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Project Headers [1]

February 8, 2017 by Carl Sorenson [2]

PROJECT CF AR TYPE is no longer maintained by CU, so m-Fin is changing what displays in project headers.

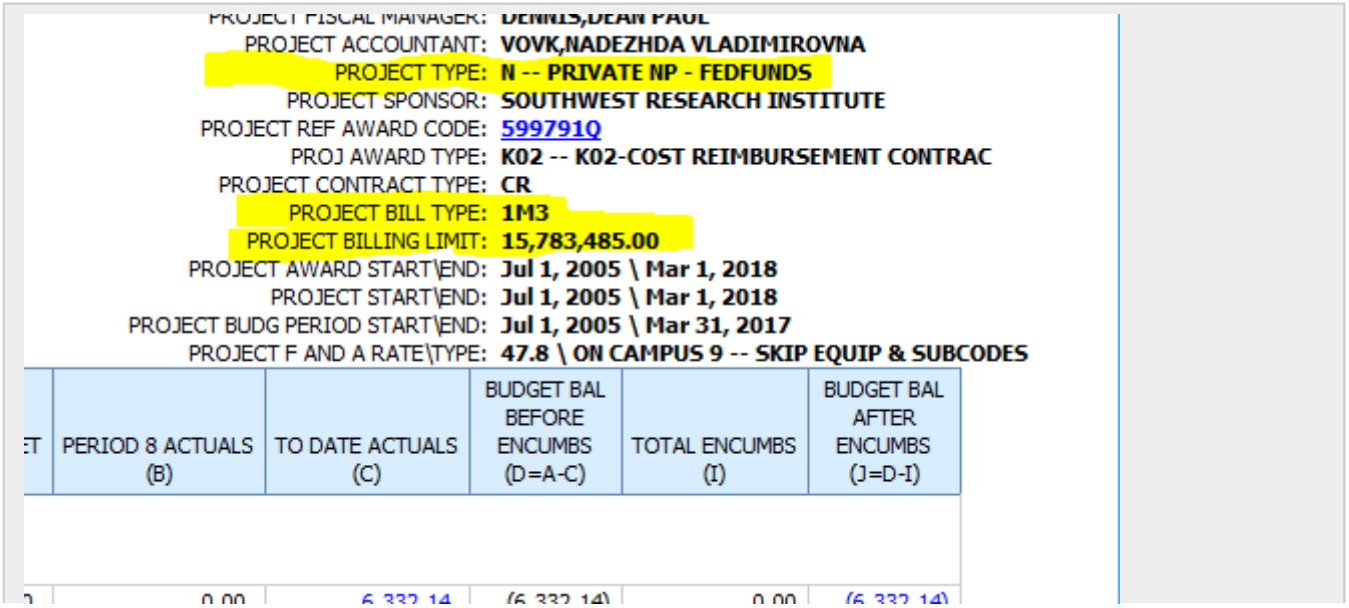
PROJECT BILL TYPE

With PeopleSoft 9.2 CU is using PROJECT BILL TYPE. It's a three character code. The first character is a digit indicating campus. The remaining two characters indicate the billing type. Here are some examples:

- 1LC -- LETTER OF CREDIT
- 1M3 -- UCB MONTHLY BUDGET/CUR/CUMULAT
- 2GR -- UCD GRANTS BILLING
- 202 -- UCD FED LOC DETAILED

We don't yet have the descriptive labels to put into the reports. We are working on that but want to go forward with just the codes for now, intending to add the descriptive labels as soon as we can.

We are adding some other project data elements while we are at it, that we have heard will be helpful. These include PROJECT TYPE and PROJECT BILLING LIMIT. This image shows and example of the new header:



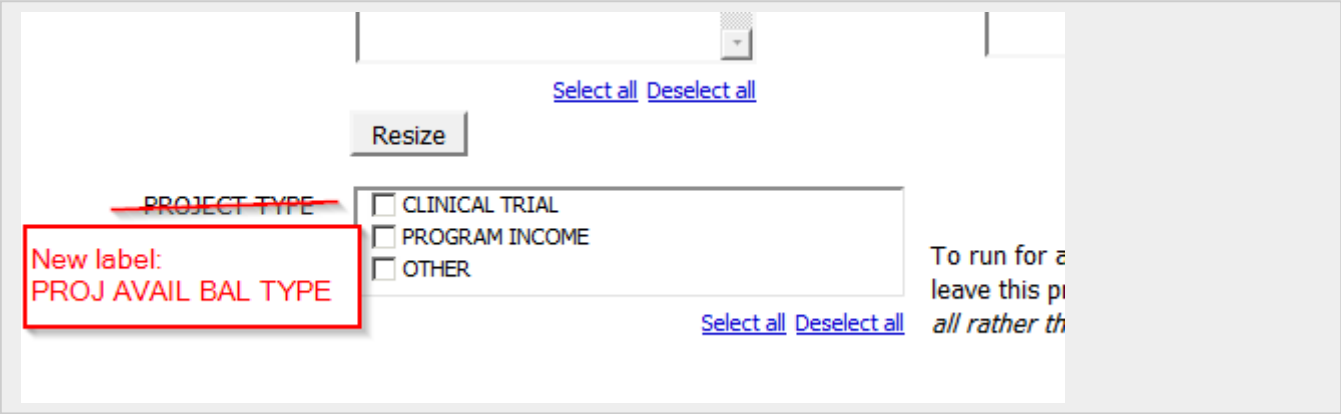
Project Header

PROJECT BILLING LIMIT

When there is one, the billing limit is almost always the same as the budget. We have added it to the project header because the people who work on your billing appreciate seeing the limit displayed separately, so there is no wondering about it.

PROJECT TYPE

m-Fin already had its own data element called PROJECT TYPE, available as an optional prompt in some reports. To avoid confusion with the PeopleSoft data element of the same name that is now going into the header, we are changing the m-Fin data element name to PROJ AVAIL BAL TYPE.



Testing

Here are the reports with project headers. Try them now in Cognos QA [3]. Unless we hear of problems we'll migrate them to production at the end of this month (February, 2017):

- m-Fin OPERATING SUMMARY
- m-Fin BALANCE SHEET SUMMARY
- m-Fin REVENUE AND EXPENDITURE SUMMARY
- m-Fin REVENUE AND EXPENDITURE TOTAL
- m-Fin TRIAL BALANCE SUMMARY
- m-Fin TRIAL BALANCE TOTAL
- m-Fin BAE BY MONTH - SUMMARY

These other reports also are changing, but more subtly, either because they have always had simpler headers, or because do not actually have project headers. We welcome your testing of these as well:

- m-Fin ACCOUNTING SUMMARY
- m-Fin EXPENDITURE TYPE SUMMARY
- m-Fin FINANCIAL DETAIL

- m-Fin FINANCIAL DETAIL II
- Project Reports > m-Fin PROJECT FINANCIAL STATUS
- Project Reports > m-Fin PROJECT FISCAL YEARS
- Project Reports > m-Fin PROJECT ONE-LINER
- Project Reports > m-Fin PROJECT SPEEDTYPE ONE-LINER
- Project Reports > m-Fin PROJECT SPENDING TRENDS

Sarju and I would like to thank Denver|Anchutz's Barb Hayes for her guidance as we have worked on these changes.

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