted on Team Detail page.	<i>MUST CHECK TO SEND REGENT NOTICE</i>
Award Amount	Award initial amount/increases or decreases to award.	
Donor	Name of Donor – If Multiple Donors is the Sponsor, this must be completed.	Free Form Field
Begin Date	The beginning date of funding.	Optional
End Date	The end date of funding.	Optional

Award Reference Number	Optional – if a 5 year award the award reference number could be different from year to year.	Optional – if different than Award number in main bolt on section.
<p>Note: We intend to use system date for regent reporting date so as to ensure we capture all transactions. So the system date in essence is the Regent Date</p>		

C. Add Award Amounts using “BOLT-ON” for Regent Reporting and other reporting.

1. Navigation : Project Costing/Project Definitions/General Information
2. Use the “Find an Existing Value” Tab. Search or enter the Project the user would like to update.

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

Find an Existing Value | **Add a New Value**

Business Unit: [UWADM] [Search]

Project: [begins with] [PRJ] [Search]

Description: [begins with] []

Program: [Detail Project]

Processing Status: []

Include History Correct History Case Sensitive

[Search] [Clear] [Basic Search] [Save Search Criteria]

[Find an Existing Value](#) | [Add a New Value](#)

3. Select the appropriate project to update.

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

Find an Existing Value | **Add a New Value**

Business Unit: [UWADM] [Search]

Project: [begins with] [PRJ] [Search]

Description: [begins with] []

Program: [Detail Project]

Processing Status: []

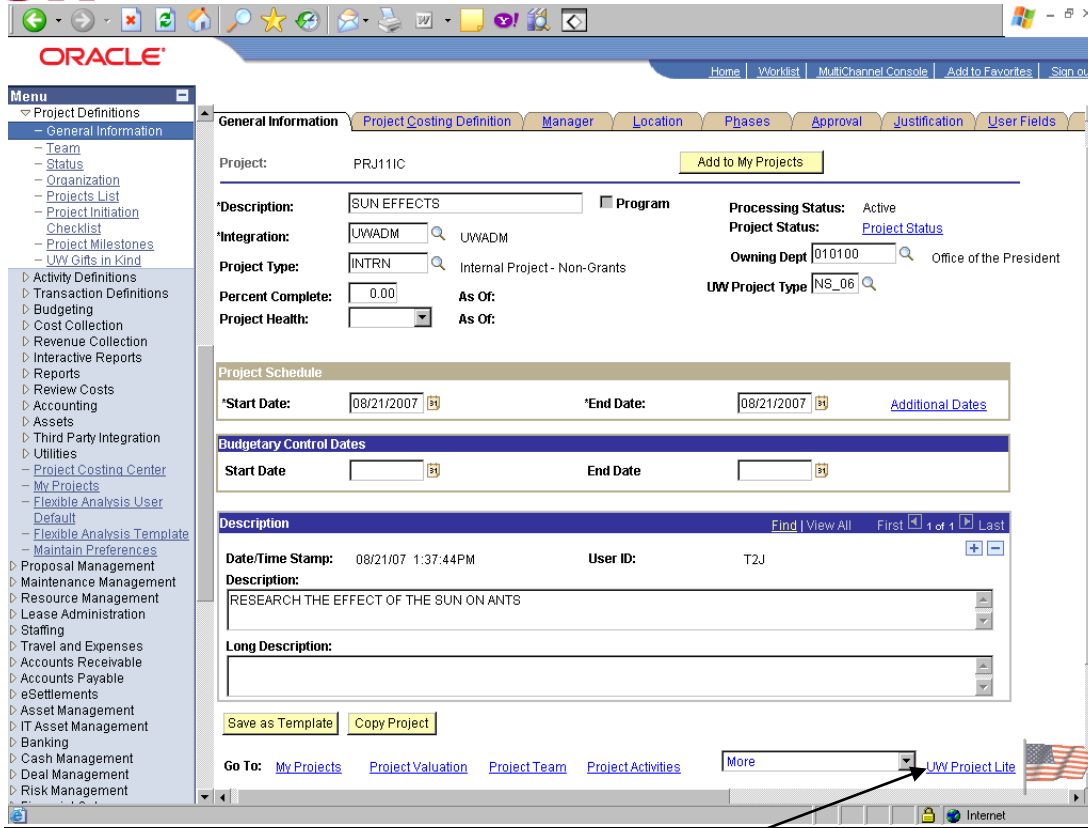
Include History Correct History Case Sensitive

[Search] [Clear] [Basic Search] [Save Search Criteria]

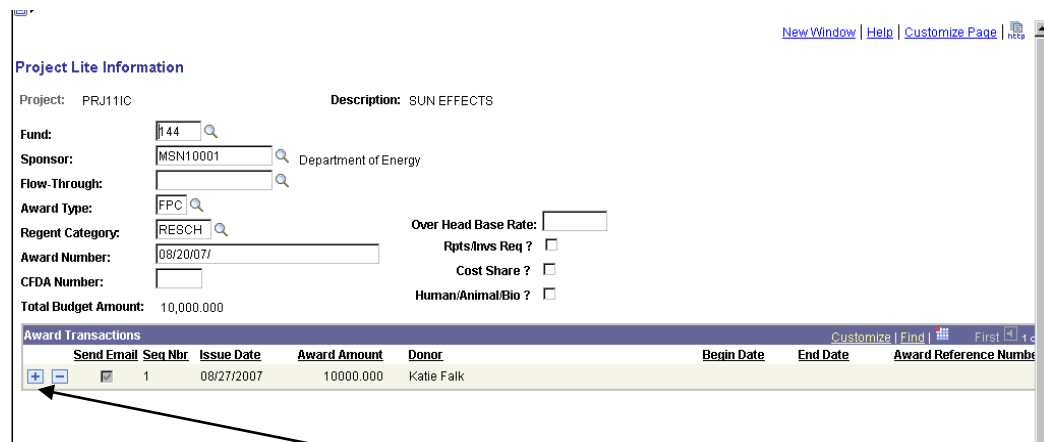
Search Results
View All | First | 1-6 of 6 | Last

Business Unit	Project	Description	Project Type	Processing Status
UWADM	PRJ11AP	Test Entry of Project	GIFT	Active
UWADM	PRJ11AQ	Cow tipping experiment	GIFT	Active
UWADM	PRJ11OL	Test Project	INTRN	Active
UWADM	PRJ11HQ	Testing Bolt On	FEDR	Active
UWADM	PRJ11HX	Cat tail nutrition project	INTRN	Active
UWADM	PRJ11IC	SUN EFFECTS	INTRN	Active

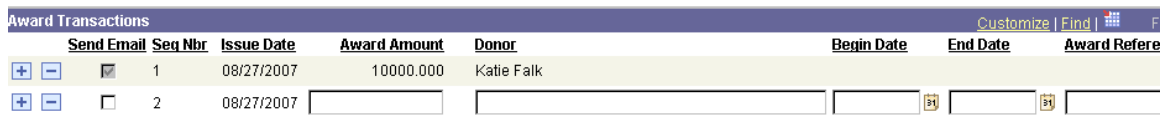
[Find an Existing Value](#) | [Add a New Value](#)



4. Click on the UW Project Lite hyperlink located in the lower right corner.



5. On this panel, the user will want to click the “+” sign in the Award Transactions Section. This will open up another line to add additional award transactions information.



7. The user will need to complete additional lines for changes made on the award.

Award Amount Screen Field	Description	What is supposed to be in this field?
Issue Date	For purposes of Regent Reporting this will default to the current date.	Current date, no need to complete.
Send email	Check this box to send Regent Notification to PI and other email addressed provided on Team Detail page.	<i>MUST CHECK TO SEND REGENT NOTICE.</i>
Award Amount	Award initial amount/increases or decreases to award.	
Donor	Name of Donor – If Multiple Donors is the Sponsor, this must be completed.	Free Form Field
Begin Date	The beginning date of funding.	Optional
End Date	The end date of funding.	Optional
Award Reference Number	Optional – if a 5 year award the award reference number could be different from year to year.	Optional – if different than Award number in main bolt on section.
<p>Note: We intend to use system date for regent reporting date so as to ensure we capture all transactions. So the system date in essence is the Regent Date</p>		

D. Project Status

Navigational path: Project Costing>Project Definitions>General Information

General Information | Project Costing Definition | Manager | Location | Phases | Approval | Justification

Project: 133AX83 Add to My Projects

*Description: UNIVERSITY OF WISCONSIN FOUNDA Program Processing Status: Active
Project Status: [Open](#)

*Integration: UWADM UWADM Owning Dept:

Project Type: 00000 UW Project Type:

Percent Complete: 0.00 As Of:

Project Health: As Of:

Click on the Project Status

The following screen will appear and it will be grayed out as well.

Status

Project: 133AX83 Description: UNIVERSITY OF WISCONSIN FOUNDA

Project Status Find | View All First 1 of 1 Last

Effective Date: 01/01/1900 Sequence: 0 + -

*Status: 0

Priority: 0

Interest Calculation Factor: 0.0

Comments:

Save Return to Search Notify Refresh Update/Display Include History

Click on the plus sign to add an effective dated row to change the status
A new effective dated row will be added and this is where changes can be made.

Status

Project: 133AX83 Description: UNIVERSITY OF WISCONSIN FOUNDA

Project Status Find | View All First 1 of 2 Last

Effective Date: 10/03/2007 Sequence: 0 + -

*Status: 0 Open

Priority: 0

Interest Calculation Factor: 0.0

Comments:

The effective date will default to the current date. Change as you desire.
 You have many options for status:

Project Status	Status Description
A	Closed - Archived
C	Closed
E	Ended - Past Official End Date
H	Hold - Reject all transactions
J	Closed - Adjustments only
O	Open

For most campuses, you will render a project inactive by choosing the C – Closed or A – Closed-Archived.

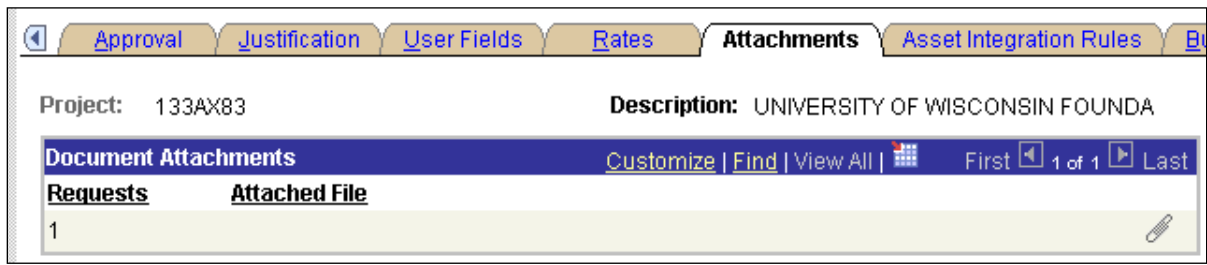
Make a selection and  the page.

See Appendix D for Project Status Type Reference Chart.

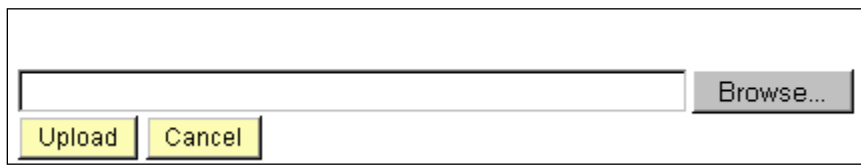
E. Attachments

Navigational path: Project Costing>Project Definitions>General Information

Choose the Attachments Panel



Click on the paper clip and choose a file to download (browse)



Click Upload after you choose the file.

Then click the SAVE button on the Attachment screen to save your attachment.

F. Gifts in Kind

Gifts-in-kind received from all sources; including private donors, foundations, corporations, etc., require the recipient of each gift-in-kind to route the item through their institutional review process for approval (including a review for hazardous materials) as part of the Regent reporting process.

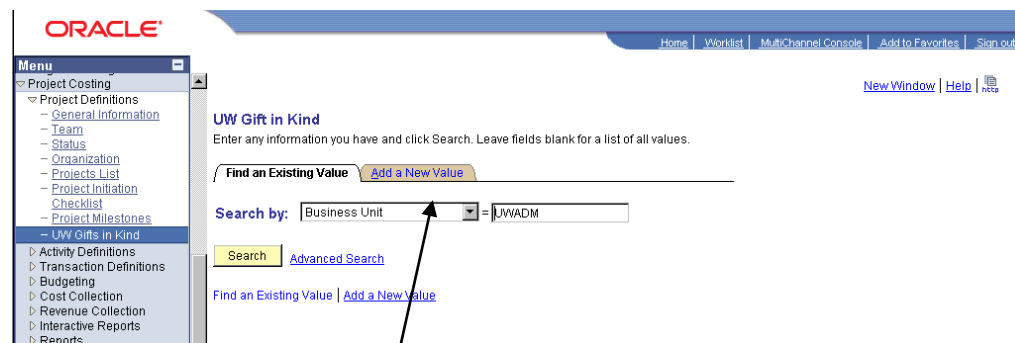
In accordance with s. 20.907, Wis. Stats., each institution will provide a listing and a summary report of gifts-in-kind receiving institutional approval to the Vice President for Finance after the close of the fiscal year, by September 1. The Vice President will provide a summary report to the Regents at their subsequent October meeting and a combined listing to the Legislative Joint Finance Committee and the Department of Administration by December 1st.

By Board policy, the University may not participate in establishing the monetary value of the gift, nor should any value be assigned when the institutions submit the annual gift-in-kind report.

An inventory value should be established based upon fair market value on the date of the gift for financial reporting purposes. If this value is \$5,000 or more and the useful life is one or more years, the donated item shall be included in the capital inventory. An insurance value should be determined in accordance with procedures established by the System Administration Risk Management office.

All campuses may use the PeopleSoft Functionality to capture Gift In Kind data.

1. Navigation: Project Costing/Project Definitions/UW Gifts in Kind



2. Click on ["Add a New Value"](#)

UW Gift in Kind

[Find an Existing Value](#)

[Add a New Value](#)

Business Unit:

UW Gift in Kind Id:

[Find an Existing Value](#) | [Add a New Value](#)

3. Click on the **Add** button

The screenshot shows the Oracle Financial System interface for 'UW Gifts in Kind'. The left sidebar contains a menu with various project and financial management options. The main form area is titled 'UW GIFTS IN KIND' and contains the following fields and controls:

- Business Unit:** UWADM
- UW Gift in Kind Id:** NEXT
- Issue Date:** 08/27/2007
- Principal Investigator:** Searchable text field
- *Department Code:** Searchable text field
- *UW Gift in Kind Donor Name:** Text field
- Donor Address City/State:** Text field with a search icon
- *Gift in Kind Description:** Large text area with a scroll bar
- Send Email Notification:** Check box
- Email ID:** Text field

At the bottom of the form, there are three buttons: 'Save', 'Add', and 'Update/Display'.

Gifts In Kind	Description
Business Unit	The user's business unit will be populated automatically. (This is based upon set up of security, based upon user profiles.)
Gift in Kind ID	This will be auto numbered with the exception of the Gifts in Kind that get converted from ESNT.
Issue Date	Will default to current date.
Principal Investigator	Employee who should be notified of gift in kind.
Department Code	Department accepting the gift in kind.
UW Gift In Kind Donor Name	Donor Name.
Donor Address City/State	Donor City and State.
Gift in Kind Description	Description of Gift in Kind.
Send Email Notification	In addition to person who should be notified of gift in kind, anyone else who should be notified
Email ID	Email address of additional person to be notified.

Appendix A UW Project Type Conversion

Sponsored Descriptions	ESIS Project Types mapped into this Type	Conver to Non Sponsored – Description
GM_05 Employee Interchange Agreement	05	NS_06 General/Miscellaneous
GM_06 Named Professorships	06	NS_15 Professorships
GM_10 Research	03, 07, 08, 09,10, 21	NS-16 Research
GM_11 Doctoral Dissertation Research	11	NS-16 Research
GM_12 Research Career Award	12	NS-16 Research
GM_20 Research Training Program	20	NS_04 Education/Training
GM_25 Instruction-Training-General	22, 23, 24, 25, 26, 27, 28, 29, 63*, 73	NS_04 Education/Training
GM_30 Fellowship-Predoctoral	30	NS_09 Fellowships
GM_31 Fellowship-Postdoctoral	31	NS_09 Fellowships
GM_39 Fellowship-Miscellaneous	G2, G3, G6, 32, 33, 36, 37, 38, 39	NS_09 Fellowships
GM_40 Construction-Remodeling-Renovations	40, 41	NS_03 Buildings and Grounds
GM_44 Exhibits, Lectures, Performances	44, 53	NS_11 Conference/Workshops
GM_45 Miscellaneous	01, 02, 04, 45, 51, 62, 85, 91, 92, 95, 97	NS_06 General/Miscellaneous
GM_49 Patient Care (Clinical Trials)	49	NS_05 Patient Care
GM_50 Equipment	50	NS_06 General/Miscellaneous
GM_60 Scholarships	35, 60	NS_10 Scholarships
GM_68 Work-Study	68	NS_06 General/Miscellaneous
GM_70 Curriculum Improvement and Development	70	NS_04 Education/Training
GM_71 Libraries, Books, Journals	71, 72	NS_08 Library
GM_74 Travel	74	NS_13 Travel
GM_90 Conference, Workshop, Symposium	90	NS_11 Conference/Workshops
GM_98 Public Service/Outreach	52, 61, 98	NS_12 Public Service/Outreach
GM_99 Financial Aid	99	N/A

For Grants and other campuses sponsored projects (other than MIL, EXT, MSN) the project types will be converted as shown above. middle column to left column. For Non – sponsored gifts, Not all categories have been defined. Conversion of projects will follow the logic of middle to right column. (This is ONLY for 133/233).

NOTE: Project Types starting with GS are for Graduate School only (Madison)

Appendix B Request to Add a Sponsor

Add/change sponsor to Peoplesoft Grants sponsor table request form

(Please complete each field, in printed format.)

Requesting campus information:

Campus requesting addition: _____ Business Unit name: _____

Campus contact name: _____

Campus contact phone number: _____

Reason for request: _____

(E.g. new sponsor, name change, etc)

Sponsor Information:

Sponsor name: _____

Sponsor address: _____

(Please include street address, city, state and zip code)

Sponsor tax id number: _____

Sponsor tax status: _____

(E.g. business, government agency, university, philanthropic organization, etc)

Sponsor contact name: _____

Sponsor contact title: _____

Sponsor contact phone number: _____

Sponsor fax number: _____

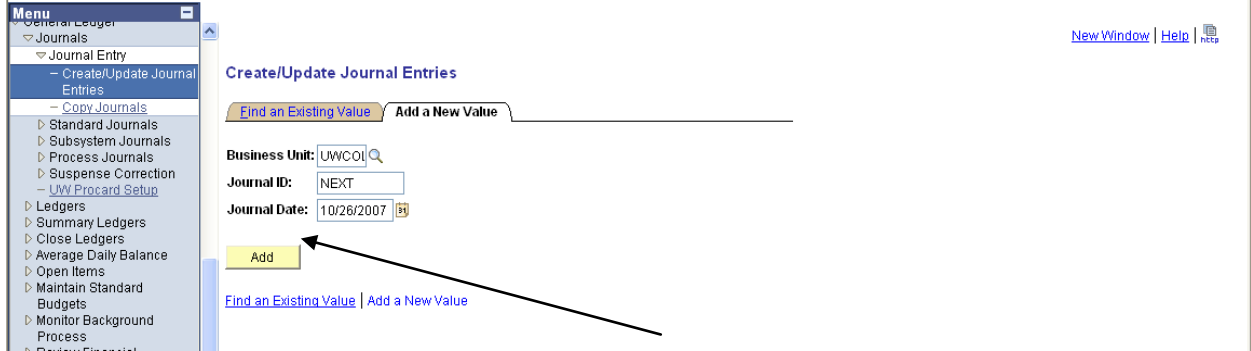
Additional information: _____

Please send request to RSP staff member Stephanie Gray at: sgray@rsp.wisc.edu or mail to: Research and Sponsored Programs, University of Wisconsin- Madison, 21 N Park St, Madison, WI 53715-1218 (Email requests are preferred.)

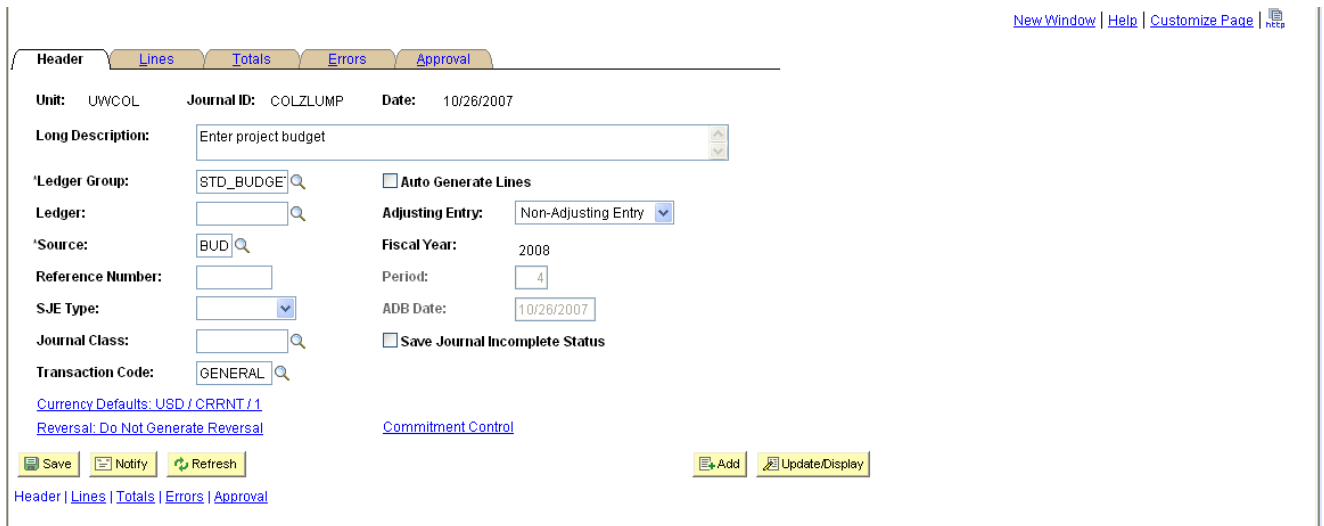
This form can also be completed on-line at <http://www.rsp.wisc.edu/sfs/AddSponsorInfo.cfm>

Appendix C Enter a Manual Budget Journal for Projects

Navigate to: General Ledger > Journals > Journal Entry > Create/Update Journal Entries



- 1) Enter your Journal ID according to your campus procedures
- 2) Change the date if necessary
- 3) Click the **ADD** button



- 4) Enter a Long Description
- 5) Type or select **STD_BUDGET** for the Ledger Group
- 6) Type or select **BUD** for the Source
- 7) Click on the **Lines** Tab

Header | Lines | Totals | Errors | Approval

Unit: UWCOL Journal ID: COLZLUMP Date: 10/26/2007 *Process: Edit Journal Process

Template List Search Criteria Change Values Inter/IntraUnit Line: 1

Select	Line	'Unit	'Ledger	SpeedType	Account	Fund	Dept	Program	Class	PC Bus Unit	Project	Activity
<input type="checkbox"/>	1	UWCOL	STD_BUDGET		ZLUMP	133	989800	0		UWCOL	PRJ11CZ	

Lines to add: 1 + -

Unit	Total Lines	Total Debits	Total Credits	Journal Status
UWCOL	1	5,000.00	0.00	N

Save Notify Refresh

Header | Lines | Totals | Errors | Approval

Journal Process

1

Program	Class	PC Bus Unit	Project	Activity	An Type	Scenario	Base Currency	Base Amount	Reference	Journal Line Description
0		UWCOL	PRJ11CZ			PROJ_B	USD	5,000.00		Lump Sum Budgets-prjbu

Total Credits	Journal Status
0.00	N

Add Update/Display

- 8) Enter the appropriate chartfields
- Account = **ZLUMP** (if you are not splitting it to various categories)
 - Fund
 - Department
 - Program
 - PC Bus Unit = your campus SETID
 - Project
 - Activity may default in if you are using the grants module (leave blank for everyone else)
 - Scenario = **PROJ_BUDGET**
 - Base Amount = amount that was previously entered into the award amount on the Project Lite Bolt-On
 - Click the **Save** button
 - Click the **Process** button to **Edit** the Journal (Journal Status must change to V for valid)

Header | Lines | Totals | Errors | Approval

Unit: UWCOL Journal ID: COLZLUMP Date: 10/26/2007 'Process: Edit Journal Process

Template List Search Criteria Change Values Inter/IntraUnit Errors Only Line: 10

Select	Line	Unit	Ledger	SpeedType	Account	Fund	Dept	Program	Class	PC Bus Unit	Project	Activity
<input type="checkbox"/>	1	UWCOL	STD_BUDGET		ZLUMP	133	989800	0		UWCOL	PRJ11CZ	

Lines to add: 1

Unit	Total Lines	Total Debits	Total Credits	Journal Status
UWCOL	1	5,000.00	0.00	Y

Save Return to Search Previous in List Next in List Notify Refresh

Header | Lines | Totals | Errors | Approval

- 9) Change the **Process** to Post Journal
- 10) Click the **Process** button. (Journal Status will change to P for posted)
- 11) When you get the following message, click the **OK** button.

Are you sure that you want to post this journal? (5010,45)

OK Cancel

Header | Lines | Totals | Errors | Approval

Unit: UWCOL Journal ID: COLZLUMP Date: 10/26/2007 'Process: Edit Journal Process

Template List Search Criteria Errors Only Line: 10

Select	Line	Unit	Ledger	SpeedType	Account	Fund	Dept	Program	Class	PC Bus Unit	Project	Activity
<input type="checkbox"/>	1	UWCOL	STD_BUDGET		ZLUMP	133	989800	0		UWCOL	PRJ11CZ	

Lines to add: 1

Unit	Total Lines	Total Debits	Total Credits	Journal Status
UWCOL	1	5,000.00	0.00	P

Save Return to Search Previous in List Next in List Notify Refresh

Header | Lines | Totals | Errors | Approval

- 12) The budget journal will display in WISDM for the project.

Appendix D

Project Status Types Reference Chart

Project Status Value*	Project Status Descr*	Description	Project Status Control			Contracts	
			Effective Status ("Processing Status")	Analysis Types	Control Action	Contract Status	Contract Processing Status
O	Open	Status is to inform users the project is within the performance period.	ACTIVE	None specified	None specified	Pending/Active	ACTIVE
H	Hold - Reject All Transactions	Status will be manually entered when a project is within the performance period, but transactions must be stopped due to legal, contractual, or any other unforeseen circumstances. RSP will notify the PI/Department of this kind of status change	ACTIVE	All Types	Reject	Active (with Hold checkbox selected)	ACTIVE
E	Ended - Past Official End Date	Intended to stop new commitments and inform users that the project has ended.	ACTIVE	ACT GLE COM BUD CBU	Warning Warning Reject Warning Warning	Active	ACTIVE
J	Closed-Adjust	Status will be manually entered during project close-out to make correcting journal entries (Overhead adjustments, DREV entries, Budget adjustments), but not allow new costs.	ACTIVE	ACT COM REQ	Reject Reject Reject	Active or Closed	ACTIVE or CLOSED
C	Closed	Status will be manually entered and used after the project has ended and the final reports have been sent to the sponsor. This also means the project is still auditable and still within the record retention period.	ACTIVE	ACT GLE COM BUD CBU	Reject Reject Reject Warning Warning	Closed	CLOSED

A	Closed - Archive	TBD if this status will be done manually or have it automated somehow. This will be used after the project has been determined outside the record retention period.	INACTIVE	None specified (all will be rejected by Inactive effective status.)	Reject	Closed	CLOSED
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*Values are as configured in PROJ_STATUS_TBL

*Values are configured under the SHARE setid and apply to all Business Units.

Analysis Type

Values:

- ACT Actual (AP Voucher or EX Expense Document)
- BUD Budget entry
- CBU Cost Share Budget (not used at UW)
- COM Commitment (PO Encumbrance)
- GLE GL Expense, not from AP or EX
- REQ Requisition