

3.0 Appendix B – Project Aspire Enhancement Functional Design

ADML ID	165
ADML Description	Project-ID Prefix Numbering
ADML Tech #	159

3.1 Background

3.1.1 Functional Requirement

Allow the values for grant or State grant / subgrant to be assigned sequentially by the system or assigned by the user agency.

3.1.2 Delivered Functionality

Since Project IDs might be shared over many business units (agencies), there can only be one SetID. PeopleSoft does not deliver the functionality to automatically place the first 4 alphanumeric characters on the Project ID based on the agency.

3.1.3 Gap Description

Agencies will now be required to have similar naming conventions for awards and projects to maintain standardized data entry and definitions of Projects, Grants, and Contracts. In Aspire, Project IDs are BU keyed, yet are restricted from duplication due to inter-unit transactional relationships. Agencies wish to "smart code" their IDs to have meaningful information in the ID. Conceptually, two different agencies could select the same coding string causing duplication. Consequently, each Project ID will need to have a characteristic to uniquely identify projects for each agency. The PROJECT_ID (Project / Grant chartfields) offers 15 alphanumeric characters. In FLAIR, the Project ID, Grant ID, and Contract ID are each five characters. The current recommendation is to use the first four characters to provide a "uniqueness" code for each agency, the values relating to the project owning agency. Delivered functionality enables auto numbering of the Project ID or end-user definition, but it does not provide the first four characters "smart code."

3.2 Description of New Functionality

A customization to allow a specific type of project ID schema will need to be developed. The modification will pre-populate the first four characters of the PROJECT_ID field with

the first four characters of the corresponding PC BU. This will be determined by retrieving the first four characters of the BU selected in the PROJECT_GENERAL search page. In the PROJECT_ID add mode, modify PeopleCode to allow user to enter only 11 alphanumeric digits in the PROJECT_ID field. Thus, PROJECT_ID will be a derived field combining the first four (4) PC BU characters with the 11 digits entered in add mode. The modification would require a change to the PeopleCode during the Save process on the PROJECT_ID field. Disable NEXT auto numbering functionality in the PROJECT_ID field. After the save process is complete, PROJECT_ID should function the same as delivered PeopleSoft functionality; being a 15 character field. There are three (3) navigation paths to the PROJECT_GENERAL search page. These will be listed in the Navigation Path section of this document.

This same modification will need to be developed in two additional pages. On the Copy Project Page (PC_CPY_DETL_PNL), modify PROJECT_ID_TARGET, allowing users to enter only 11 alphanumeric digits. Combine the first four characters of the selected Business Unit on the Copy Project page (PC_CPY_DETL_PNL) with the 11 digits entered in PROJECT_ID_TARGET to derive the 15 digit PROJECT_ID_TARGET field. Disable NEXT auto numbering functionality in the PROJECT_ID_TARGET field within PC_CPY_PROJ_WRK record. After the copy process (PC_CPY_PROJ_WRK.TEMPLATE_COPY) is complete, the field PROJECT_ID_TARGET should function the same as delivered PeopleSoft functionality; being a 15 character field.

The third page this modification needs to occur is on the Maintain Proposal Page: Projects Tab (GM_PROPOSAL_PROJ). Modify the SUB_PROP_NBR field to allow users to enter only 11 alphanumeric digits. Combine the first four characters of the selected Business Unit on GM_PROPSAL_PROJ page with the 11 digits entered in SUB_PROP_NBR to derive the 15 digit SUB_PROP_NBR field. Disable NEXT auto numbering functionality in the SUB_PROP_NBR field. After the save process is complete, SUB_PROP_NBR should function the same as delivered PeopleSoft functionality; being a 15 character field.

See GAP PG-08 (Project_ID Prefix Numbering) and process flow PG04 (Create a Project). Provide a reference to applicable level two process flows as follows; "See process flow XXXX".

3.3 Navigation path

PROJECT_GENERAL:

Project Costing > Project Definitions > General Information

Grants > Awards > Project

Customer Contracts > Determine Price > Related Projects and Rates

PROJECT_ID_TARGET :

Project Costing > Utilities > Copy Project

SUB_PROP_NBR :

Grants > Proposal > Maintain Proposal: Projects Tab

3.4 Set Up/Control Data

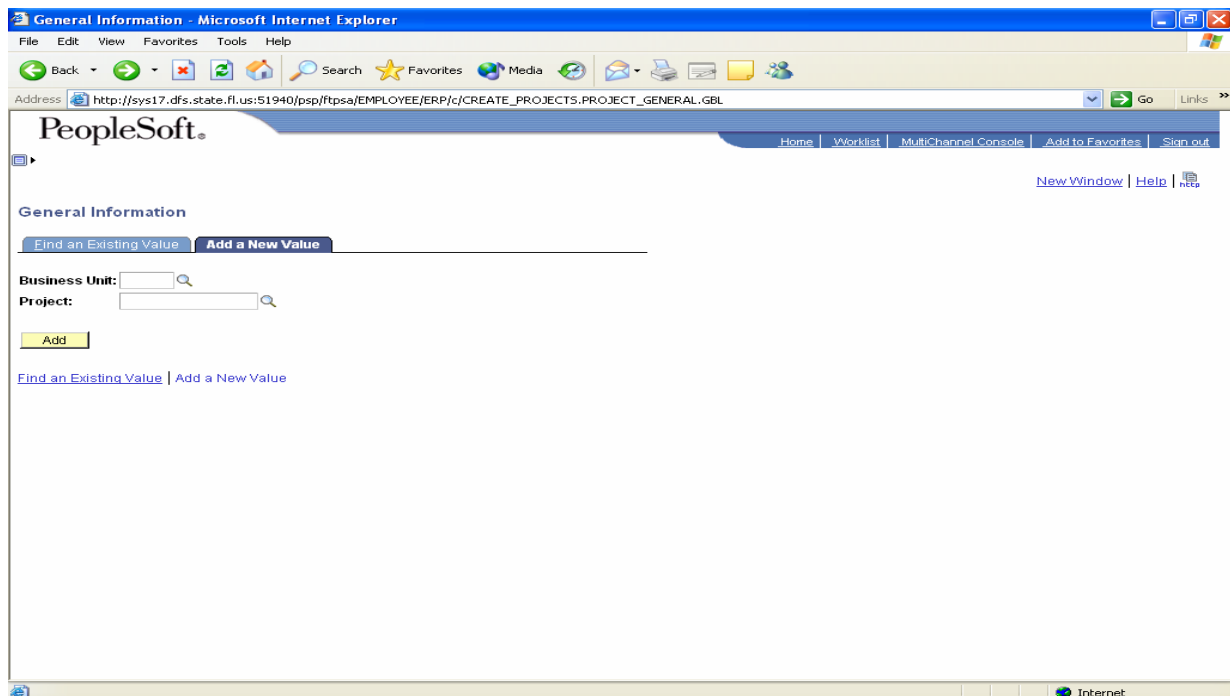
Pre-populate the first four characters of the PROJECT_ID, PROJECT_ID_TARGET, and SUB_PROP_NBR fields with the first three characters of the corresponding PC BU.

3.5 Application Changes (e.g., Pages, Components, Menus, Records, App Engines, SQRs, etc.)

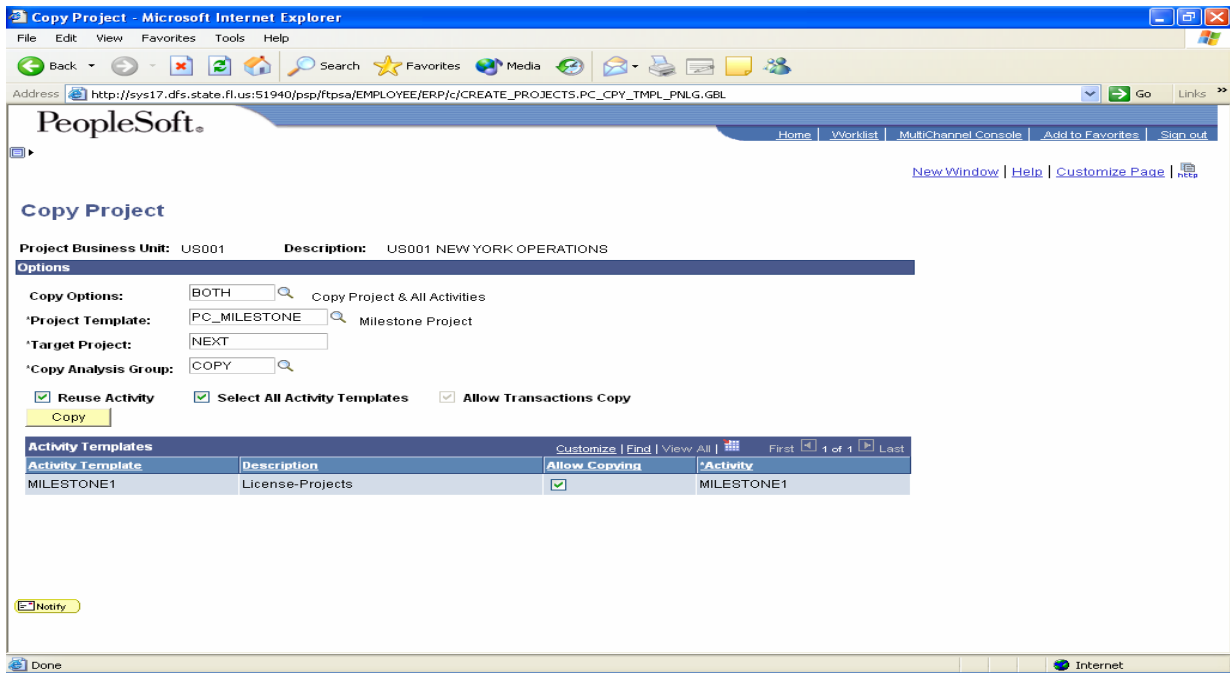
Project Costing > Project Definitions > General Information:

Grants > Awards > Project

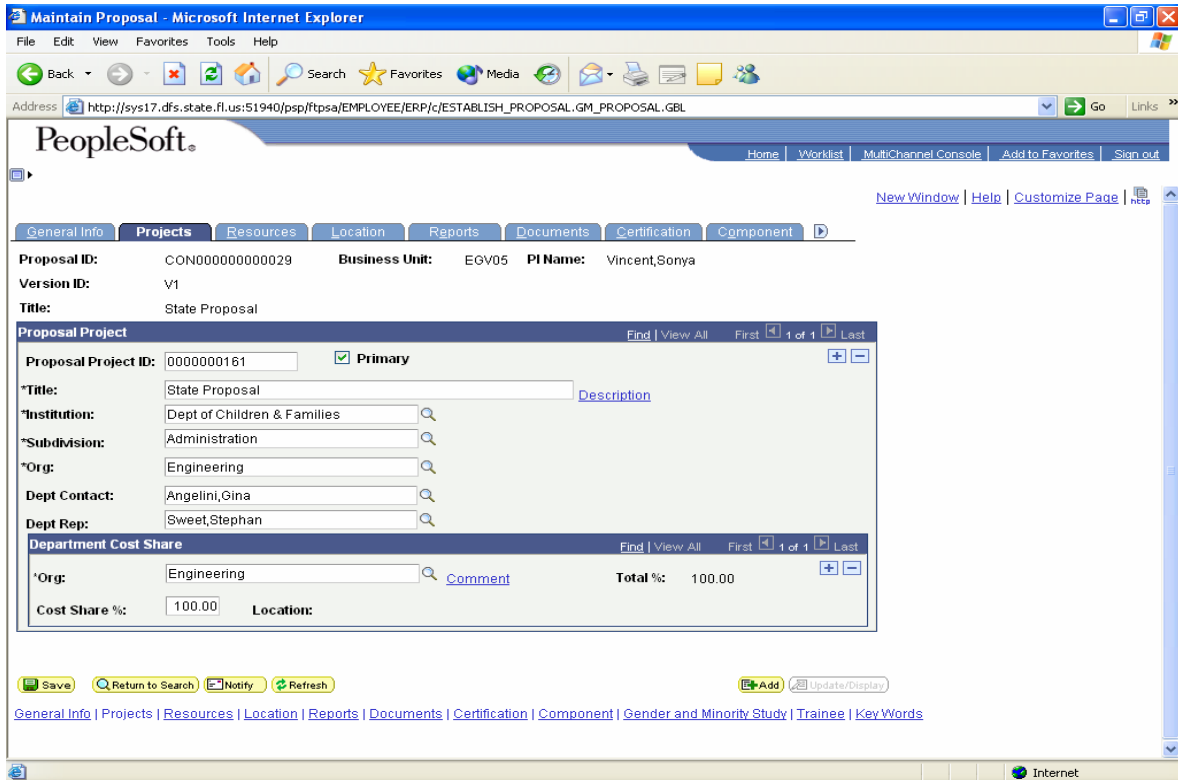
Customer Contracts > Determine Price > Related Projects and Rates



Project Costing > Utilities > Copy Project



Grants > Proposal > Maintain Proposal: Projects Tab



3.6 Unit Test Considerations

- Ensure agency Project ID's are up to 11 characters long. Aspire's PROJECT_ID, PROJECT_ID_TARGET, and SUB_PROP_NBR fields will include the first four digits of the agency's PC BU, thus there is a maximum of 11 characters available for agencies to populate these fields.
- After PROJECT_ID, PROJECT_ID_TARGET, and SUB_PROP_NBR are saved, these fields function the same as delivered PeopleSoft functionality throughout the Aspire system.

3.7 Miscellaneous

- Do not edit the actual PROJECT_ID, PROJECT_ID_TARGET, and SUB_PROP_NBR fields to be 11 characters; make sure they each remain 15 character fields.
- Run a validation to avoid duplicate Project_ID entries.
- Disable NEXT auto numbering functionality in the following fields: PROJECT_ID, PROJECT_ID_TARGET, and SUB_PROP_NBR.
- Training issue: ensure end-users know to enter only 11 characters in add PROJECT_ID pages.

3.8 Assumptions

- The first 4 characters of the PC BU will provide a uniqueness code for each agency in PROJECT_ID, PROJECT_ID_TARGET, and SUB_PROP_NBR fields.
- Agency Project IDs will have a maximum of 11 characters.
- Project Aspire will use the Proposals functionality within the Grants Module.