

3.0 Appendix B – Project Aspire Enhancement Functional Design

ADML ID	168
ADML Description	Row-level security and Inter-agency grants
ADML Tech #	162

3.1 Background

3.1.1 Functional Requirement

Permit or restrict access to the system, such as by:

- Organization
- Authorized function
- Accounting period (prior, current, and future, month and fiscal year)
- Available balance override by various functions and/or balance types

3.1.2 Delivered Functionality

PeopleSoft does not deliver row level security at the Project ID level.

3.1.3 Gap Description

Based on the State Chart of Accounts and requirements for row-level security at the BU and SetID level, a modification to ensure that inter-agency grants can be shared if necessary. When BU security is turned on at either the User ID or permission list level, end-users can only create transactions against their identified BUs. For purposes of inter-agency grants, the future state process is the utilization of Integration Templates to define access to shared Project IDs. The primary agency will associate an Integration Template that identifies what GL BUs can use a specific Project ID. This way, if DCF is the prime on a grant, they will set up an Integration Template that allows both DCF and AWI to use a Project ID.

3.2 Description of New Functionality

Project/Grants security is established at the Business Unit and Set ID level for each agency. All agency end users utilizing projects, grants and contracts functionality will be assigned security based on specified roles and permission list allowing them to perform their business processes and functions. Als

o, in conjunction with the user security set up, each project created will have an integration template business unit assigned to the project. This will only allow users to view other agency project/awards as indicated by the integration template. This will give agencies the ability to limit how data is accessed.

State agencies and departments are routinely required to access to other agencies project/awards in order to share project grant cost as required. In order to secure data transactions and limit the amount of information viewed between agencies, the secured views will need to be removed from row level security prompt tables and replaced with unsecured views. The secured views will be removed and replaced with unsecured view for all Projects related prompt edit views on the transaction pages in the Grants, Payables, Purchasing, and General Ledger modules. This will allow agency users access to other agencies project/awards.

The following is an example of the new functionality:

DCF creates a project/award with an integration template granting AWI access to the project/award. With the delivered PeopleSoft security view on the business unit, an AWI user would not be able to view or process transactions against the project created by DCF. Only projects/awards created with the AWI business unit would be accessible.

With the secured views removed and replaced with unsecured views, the AWI user will be able to view and process transactions against the DCF project/award.

3.3 Navigation path

The following are navigations and screen shots of the modules transaction pages that will be affected by removing the secured views and replacing them with unsecured views.

Project Costing module:

Based on the user's business unit row level security, all the views in the Projects Costing module will be affected when a user tries to setup or access another agencies projects/grants.





General Ledger module:


General Ledger>Journal Entry>Create Journal Entries> Line Tab> Click Project hyper link to access project/award information





Projects Information


Project Business Unit: 


Project: 

Activity: 

Source Type: 

Category: 

Subcategory: 

Analysis Type: 

Grants module:

Grants>Awards>Project Budget Inquiry


Menu


- ▼ Awards
 - Award Profile
 - Project
 - Project Activity
 - Project Budgets
 - **Project Budget Inquiry**
 - Negotiate Award
 - Process Facilities Admin
 - Create Continuation
 - Review Award
 - Modifications
 - FA Error Interactive Report
- ▷ Institutions
- ▷ Departments
- ▷ Professionals
- ▷ Sponsors
- ▷ Subrecipients
- ▷ Interactive Reports
- Grants Center
- My Proposals
- ▷ Program Management

Project Budget Inquiry

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Business Unit: = 

Project: begins with 

Budget Plan ID: =

Budget Type: =

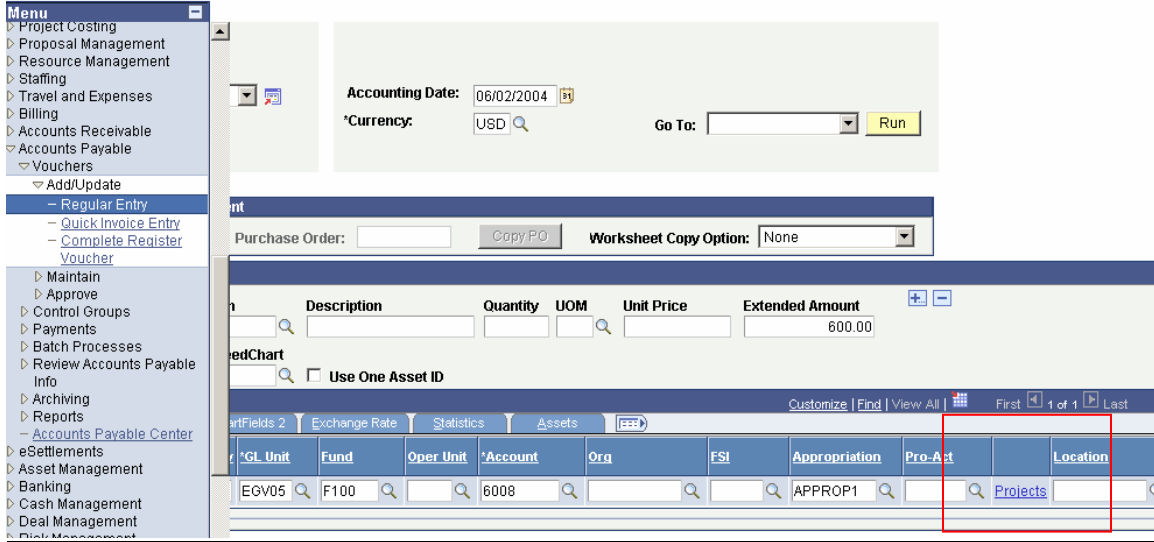
Description: begins with

Case Sensitive

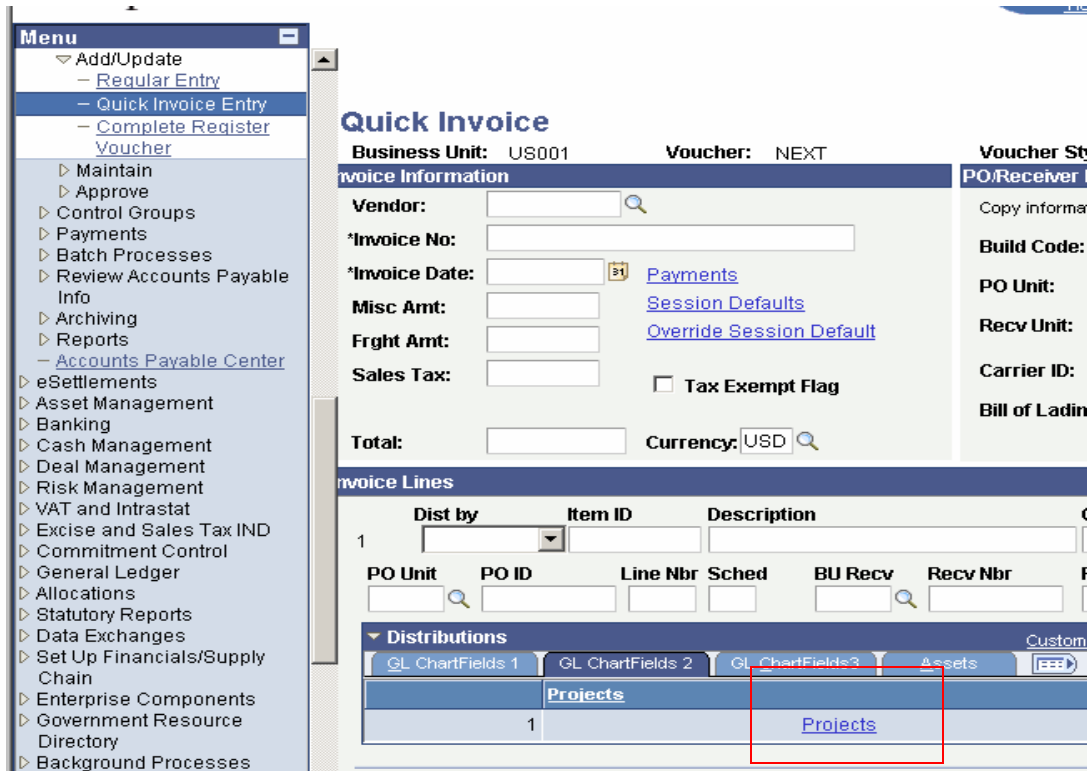
[Basic Search](#)

Accounts Payable module:

Accounts payable>Vouchers>Add/Update>Regular Entry



Accounts payable>Vouchers>Add/Update>Quick Invoice Entry



Purchasing:

Purchasing>Requisitions>Add/Update Requisitions

FS Code	Org	FSI	Approp	Pro-Act	Project	Location	AC 1	AC 2
	10000				Project			

Purchasing>Requisitions>Add/Update Contracts

Org	FSI	Approp	Pro-Act	Project	Location	AC 1	AC 2	AC 3
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="Project"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Purchase Orders> Add/Update PO's

Menu

- ▼ Purchase Orders
 - ▷ Stage/Source Requests
 - ▷ Acknowledgments
 - ▷ Manage Change Orders
 - ▷ Reconcile POs
 - ▷ Review PO Information
 - ▷ Reports
 - ▷ Budget Year End Processing
 - Add/Update Express POs
 - Add/Update POs
 - Approve Amounts
 - Approve CharFields
 - Reserve PO IDs
 - Maintain Distributions
 - Dispatch POs
 - Verify Document Tolerance
 - Budget Check
 - Entry Event Request
 - Create Backorders
 - Account Workflow

[New Window](#) | [Help](#) | [Customize Page](#) |

Purchase Order Inquiry

Distributions for Schedule 1

PO ID: 0000000002 Line: 1 Sched: 1 Item:

Status: Active Sched Qty: 1.0000

Distribute by: Amount Merchandise Amt: 50000.00 USD

Doc. Base Amount: 50000.00 USD

Distributions

Chartfields	More Details	Details/Tax	Asset Information	Req Detail	PEB					
Dist	Status	Percent	PO Qty	Amount	GL Unit	Entry Event	Fund	Oper Unit	Account	FS Code
1	Open	80.0000		40000.00 USD	EGV05		0103		6007	
2	Open	20.0000		10000.00 USD	EGV05		0192		6007	

Account	FS Code	Org	FSI	Approp	Pro-Act	Project	Location	AC 1
6007		10000		APPROP1		03CJ5A130016243		
6007		10000		APPROP1		03CJ5A130016243		

Purchase Orders > Add/Update Express PO's

Oper Unit	Account	FS Code	Org	FSI	Approp	Pro-Act	Project	Location
	6007		10000		APPROP1		03CJ5A130016243	
	6007		10000		APPROP1		03CJ5A130016243	

3.4 Set Up/Control Data

N/A

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

- The page name that will be affected/changed is PC_FIELDS
- The name of the secured view is SP_BUPCGL_CLSVW
- The name of the unsecured view is SP_BUPCGL_NONVW

3.6 Unit Test Considerations

Functional unit testing will consist of creating inter-agency transactions that allow or prohibit access to agency project/award data. This testing will encompass the Grants, Projects, General Ledger, Purchasing and Accounts Payable Modules.

3.7 Miscellaneous

N/A

3.8 Assumptions

- Delivered PeopleSoft security roles and permission list will be utilized.
- Project Integration Templates will be assigned to each project.
- State agencies will enter transactions between agencies.
- Creation and maintenance of Integration Templates will be managed by DFS personnel with security access the all business units.
- Based on the Integration Templates DFS end users will need security profiles that allow them access to all business units.
- The technical team will assess where and what impact this change will cause on the system or other program/people code.