Working on Projects
Working with the Project Browse

If you have only project input or approval authorization, when you sign onto Labor Accounting, the Project Browse page is displayed. Working from the Project Browse page is a little different from working from the General Browse page:

- On the Project Browse page, you search based on project/grant, and you may use fiscal year or date range, or a name or EmplID as additional search criteria.

- To add a person to a project, you specify the project/grant number and the person’s EmplID (see “Adding a Person to a Project,” on page 160 for detailed instructions).

- The Project Summary is displayed on the Project Browse page, listing the personnel charged to the project. You select records to edit in the same way as on the General Browse page, but on the person’s record, you will see only the information for the specified project (unless you click the All P/G button and are authorized to see other projects).

**Note:** If you have only project authorization, you cannot add a vacancy. Ask someone with department authorization to create the vacancy. Once the vacancy is created, you can distribute encumbrances for the vacancy to your projects.

This chapter contains information on locating and editing records from the Project Browse page.
If you have project/grant access, you can display a summary of project distributions for all personnel charged to a project, and edit those distributions from the Project Browse page. If you have only project/grant access, the Project Browse page is displayed when you sign onto Labor Accounting. If you also have higher level access, you can access the Project Browse page from the General Browse page, by clicking the Proj Browse button.

To display project-related commitments on the Project Browse page, you must first specify the project for which you want to review commitments. You can locate the project grant by number, using the Find Project Grant window. You can also restrict the project summary to a specific date range or employee, if desired. You can then review a summary of the commitments on the Project Browse page.

If a person you are not authorized to see has been charged to the project, but the charge has not been fully approved, the person is listed on the summary with dashes replacing the amounts. When the charge is approved, the actual amounts charged to the project will be displayed.

To change the encumbrances, click on the Edit button at the end of the line for the person whose encumbrances you want to change. When you edit a record from the Project Browse page, only the pages for earnings types that can be charged to a project are displayed.
What’s on the Project Summary?

The Project Summary area of the Project Browse page lists the personnel who are charged to the selected project, and summarizes the total amount charged for each person in the current, previous, and budget year of the project/grant, as well as the year prior to the previous year. The total commitment for each year is displayed at the bottom of each column.

If a person you are not authorized to see has been charged to the project, but the charge has not been fully approved, the person is listed on the project summary, with dashes replacing the amounts. When the charge is approved, the actual amounts charged to the project will be displayed.

Each person charged to the project is listed by both name and employee ID (EmplID), and their staff class and home department is displayed.

Creating and Using the Project Summary

The project summary is displayed using the Project Browse page. Once you have created the project summary, you can edit the project distributions for each person listed.

You create the project summary by selecting values in the Search Criteria panel. In this panel, you can also see a list of projects that need approval, and you can search for a person you need to add to your project.
To display a project listed in the Need Approval list:

1. On the Project Browse page, locate the project/grant number in the Need Approval list.

2. Highlight the project number in the list, and press the Ctrl + C keys to copy it.

3. Click in the Project Grant field, and press the Ctrl + V keys to paste the project/grant number into the field.

4. Click the Search button to display the project summary. The names in red are the people whose project funding needs to be approved.

To display a project on the Project Browse page:

1. If you are not already on the Project Browse page, and you have department or central office approval authority, click on the Proj Browse button at the bottom of the General Browse page. (Scroll down, if necessary to see the buttons.) The Project Browse page is displayed.
2. In the Search Criteria panel, type the 7-digit project/grant number, if you know it, in the Project Grant field, or click the Find button to use the Find Project/Grant window to locate the project/grant number. For instructions on using the Find Project/Grant window, see “Using the Find Project/Grant Window,” on page 172.

*Important!* The Project/Grant is required, regardless of any other criteria entered on this page.

*Note:* If you search for a project/grant that is the default project/grant for an earnings type in your department, you will be able to see the data on the detail pages, but you will not be able to edit the data for the default project/grant. However, you will be able to add or remove other projects for which you are authorized.

3. If you want to limit the display to a particular date range, select the Fiscal Year or Date Range for which you want to see project commitments:

   - To select one or more years, click on the checkbox before (to the left of) each year you want to include. Only individuals who have project commitments during the selected year(s) will be displayed on the Project Browse page.

   **Tip!** Fiscal years are known by the ending year, so the 05-06 year would be known as fiscal year 2006.

   - To select a date range, select the year and month from the drop-down list in the From and To fields.

     Only individuals who have project commitments during the selected period will be displayed on the Project Browse page.

   *Note:* The Project Browse page will include data for up to 4 fiscal years: the current, previous, and budget year, and the year prior to the previous year.

4. To limit selections by name or ID, enter values in the Name & Emplid area:
• To limit your view to one or more people whose names begin with the same letters, enter as much of the last name as you know in the Last field, and as much of the first name as you know in the First field.

• To limit your view to a single person, enter the person’s Employee ID (their PeopleSoft EmplID) in the ID field.

**Tip! You can find a person’s ID by name, department, and other criteria by clicking the Find button next to the ID field.**

5. To display only vacancies, select **Vacancies Only** from the drop-down list in the Special field.

6. When you have entered all the desired search criteria, click the Search button or press the Enter key to display the selected commitments for the specified project.

   To reset the values in the Search Criteria panel to the last search values used, click the Reset button. To clear all values in the Search Criteria panel, click the Clear button.

7. To edit a person’s project distributions, click on the Edit button at the end of the line that contains the person’s name. The appropriate detail pages are displayed for the selected person.
Chapter 6: Working on Projects

Editing from the Project Browse Page: Buttons

When you edit a person’s distributions from the Project Browse page, the Summary pages are not displayed. Instead, you will see the tabbed detail pages that apply for the individual you are editing. Because the Summary page is not available, the following buttons are displayed on the detail pages:

- **View Cmt**: Use to display comments on the displayed person’s record, and status information from PeopleSoft HR.
- **Quit Edit**: Use to return to the Project Browse page without saving or submitting changes. If you have made changes, a warning will be displayed, giving you the option to continue without saving, or to return to the page and save your changes.

**Important! Do not use the browser’s Back button to return to a previous page. This leaves the record in Edit mode, locking out all other users until either you return to the record or the system resets overnight. If the system resets the record, any changes will be lost.**

- **In Eff**: Use to display the distributions currently in effect for the displayed person. To return to the edit page, click the Edit button.
- **Save**: Use to temporarily save changes without submitting them for approval. The record will be locked to other users for 24 hours. After that, your changes will be lost only if another user makes changes that interfere with your changes.

**Tip! Clicking Save returns you to the browse page.**

- **Submit**: Use to approve changes at all levels for which you are authorized, and submit changes for other approvals.

For summer salaries, if you have departmental authorization as well as project authorization, you **must** submit the summer salary from the General Browse page. Save the changes here, and then re-open and submit from the General Browse page.

**Tip! It is not necessary to save changes before submitting them for approval.**
Locating Personnel on the Project Browse Page

In addition to these buttons, the buttons typically found on the detail pages are also displayed:

- **Help**
  - Use to display the help topic that introduces or explains the displayed page. This button appears on most pages. If you need more help than is provided in the help topic, click the Contents button at the top of the topic page to display the help contents.

- **Prev**
  - Use to display the previous record on the Project Browse page. If you have made changes, a warning will be displayed, giving you the option to continue without saving, or to return to the page and save your changes.

- **Next**
  - Use to display the next record on the Project Browse page. If you have made changes, a warning will be displayed, giving you the option to continue without saving, or to return to the page and save your changes.

- **Add Period**
  - Use to add a distribution period for less than the full fiscal year.

- **Add Yr End**
  - Use to add a distribution period for the fiscal year.

- **Del Period**
  - Use to delete a distribution period. If there is only one distribution period, this button will be dimmed.

- **Add P/G**
  - Use to add a project/grant for which you have authorization.

- **Calc**
  - Use to recalculate values after making changes. This also temporarily saves your changes, so you don’t have to stop and save them manually.

- **Clean**
  - Use to remove blank or zeroed lines.

- **Reset**
  - Use to return values to the last values that were sent to the database. This can be used until you click a button or perform an action that interacts with the database.
There are also a few buttons specific to the Project Browse environment:

- **All P/G**
  - Use to display all project/grant distributions for the individual. You will still see only those project/grants for which you are authorized.

- **BRWS P/G**
  - Use to return the display to only the project/grant you selected on the Project Browse page.

- **20xx**
  - Three buttons labeled with the 4-digit years for the prior, current, and budget year, respectively. Use to display the distributions for the appropriate year.

**Note:** The year button for the currently displayed year is always dimmed.
Changing Project Distributions

You can change distributions for the projects for which you are authorized by adding distribution periods or changing the amount or percent of the distributions that are already there. For example, you may want to add a distribution period when a project is closing, to remove distributions for that project.

Adding and Deleting Distribution Periods

You can add, change, or delete distribution periods for project/grant distributions. Each earnings type must have at least one distribution period, so if only one distribution period exists for an earnings type, it cannot be deleted.

Many faculty and staff encumbrances are open ended. This is indicated in the Distribution area by a Period End date of 12/31/2999. If you want to add a distribution period for the fiscal year you are updating, click the Add Yr End button. A period will be added from July through the following June, or for faculty, from September through the following June.

Note: For faculty members, the REG page shows a separate summer period. You cannot change the project distribution for the summer salary on the REG page; summer salary distributions are maintained on the FSS page.

If you want to add a distribution period shorter than a year, use the Add Period button.

To add distribution periods for project/grant distributions:

1. From the Project Browse page, select the person you want by clicking the Edit Summary button on that line. The earnings type pages are displayed.

2. Click on the page tab for the earnings type you need to change.

3. To add a distribution period for the fiscal year, click on the Add Yr End button in the Distribution area, and continue with Step 6.
To add a shorter distribution period, click the Add Period button. The Add Period window is displayed.

**Tip!** You can cancel the add by clicking on the Cancel button.

4. In the *Begin Date* field, type the starting date for the new time period using the format *m/d/yyyy*, or double click in the field to display a calendar where you can select the date. (See “Using the Calendar Window,” on page 171 for more information.)

5. Click on the Finish button (or press the Tab and then the Enter key). The page will be redisplayed with the new distribution period using the percentages from the previous period. The end date of the new period is what was the end date of the previous period, and the end date of the previous period is the day before the beginning date you entered for the new period.

6. To change the distributions based on the FTE percentage, type the percentage of the overall commitment to be charged to the project/grant (50% is entered as 0.500) in the *Distrib FTE* field.

To change distributions based on the dollar amount to be charged to the project/grant:

a) Click the $ checkbox to open the *Distrib Amt* field for input.

b) Type the amount to be charged to the project/grant in the *Distrib Amt* field.
7. Click the Calculate button to calculate the remaining values for all of the project/grants.

**Note:** If you are adding an amount to your project/grant, the same amount will be subtracted from the default project/grant. If you are reducing an amount for your project/grant, the default project/grant will be incremented by the same amount.

8. When the distributions are correct, you can select another earnings type by clicking on the appropriate tab, or work on another year by clicking on the appropriate year button.

9. When you are finished with changes for this individual, click the Submit button at the bottom of the page to save your changes and submit them for approval.

If you are not ready to submit the changes for approval, click the Save button. The record will be locked to other users for 24 hours.

**To delete an existing distribution period:**

1. From the Project Browse page, select the person you want to update by clicking the Edit button on that line. The tabbed earnings type pages are displayed.

2. If the top page is not the one you need, click on the tab to open the page for the desired earnings type.

3. Click on the Del. Period button. The Delete Period window is displayed.

**Note:** On the REG page for faculty, two distribution periods are always displayed, one for summer and one for the academic year. If these are the only two periods displayed, you cannot delete either period.

**Tip!** You can cancel this action by clicking on the Cancel button.
4. In the Begin Date field, select the beginning date of the period you want to remove from the drop-down list, and click the Finish button. You are returned to the page, and the distribution period is deleted. The previous distribution period is extended to the date when the deleted period ended, and the support commitments are recalculated.

**Note:** If the support in the remaining period(s) is distributed to the wrong project/grant(s), you will need to change the amounts allocated to each project/grant for which you are authorized. See “Changing Project/Grant Distributions,” on page 154 for instructions.

5. When the commitments are correct, you can select another earnings type by clicking on the appropriate tab, or work on another year by clicking on the appropriate year button (on the bottom right).

6. When you are finished with changes for this individual, click the Submit button at the bottom of the page to save your changes and submit them for approval.

If you are not ready to submit the changes for approval, click the Save button. The record will be locked to other users for 24 hours.

**Changing Project/Grant Distributions**

Project/grant distributions can be added or changed by users who are authorized for that project/grant, or by users who are authorized for any department. If the user who makes the changes is not authorized for that project/grant, the changes are submitted for approval by the owner of the project/grant.

**Important! You will not be able to enter distributions for projects that are closed (that is, before the project open date or after the project close date). If the current date is after the project close date, you cannot enter distributions to that project, because it would require booking the changes after the close date.**

While you can change existing project/grant distributions, you cannot change the project/grant numbers. If your project/grant has been charged incorrectly, you must zero out the distributions charged to the project/grant, and click the Clean button to remove the line. If you are authorized for the correct project/grant, you can then add it and enter the correct distributions.
When adding another project/grant for which you are authorized, you can look for the project/grant number using any of the following search criteria:

- The first several digits of the project/grant number. The resulting project/grant list will be limited to project/grants that begin with the specified digits.
- The department number of the department that owns the project/grant. This is also the first three characters of the project/grant number, and the resulting project/grant list will be limited to project/grants in the specified department.
- Sponsored projects. If you check this box, only sponsored projects will be listed.
- Primary Investigator. All projects with the specified P.I. will be listed.
- Fund. All project/grants that use this fund code will be listed.

If you select multiple search criteria, the resulting list will include only those project/grant numbers that match all of the specified criteria.

**Note:** When working from the Project Browse pages, you will not be able to add a project/grant for which you are not authorized. The Find Project Grant window will only list projects for which you are authorized.

Although you will not see it on the project browse detail pages, when you add or remove distributions for your project/grant, the default project/grant is adjusted automatically, so the total commitment remains the same.

**To change existing project/grant distributions:**

1. From the Project Browse page, select the person you want by clicking the Edit Summary button on that line. The earnings type pages are displayed.

2. If the top tab is not the one you need to change, click on the page tab for the earnings type you need to change.

3. To change the distributions by percentage, type the FTE percentage to be charged to the project/grant (50% is entered as 0.500) in the Distrib FTE field.

    To change the distributions by dollar amount:

    a) Click the $ checkbox to open the Distrib Amt field for input.
b) Type the amount to be charged to this project/grant in the *Distrib Amt* field.

4. Click the Calculate button to calculate the remaining values for all of the project/grants.

**Note:** If you are adding an amount to your project/grant, the amount will be subtracted from the default project/grant. If you are lowering an amount for your project/grant, that amount will be added to the default project/grant.

5. When the distributions are correct, you can select another internal support type by clicking on the appropriate tab, or another year by clicking on the appropriate year button.

6. When you are finished with changes for this individual, click the Submit button at the bottom of the page to save your changes and submit them for approval.

   If you are not ready to submit the changes for approval, click the Save button. The record will be locked to other users for 24 hours.

**To add another project/grant:**

1. From the Project Browse page, select the person you want by clicking the Edit Summary button on that line. The earnings type pages are displayed.

2. If the top tab is not the page you need to change, click on the page tab for the earnings type you need to change.

3. Click the Add P/G button. The Find Project Grant window is displayed.

**Note:** You will not be able to select a project/grant for which you are not authorized when working from the Project Browse pages. The Find Project Grant window will only list projects for which you are authorized.
Changing Project Distributions

4. Enter the desired search criteria:

**Begin**

Enter the first several digits of the project/grant number. The resulting project/grant list will be limited to project/grants that begin with the specified digits.

**Dept**

Enter the department number of the department that owns the project/grant. This is also the first three characters of the project/grant number, and the resulting project/grant list will be limited to project/grants in the specified department.

If you are authorized for only one department, that department will be used as the default search criteria.

**Sponsored Project**

Click on this checkbox to list only sponsored projects (projects in the Fund 40 or 60 series).

**P. I.**

Select the primary investigator from the drop-down list. All projects with the specified P. I. will be listed. If you select ---- All ----, the list will not be filtered by P. I.

**Fund**

Select the desired fund code from the drop-down list. All project/grants that use this fund code will be listed. If you select ---- All ----, the list will not be filtered by fund code.

5. Select the desired project/grant number by scrolling through the list and clicking on the desired project/grant. Click the Finish button to add the new project/grant number.

**Note:** If the desired project/grant is not included in the list, contact the Controller’s Office.
Chapter 6: Working on Projects

The earnings type page is redisplayed with a new line for the new project/grant.

6. If you know the FTE percentage to be charged to the new project/grant:
   a) Type the percentage of the overall commitment to be charged to the project/grant (50% is entered as 0.500) in the Distrib FTE field.

If you know the dollar amount to be charged to the new project/grant:
   a) Click the $ checkbox to open the Distrib Amt field for input.
   b) Type the amount to be charged to this project/grant in the Distrib Amt field.

   **Note:** If you add a summer salary from the Project Browse detail pages but you have department-level authorization, you must save the changes, and then reopen the record from the General Browse page to submit the changes.

7. Click the Calculate button to calculate the remaining values for all of the project/grants.

8. When the distributions are correct, you can select another earnings type by clicking on the appropriate tab, or work on another year by clicking on the appropriate year button.

9. When you are finished with changes for this person, click the Submit button at the bottom of the page to save your changes and submit them for approval.

   If you are not ready to submit the changes for approval, click the Save button. The record will be locked to other users for 24 hours.
To delete a project/grant from a distribution period:

1. From the Project Browse page, select the person you want by clicking the Edit Summary button on that line. The earnings type pages are displayed.

2. If the top tab is not the page you need to change, click on the page tab for the earnings type you need to change.

3. Type zeros in the Distrib FTE field for the project/grant you want to delete.

4. Click the Calculate button to zero out the remaining fields for the project/grant. The distributions will be re-allocated to the default project/grant.

5. Click the Clean Data button to remove the zeroed out project/grant line.

6. When the distributions are correct, select another internal support type by clicking on the appropriate tab, or select another year by clicking on the appropriate year button.

7. When you are finished with changes for this individual, click the Submit button at the bottom of the page to save your changes and submit them for approval.

If you are not ready to submit the changes for approval, click the Save button. The record will be locked to other users for 24 hours.
Adding a Person to a Project

When you are staffing a project, you will need to add personnel to the project in Labor Accounting. You can do this through the Project Browse page by searching for the person to add along with the project/grant, and then adding the distributions on the appropriate detail pages.

Although you will not see it on the project browse detail pages, when you add distributions to your project/grant, the default project/grant is adjusted automatically, so the total commitment remains the same.

Note: When you add a project/grant distributions for a person you are not authorized to see, the calculated value (amount if you entered the FTE, FTE if you entered the amount) is not displayed. In addition, the project summary displays the values as dashes until the distributions are fully approved. When the distribution has been fully approved, the amounts will be displayed on both the project summary and the detail pages.

To add a person to a project:

1. On the Project Browse page:
   a) Select the project to which you are adding staff. (See “Using the Find Project/Grant Window,” on page 172 if you need more information.)
   b) Enter the person’s EmplID in the ID field. If you do not know the person’s EmplID, click the Find button next to the ID field or double-click the ID field to display the Find Person window. (See “Using the Find Person Window,” on page 162 if you need help using the Find Person window.)
   c) Click the Search button to display the person’s record in the Project Browse page.

2. Click the Edit Summary button for the person. The earnings type detail pages are displayed.

3. If the top tab is not the page you need to change, click on the page tab for the earnings type you need to change.
4. On the earnings type page, the project you entered in the search criteria on the Project Browse page is displayed, with distributions of zero in all fields.

**Note:** If you selected a project/grant that is closed for any portion of the distribution period, the project/grant is added, but the distribution period ends on the date when the project/grant is closed. Because the closed project/grant **must** have Distrib Amts of **0.00** (zero) in the period for which it is closed, an additional distribution period is added with zero amounts that cannot be changed for the closed project.

5. If you know the FTE percentage to be charged to your project/grant:

   a) Type the percentage of the overall commitment to be charged to the project/grant (50% is entered as **0.500**) in the Distrib FTE field.

   If you know the dollar amount to be charged to your project/grant:

   a) Click the $ checkbox to open the Distrib Amt field for input.
   b) Type the amount to be charged to this project/grant in the Distrib Amt field.

6. Click the Calculate button to calculate the remaining values for all of the project/grants.

**Note:** When you add a project/grant distributions for a person you are not authorized to see, the calculated value (amount if you entered the FTE, FTE if you entered the amount) is not displayed. In addition, the project summary displays the values as dashes until the distributions are fully approved. When the distribution has been fully approved, the amounts will be displayed on both the project summary and the detail pages.

7. When the distributions are correct, you can select another internal support type by clicking on the appropriate tab, or work on another year by clicking the appropriate year button.

**Note:** If you add a summer salary from the Project Browse detail pages but you have department-level authorization, you must save the changes, and then reopen the record from the General Browse page to submit the changes.
8. When you are finished with changes for this person, click the Submit button at the bottom of the page to save your changes and submit them for approval.

If you are not ready to submit the changes for approval, click the Save button. The record will be locked to other users for 24 hours.

**Using the Find Person Window**

The Find Person window is displayed when you click on the Find button next to the ID field, or double-click on the ID field in the Project Browse search criteria panel.

**To find an ID using the Find Person window:**

1. Enter as much of the last name as you are sure of in the Last Name field.

2. Enter as much of the first name as you are sure of in the First Name field.

3. If you know the person’s department, enter the three-digit department code in the Dept field.

4. If you know the person’s staff class, select it from the drop-down list in the Staff Class field.

5. If you know the beginning of the person’s employee ID (their PeopleSoft EmplID), enter it in the PUID field.

6. The Currently Active checkbox is selected by default. If you are adding a person to a project retroactively, and the person is no longer an active employee (or graduate student), click on the Currently Active checkbox to deselect it.

   **Note:** You will only be able to add a person to the project during a period in which that person was active.

7. Click the Find button to find all the records that match your search criteria.
8. Double click on the person’s name to select the person you want from the list, or click once and then click the Finish button. You are returned to the Browse page, and the EmplID for the selected person is displayed in the ID field.