

UW System Shared Financial System (SFS)



# **Project Lite Training Manual**

**PeopleSoft Version 9.2** 

Version 1.5 - October 2020

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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 are Madison, Milwaukee, Stevens Point, and System Administration. In addition, the Grants module will not be tracking non-sponsored projects for Madison, Milwaukee, Stevens Point or System (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, Stevens Point, and System 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 WISER 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 the Peoplesoft 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

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

General Inf	ormation		
<u>F</u> ind an Ex	isting Value	Add a New	Value
Business Unit Project	UWSYS Q NEXT		
Create	Blank Project	:	~

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 System user will automatically be assigned a business unit of UWSYS.)

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

General Information	Project Costing	Definition	Prima <u>v</u> era	anager	Location	P <u>h</u> ases App	proval <u>J</u> ustification	u <u>U</u> ser Field	s >	
	Project	NEXT					Add to My Pro	ojects		
	*Description		2			Program	Processing St	atus Active	9	
	Project Type		Q				Fioject St	ilus U	Oper	n
Pe	rcent Complete Project Health	0.00	As Of							
							Owning UW Project	J Dept	Q	
roject Schedule 🕖										
*Start D	ate 10/12/2020	Ē				*End Dat	e 10/12/2020 🗰	Additional Date	S	
udgetary Control Date	es) Date	<b></b>				End Dat	e 🛄			
escription						Q	, I II II II	f1 • 🕨 🕨	View All	
Date/Time Star	np 10/12/20 12:0	00:00PM		User ID	00857570					
									4	
54 characters remaining ong Description:										
									4	
Save as Template			Copy Project							UW Project Lite UW Project Edits
Save Refresh							Add Upda	te/Display	Include Histor	v Correct Hist



#### 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 cannot exceed 56 characters.

**Integration**: Type in the user's Business Unit. (Ex. UWSYS, UWMSN, etc) (This field is a REQUIRED FIELD).

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

Project Type	Description
FEDR	Federal Grant Project
GIFT	Gift or Donation - Non-Grants
INTRN	Internal Project - Non-Grants
PRIV	Private Grant Project
QET	Quasi Endowment Trust
SHARE	Shared Grants Project
STATE	State 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**

Team	[eam Detail						
s	Project AAI3429 Start Date 10/12/2020	Descript End D	ion Project Lit late 10/12/202	te Manual 9.2 0	Processing	g Status Active	
roject Team M	lembers				K		View All
EmplID	Name	Project Role	Project Manager	Email Notify	Start Date	End Date	
Team Member							+ -
Add Members	Code Default Project	Role Add Team I	Members	Jot	b Code	Using Job Code	ove Team Members
A	dd Team Member	Save as	Template	Import from 1	<b>F</b> emplate		
Go To: eturn to General	Team Rates Information	lefresh					

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

434771 IVIMT111MF					0    d   1 of 1	N N I View
						View
	Project AAI3	429	Description	Project Lite Manual 9.2		+
Sta	art Date 10/1	2/2020	End Date	10/12/2020	Processing Status	Active
*F			0		5	
-			~	Name		
	Email ID			Email Notify for S	tatus Change	
escription						
					C	
					.1	
vailability dat	es					
≣, Q					<ul> <li>1-1 of 1 </li> </ul>	View All
Schedule	*Projec	t Role	Project Manager	*Start Date	*End Date	
1		Q		10/12/2020	10/12/2020	+ -
ctivity Team					1-1 of 1	View All
activity Team IIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIII						
Activity Team		Description		Start Date	End Date	
Activity Team		Description		Start Date	End Date	

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.

	Loc	ok Up Emp	loyee ID	×
				Help
Business Unit	UWSY	S		
Employee ID	begins with ~			
Full Name	begins with ~			
Department ID	begins with ~			
Department	begins with ~			
Search Results	Clear Cancel E	asic Lookup		
Only the first 300	results can be displayed.			
View 100			◀ ◀ 1-300 of 300 ∨	
Full Name		Department ID	Department	Employee ID
LAMPE, GREGO	RY P	602000	UWSS Human Resources	00002758
VANDEZANDE,C	ARLEEN M	201500	Acad Programs & Faculty Advan	00003531

- 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 Search button. Proper spelling of the employee's name is essential 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. Email Notify for Status Change Check to include email addresses entered in Email ID field on Regent Notices. Note: PI will automatically receive Regent Notice when Send Email is checked in Project Lite Award Transaction section.
- 11. **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

	eam Detail					
Team Member					Q	I I€ € 1 of 1 ∨ ►
	Project AA	13429	Description	Project Lit	e Manual 9 2	
St	art Date 10/	/12/2020	End Date	10/12/202	0	Processing Status Active
*E	mployee ID	00857570	Q	Nam	e ANDERSOI	N,KIRK
	Email ID	kanderson@uwsa.edu		🗹 Email	Notify for Stat	us Change
Description						
						시
Schedule	*Proje	ct Role	Project Manager	*Start Dat	e	*End Date
1	PI	Q		10/12/202	.0 🗰	10/12/2020
Activity Team		Description			Start Date	Find Date

- 12. Click on the **Save** Button.
- 13. Click on the Return to Project Team Summary hyperlink.
- 14. On the next screen click on the Return to General Information hyperlink.

	Projec Start Dat	et AAI3429 e 10/12/2020	Description P End Date 1	roject Lite Manua 0/12/2020	19.2	Processing Sta	tus Active	
roject Tean	n Member	S					1 1 - 5 1	N. J. Manu All
EmpliD	Name		Project Role	Project Manager	Email Notify	Start Date	End Date	
00857570	ANDEF	RSON, KIRK						+ -
Job Code	ers Using Q	Job Code Default Project Role Q	Add Team Membe	rs	Job Co	de Q	ng Job Code Remov	e Team Members
			Save as Templ	ate	ort from Tem	nlate		



15. 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 the WISER reporting system.

Navigational path: Project Costing>General Information Panel.

Search for the project. From the General Information page, click on the User Fields tab.

General Information	Project Costing Definition	Primavera	Manager Location	Phases	<u>A</u> pproval <u>J</u> usti	ification Use	r Fields	>
Project AAI34	129	Description	Project Lite Manual 9.2					
User Fields								
CALS Acc. No.			User Currency	Q	]			
Predecessor			Amount 1					
Successor			Amount 2					
Parent			Amount 3					
Principal/Income			Date 1		]			
			Date 2					
Save as Templa	te	Copy Proje	ct					
My Projects	Project Valuation	Project Team	n Project Acti	vities	Go To	More		~
Save Return to	Search Previous in List	t Next in Li	st Refresh	Add	pdate/Display	Include History	Corre	ct History

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

**Predecessor:** This field is used to capture the predecessor project to the project created. **Successor:** This field is used to capture the successor project to the project created. **Parent:** This is 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 is primarily used by UWSA Trust funds 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

- <u>Sponsored</u>: A project created where the source of funds is 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)
- <u>Non-Sponsored:</u> 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:

General Information         Project Costing Definition         Primavera         Manager         Location	Phases Approval Justification User Fields
Project AAl3429	Add to My Projects
*Description     Project Like Manual 9.2     Project Like Manual 9.2       *Integration     UWSYS     Q     UWSYS Integration Template       Project Type     GiFT     Q     Gif or Donation - Non-Grants       Percent Complete     0.00     As Of       Project Health     ¥ As Of	Owning Dept 400900 Q Shared Financial System
Project Schedule ③ *Start Date 10/12/2020	"End Date 10/12/2020 🔝 Additional Dates
Start Date	End Date
Description	Q    4 4 1 of 1 > > >  4 View All
Date/Time Stamp 10/12/20 12:00:00PM User ID 00857570 Description: 254 characters remaining Law Description:	+ -
Save as Template Copy Project	UW Project Lite UW Project Edits
My Projects         Project Valuation         Project Team           Save         Return to Search         Previous in List         Next in List         Refresh	Project Activities Go To More  Add Update/Display Include History Correct History

4. The following panel will appear:

	Project Lite Information									
Project AAI3429 Description Project Lite Manual 9.2										
Fund:	Q									
Sponsor:	Q									
Flow-Through:	Q									
Award Type:	Q		F & A Base:							
Regent Category: RESCH Q F & A Rate %:										
Award Number:			Rpts/Invs Req ?:							
CEDA Number:			Cost Share ?:							
Total Budget Amount: 0.000			Human/Animal/Bio ?:							
Award Transactions										
≣; Q,										
Send Email S	eq Num Issue Date	Award Amount	Donor		Begin Date	End Date	Award Reference Number			
+	1 10/12/2020									
OK Cancel	Refresh									

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



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

Field	Description	Data Entry In	structions		
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 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.			
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	Select from dro	op down list:		
	make the award.	Award Type	Des	cription	
		CDA	Confidentialit	y Agreement	
		CRC	Cost-Reimbur	sable Contract	
		FPC	Fixed Price Co	ontract	
		GFT	Gift	Gift	
		GRT	Grant		
		LIA	License Agree	ement	
		MSR	Master Agreen	ment	
		NFA	Other Non-Fir	nancial Agreement	
		OTR	Other		
Regent Category	These categories are used to	Select from dro	op down list.	1	
	group awards in a specific	PS Purpose	Description	4	
	order for reports to the	INSTR	Instruction	4	
	Regents.	LIBRY	Libraries	4	
		MISC	Miscellaneous		
		РНҮР	Physical Plant		
		PUBSV	Public Service		
		RESCH	Research		
		STUD	Student Aid		

Award Number	Number assigned to a	If no award number nor CFDA number, enter		
	project by the granting	award date. This	is a required field.	
	agency – not all records will	-		
	have award numbers.	-		
CFDA Number	Catalog of Federal Domestic	Format: XX.XX	X	
	Assistance Number			
Total Budget Amount	Display only showing total	DISPLAY ONLY		
_	inception to date award			
	amounts.			
F & A Base:	Enter the F & A base if	Format is XXXX		
	applicable. Madison,	FA Base ID	Description	
	Milwaukee, Stevens Point,	MTDC	Modified Total Direct Cost (G)	
	and System institutions do not	NIFA	NIFA	
	need to complete this	NIHTR	NIH Training (Base D)	
	information.	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)	
			57.0/	
F & A Rate	Enter the F & A rate if	Format is XX.X2	X %	
	applicable. Madison,			
	Milwaukee, Stevens			
	Point, and System			
	institutions do not need			
	to complete this			
	information.			
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	When the user cl	icks on this checkbox, another	
	Bio involved then complete	section will appe	ar on the panel.	
	Human/Animal/Bio Details.			
Human/Animal/Bio Details				
Certification Code	Defines the type of research	Select from drop	down list.	
	protocol certification. (ex.			
	ANIMA, HUMAN,			
	BIOHAZ)			

		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
		BIOSA	Biological Safety Approval 4
		BIOSS	Biological Safety Approval 5
			Soo primary project for cort
			Human Embryonic Stor Coll 1
			Human Embryonic Stem Cell 2
		HESC2	Human Embryonic Stem Cell 2
		HESC3	Human Embryonic Stem Cell 3
		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	Human Subjects Approval 5
		HUMN6	Human Subjects Approval 6
		HUMN7	Human Subjects Approval 7
		HUMN8	Human Subjects Approval 8
		HUMN9	Human Subjects Approval 9
		MISCD	Misconduct
Approval Date	Indicates when the protocol		
Expiration Date	Indicates when the protocol		
Assurance Number	The protocol number.		
Award Amount Screen	Description		
Field	I		
Issue Date	For purposes of Regent Reporting this will default with current date.	Current date, no r	need to complete.
Send email	Check this to send Regent	MUST CHECK T	O SEND REGENT NOTICE
	other email noted on Team		
	Detail page.		



	1	
Award Amount	Award initial	
	amount/increases or	
	decreases to award.	
Donor	Name of Donor – If Multiple	Free Form Field
	Donors are the Sponsor; this	
	must be completed.	
Begin Date	The beginning date of	Optional
	funding.	
End Date	The end date of	Optional
	funding.	
Award Reference Number	Optional – if a 5-year award	Optional – if different than Award number in main bolt
	the award reference number	on section.
	could be different from year	
	to year.	
Note: We intend to use		
system date for regent		
reporting date to ensure we		
capture all transactions. So		
the system date in essence is		
the Regent Date.		

### 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.

Find an Existing Value         Add a New Value						
▼ Search Criteria						
Business Unit	= ~	UWSYS	Q			
Project	begins with ~	AAI3	Q			
Description	begins with 🗸		]			
Program	= ~	Detail Project	~			
Processing Status	= ~		~			
Grants Project	= ~		~			
Include History	Correct Histor	y          Case Sensitive				

3. Select the appropriate project to update.

Find an Existing Value         Add a New Value							
▼Search Crite	eria						
Business L	Jnit =	~	UWSYS	Q			
Proj	ject beg	ins with	AAI3	Q			
Descript	ion beg	ins with 🗸					
Progr	am =	~	Detail Project	~			
Processing Sta	tus =	~		~			
Grants Proj	ect =	~		~			
Include Histo	ory ⊡Co	orrect Histor	y □ Case Sensitive				
Search Clear Basic Search 🖉 Save Search Criteria							
View All 4 1-2 of 2 V M							
Business Unit	Project	Description	I	Project Type	Processing Status	Grants Project	
UWSYS	AAI3313		A TESTING ALLOCATION	FEDR	Active	(blank)	
UWSYS	AAI3429	Project Lite	Manual 9.2	GIFT	Active	(blank)	



General Information Project Cos	sting Definition Prima <u>v</u> era <u>M</u> anager <u>L</u> oo	ation Phases Approval	Justification	
Project	AAI3429		Add to My Projects	
*Description	Project Lite Manual 9.2	Program	Processing Status Active Project Status: Open	
Project Type	GIFT Q Gift or Donation - Non-Gran	its	•	
Percent Complete Project Health	0.00 As Of		Owning Dept 400900 Q	Shared Financial System
Project Schodule			UW Project Type NS_04 Q	
*Start Date 10/12/20	120 🗰	*End Date 10/12	Additional Dates	
Budgetary Control Dates				
Start Date		End Date	i	
Description		Q	1 of 1 v View	v All
Date/Time Stamp 10/12/20 Description:	12:00:00PM User ID 00857	570	+	-
254 characters remaining			یل اند.	<b>₽</b> _
Long Description:			الله الم بنا	P
Save as Template	Copy Project			UW Project Lite UW Project Edits
My Projects Pro	ject Valuation Project Team	Project	Activities Go T	o More ~
Save Return to Search F	Previous in List Next in List Refresh		Add Update/Display	Include History Correct History

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 insert another line to add additional award transactions information.

Awar	Award Transactions										
₽	町 Q										
	_	/		Send Email	Seq Num	Issue Date	Award Amount	Donor	Begin Date	End Date	Award Reference Number
+	T	-	-		1	10/12/2020	1000.000	FYF	10/12/2020	10/12/2020	54321
+		Ŀ	-		2	10/12/2020			<b>.</b>		

#### 6. 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.

#### UNIVERSITY OF WISCONSIN SYSTEM UWSCONSIN SYSTEM

Send email	Check this box to send Regent Notification to PI and other email addressed provided on Team Detail page.	MUST CHECK TO SEND REGENT NOTICE.
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.
Note: We intend to use system date for regent reporting date to ensure we capture all transactions. So the system date in essence is the Regent Date		



#### **D.** Project Status

1. Navigational path: Project Costing>Project Definitions>General Information

#### Click on the Project Status

General Information Project Co	sting Definition Primave	ra <u>M</u> anager <u>L</u> ocati	on P <u>h</u> ases	<u>Approval</u> <u>J</u> ustification	User Fields	>
Project	AAI3429			Add to My Project	cts	
*Description	Project Lite Manual 9.2		Program	Processing State	us Active	
*Integration	UWSYS Q	UWSYS Integration Template		Project Stat	tus: Open	
Project Type	GIFT Q	Gift or Donation - Non-Grants				
Percent Complete	0.00	As Of				
Project Health	~	\s Of		Owning Dep	400900	Q Shared Financial System
				UW Project Typ	NS_04 Q	

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

Status				
Project	AAI3429		Description Project	t Lite Manual 9.2
Project Status			Q    4 4	1 of 1 🗸 🕨 🕨 I View All
Effective Date	10/12/2020		Sequence 0	+
*Status	0	Open		
Priority	0			
Interest Calculation Factor	0.00			
Comments				
				ii.
Return to General Information				

2. 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.

#### UNIVERSITY OF WISCONSIN SYSTEM UW System Shared Financial System

Status							
Projec	et AAI3429	I	Description	Project Lite N	lanual 9.3	2	
Project Status			Q	1 0	f 2 🗸	• •	I View All
Effective Date *Status Priority Interest Calculation Factor Comments	10/12/2020 III O Q 0 0 0.00	S	equence	1			+ -
Return to General Information					.d		

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

Project Status	Status Description
А	Closed - Archived
С	Closed
E	Ended - Past Official End Date
Н	Hold - Reject all transactions
J	Closed - Adjustments only
0	Open

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

4. Make a selection and Savethepage.

See Appendix D for Project Status Type Reference Chart.



1. Navigational path: Project Costing>Project Definitions>General Information

#### Choose the Attachments Panel

<	Phases	Approval	Justification	User Fields	Rates	Attachments	Asset Integration Rules	Budget Alerts	Supplemen
	Proje	ct AAI3429		C	escription	Project Lite Manual	9.2		
Doc	ument Atta	chments					14 4 1.1 11	11 N N	Manu All
-	. ~						1 1 1-10		1 VIEW MI
Re	quests	Attac	hed File						
1									
1							-	1	

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

File Attachment ×		
		Help
Browse No	o file selected.	
Upload	Cancel	
		.::

3.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

<b>UW Gift in Kind</b> Enter any information you have and click Search. Leave fields blank for a list of all values.				
Find an Existing Value				
▼ Search Criteria				
Search by: Business Unit	- = UWSYS			

2. Click on Add a New Value.



UW Gift in Kind	
<u>F</u> ind an Existing Value	Add a New Value
Business Unit UWSYS	3
Add	

3. Click the **Add** button.

UW Gifts In Kind	
	UW GIFTS IN KIND
Business Unit	UWSYS
UW Gift in Kind Id	NEXT
Issue Date	10/12/2020
Principal Investigator	Q
*Department Code	Q
*UW Gift in Kind Donor	
Donor Address City/State	
*Gift in Kind Description	
Send Email Notification:	Email ID
Save	

### UNIVERSITY OF UW System Shared Financial System

Gifts in Kind	Description
Business Unit	The user's business unit will be populated
	automatically. (This is based upon set up of
	This will be oute source a with the
Gilt in Kind ID	I his will be auto numbered with the
	exception of the Gifts in Kind that get
	converted from ESN1.
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
<b>UW Project Type Conversion</b>

Sponsored Descriptions	ESIS Project Types mapped into this Type	Convert 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,	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 MSN, MIL, STP, SYS) 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, et
Sponsor contact name:
Sponsor contact title:
Sponsor contact phone number:
Sponsor fax number:
Additional information:

Complete form on-line at http://www.rsp.wisc.edu/sfs/AddSponsorInfo.cfm



#### Appendix C Enter a Manual Budget Journal for Projects

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

Create/Update Journal Entries				
<u>F</u> ind an Existing Value	Add a New Value			
Business Unit UWSYS	s <b>Q</b>			
Journal ID BUD123	3			
Journal Date 10/12/20	020 🗰			
Add				

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

Header     Lines     Totals	Errors Approval	
Unit UWSYS	Journal ID BUD123	Date 10/12/2020
Long Description	Enter Project Budget	<b>جر</b> ا :.
	234 characters remaining	
*Ledger Group	STD_BUDGET <b>Q</b> Adjusting Entry	Non-Adjusting Entry ~
Ledger	Q Fiscal Year	2021
*Source	BUD Q Period	4
Reference Number	ADB Date	10/12/2020
Journal Class	Q	
Transaction Code	GENERAL Q	Auto Generate Lines
SJE Type	×	✓ Save Journal Incomplete Status ☐ Autobalance on 0 Amount Line

- 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

CONSIN SYSTEM	UW Sy	ystem	Shared	Finan	cial Syste	em											
<u>H</u> eader	Lines	Totals	Errors	<u>A</u> pproval													
Unit • Lines	UWSYS Template List	t r/IntraUnit	L .	Journ *Pro	al ID BUD123	nal		~	Date	10/12/2020 Change Values Pro	ocess						
■, Q																	1-1 of 1 🖂
Select	Line	*Ui	nit	*Ledg	er	SpeedType		Account		Fund	Dept		Program		Class		PC Bus Unit
	1	UV	VSYS	Q STD_E	BUDGET		٩	ZLUMP	Q,	144 Q	962000	Q	4	Q,		۹	UWSYS
		٢															>

- 8) Enter the appropriate ChartFields
  - a. Account = **ZLUMP** (if you are not splitting it to various categories)
  - b. Fund
  - c. Department
  - d. Program
  - e. PC Bus Unit = Your campus SetID
  - f. Project
  - g. Activity may default in if you are using the grants module (leave blank for everyone else)
  - h. Scenario = **PROJ\_GRANT**
  - i. Base Amount = amount that was previously entered into the award amount on the Project Lite Bolt-On
  - j. Click the **Save** button
  - k. Click the **Process** button to *Edit* the Journal (Journal Status must change to V for valid)
- 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	it you want to po	st this journal	? <mark>(</mark> 5010,45)
	OK	Cancel	

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



Project	Project	Description Project Status Control		trol	Contracts				
Status Value*	Status Descr*		Effective Status ("Processing Status")	Analysis Types	Control Action	Contract Status	Contract Processing Status		
0	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	GLE COM BUD CBU	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		
С	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 Warning Warning	Closed	CLOSED		

#### **Appendix D Project Status Types Reference Chart**

#### UNIVERSITY OF WISCONSIN SYSTEM UW System Shared Financial System



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

\*Values are as configured in PROJ\_STATUS\_TBL

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

Analysis Type Values:

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