



**University of Wisconsin System  
SFS Business Process  
GL.3.05 – Four-way Project Edit  
Maintenance**

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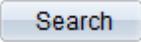
**Business Process Overview**

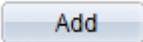
<b>Process Frequency</b>	If a campus chooses to use the 4-way Project Edit functionality, this process must be done every time a new project is created, or whenever the allowable Fund(s), Department(s), or Program Code(s) change for a specific Project ID.
<b>Dependencies</b>	Project ID must exist in SFS.
<b>Assumptions</b>	4-way Project Combo Edit rules are turned on for the Business Unit.
<b>Responsible Parties</b>	Campus users of Project Costing (either Project Lite or Grants Campuses)
<b>Alternate Scenarios</b>	None

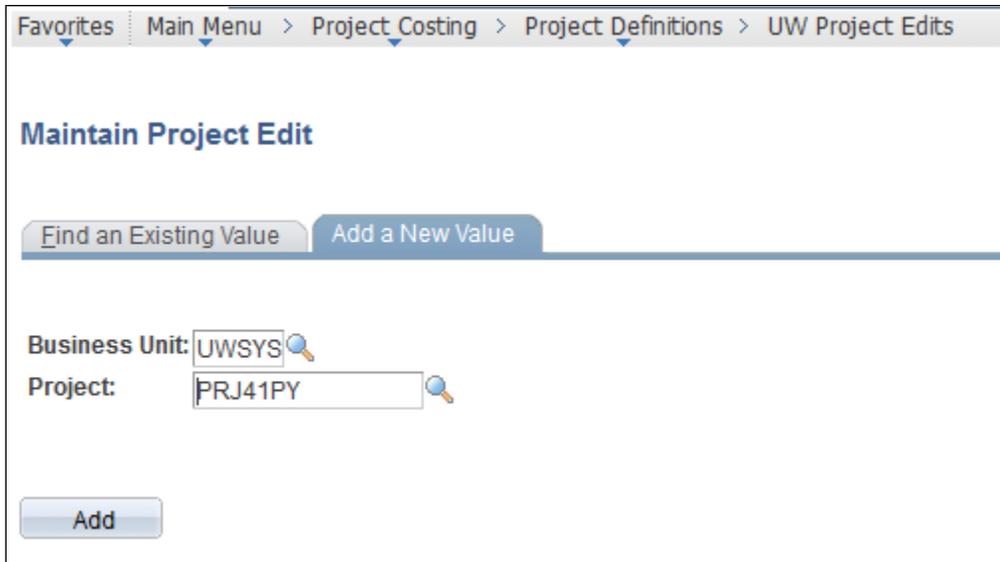
As a part of the upgrade to PeopleSoft 9.1, one piece of functionality that will be made available to campuses to use is a Four-way Project ID Combination Edit. This Four-way Combination Edit uses Project ID as the anchor and allows campuses to determine the allowable Fund(s), Department(s), or Program Code(s) for a given Project ID. Only institutions using Project Lite or PeopleSoft Grants will be able to leverage this functionality. The Four-way Edit page facilitates easy maintenance of Project Edits without having to maintain multiple trees. The process for creating and maintaining the Four-way Project Edit process is detailed below.

**Process Detail**

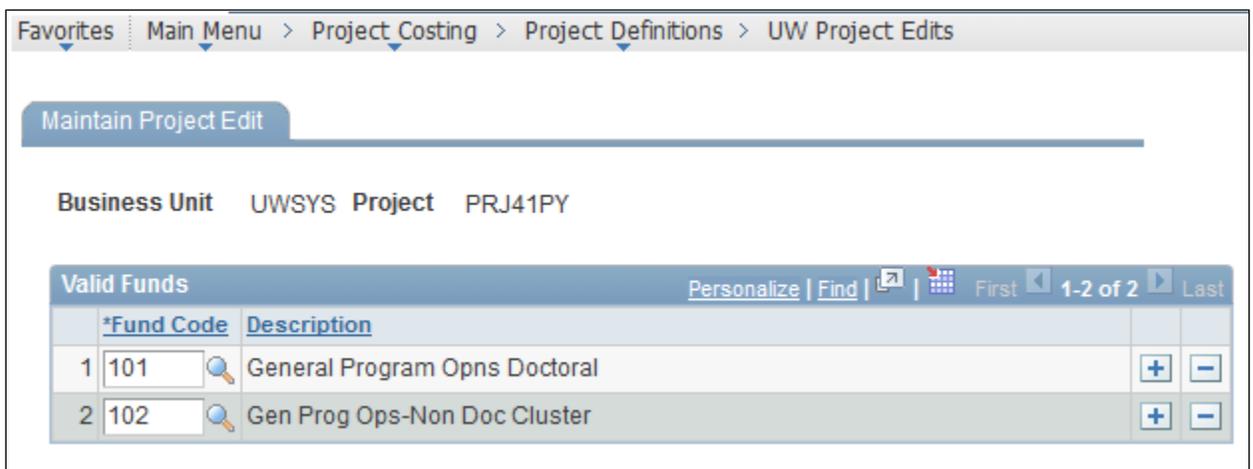
**I. Four-way Project Edit Maintenance Process Detail**

1. **Navigate** to the Maintain Project Edits page:
  - a. Project Lite Campuses: *Navigation: Project Costing > Project Definitions > UW Project Edits*
  - b. Grants Campuses: *Navigation: Grants > Awards > UW Project Edit*
2. To search for an existing Four-way Edit combination for an existing Project ID, **enter** the *Project ID* and **click** 

3. To add a new Four-way Edit combination for a new Project ID, **click** the ‘Add a New Value’ tab.
4. **Enter** *Business Unit*
5. **Enter** *Project ID*
6. **Click** 



7. This page allows you to designate which Fund(s), Department(s), and Program Code(s) are valid for this specific Project ID.
8. To add a valid *Fund* for this *Project ID*, **enter** the *Fund Code*.
9. To add additional valid *Funds*, **click** the  and **enter** the *Fund Code*.



Valid Funds		Personalize   Find	First	1-2 of 2	Last
#Fund Code	Description				
1 101	General Program Opns Doctoral				+ -
2 102	Gen Prog Ops-Non Doc Cluster				+ -

10. To add a valid Department for this *Project ID*, **enter** the *DeptID* (Department ID)
11. To allow ALL Departments to be valid for this *Project ID*, **click** the *All* checkbox.
12. To allow all Departments in a specific Node to be valid for this *Project ID*, **enter** the Department Node in the *Node* field.

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- a. For example, if you would like all *DeptID*'s that begin with '53' to be valid, enter '53'. If you would like all *DeptID*'s that begin with '5301' to be valid, enter '5301'.
13. To add additional valid Department rows, **click**  and **enter** the *DeptID*.

Favorites | Main Menu > Project Costing > Project Definitions > UW Project Edits

Maintain Project Edit

Business Unit UWSYS Project PRJ41PY

Valid Funds Personalize | Find |  First 1 of 1 Last

	*Fund Code	Description		
1	<input type="text"/>	<input type="text"/>		

Valid Departments Personalize | Find |  First 1-2 of 2 Last

	All	Node	Deptid	Description		
1	<input type="checkbox"/>	<input type="text"/>	503850	BadgerNet		
2	<input type="checkbox"/>	<input type="text"/>	033000	Library Acquisitions		

14. To add a valid *Program Code* for this *Project ID*, **enter** the *Program Code*.
15. To allow ALL *Program Codes* to be valid for this *Project ID*, **click** the *All* checkbox.
16. To add additional valid *Program Codes*, **click**  and **enter** the *Program Code*.

Favorites Main Menu > Project Costing > Project Definitions > UW Project Edits

Maintain Project Edit

Business Unit UWSYS Project PRJ41PY

Valid Funds Personalize | Find | First 1 of 1 Last

*Fund Code	Description
1	

Valid Departments Personalize | Find | First 1 of 1 Last

All	Node	Deptid	Description
1			

Valid Programs Personalize | Find | First 1-2 of 2 Last

All	Program Code	Description
1	4	Research
2	1	Institutional Support

17. Click  Save

**Note:** The Combo Edit Build process will run overnight to add the Four-way edits that you entered for this specific Project ID to the list of valid combinations.

**Note:** If you have left one of the validation fields blank (Fund, Department, or Program Code), the combo edit rule will ignore that validation.

**Note:** The Four-way Project Edit combo edit rules must be enabled for your Business Unit in order for these validations to work. At a Business Unit level, if you would like the Four-way Project Edits enabled, please contact UWSA Problem Solvers ([uwsaproblemsolvers@maillist.uwsa.edu](mailto:uwsaproblemsolvers@maillist.uwsa.edu)).

## Revision History

Author	Version	Date	Description of Change
Brendan McHugh	1.0	3/12/2013	Initial Draft
Susan Kincanon	1.1	05/07/2013	Final review and publish to website
Jon Ahola	1.2	06/13/2013	Final Review