

# 90.1 Create and Maintain Projects

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## Revision History

Version	Date	Revision Notes
1.0	11/18/2021	Draft
1.1	01/24/2022	Updates per Financials Wave Module Workgroup Sessions

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## General Information

This document describes and depicts the process steps and supporting information for the identified State of Florida financial management business process. This information should be read in conjunction with the Business Process Flow Diagrams.

The Dependencies and Constraints section describes any conditions or criteria that impact how or when the business process should be executed. These could be set within Florida PALM or from external sources (i.e., Law or Rule).

The Business Process Overview section summarizes the business process and provides context for understanding the objectives and desired outcomes of the described business process.

Within the Business Process Flow Details section, included for each process step are:

- **Process Step ID** – A unique number assigned to each process step, which corresponds to the Business Process Flow Diagram
- **Process Step Title** – A short description assigned to each process step, which corresponds to the Business Process Flow Diagram
- **Description of Process** – A detailed narrative description of the process step, which provides additional information and context for understanding the process step

Florida PALM screenshots are included within the sections following the Business Process Flow Diagrams to allow connections to be made from specific business subprocess steps to screens within Florida PALM.

Also described below are the Ledger Impacts, Interfaces and Key Reports, which are displayed as icons on the Business Process Flow Diagrams. Ledger Impacts describe where there is an update to one of the ledgers used to track activity for accounting, budget management, or financial reporting purposes. Reports describe where a report is identified to be produced at a particular process step or is used to support the completion of a process step. Interface IDs are provided for each interface identified on the Business Process Flow Diagrams.

Tables are included to identify the Conversions, Forms, Workflows, and Stakeholder Configurations related to this Business Process. These items may not be included within the Business Flow Diagrams, however, these items are important elements of each Business Process as a whole.

Finally, included in the Terminology section are definitions of terms to help the reader to better understand the document. These are terms that are used within this document that may be new or that require a description for common understanding.

## Dependencies and Constraints

- Expense transactions that utilize a Fixed Capital Outlay (FCO) Category (14\*\*\*\*, 08\*\*\*\*) will require a valid Project ChartField value to be included on the transaction.
- Agencies will establish Sponsored Projects within the Grants Module
- Projects require at least one activity to be established
- State agencies are responsible for maintaining accounting records necessary for the effective management of their programs and functions

## Business Process Overview

This business process addresses the set up and maintenance of Projects and the associated Project ChartField for fiscal management. This business process is within the Project and Grants Management (PGM) Business Grouping. PGM includes a collection of business processes which:

- Manage reporting and analysis of Operating and Capital Projects;
- Manage administration of Grant Awards and associated Sponsored Projects; and
- Support F&A (indirect costs) processing, Sponsor billing and Federal Financial Reporting.

This business process supports the establishment and identification of operating and capital projects which are not related to a grant, referred to as Non-Sponsored Projects. This process also supports tracking of expense and revenue transactions for reporting and analysis purposes.

The business subprocesses include:

- 90.1.1 Establish Project
- 90.1.2 Monitor and Closeout Project

Florida PALM Project Costing module consists of additional Project Specific ChartFields that can be used on a transaction to further classify and categorize a project transaction. These fields include Project Source Type, Project Category, and Project Subcategory. Users will use these and other Project Costing specific fields, to report on project budgets, costs, and revenue.

Sponsored Projects, or projects related to a Grant, are established within the Grants module. These projects can be viewed and reported on via the Project Costing and Grants modules, however, Sponsored Projects information are maintained through the Project Costing module, while their budget details are maintained within the Grants module.

## Business Process Flow Details

The tables below describe steps in each business subprocess as reflected on the Business Process Flow Diagrams. The tables also reflect information associated with each step describing the intent of the specific process.

The Business Process Flow Diagrams use horizontal swim lanes to depict where activities are performed by different parties or systems. Each swim lane is titled with a role, either an agency - based or within Department of Financial Services (DFS), and in some cases, are representative of an external entity or system. The swim lanes may change from page to page within a single business subprocess as more or fewer roles are required to execute sections of the business subprocess. Optionally, the process flow diagram may reflect vertical swim lanes to further designate information such as systems or time intervals.

### 90.1.1 – Establish Project

Table 1: Create and Maintain Projects

90.1.1 – Establish Project	
<b>Module</b>	<b>Project Costing</b>
<b>Related Module(s)</b>	<b>Grants Management, General Ledger, and Commitment Control</b>

<b>Swim Lanes – Definition</b>	<p><b>Agency PC Processor:</b> agency role responsible for entering Project information and establishing the Project Budget within Florida PALM</p> <p><b>Agency PC Maintainer:</b> agency role responsible for reviewing and approving a Project’s information and budget</p>
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Process Step ID	Process Step Title	Description of Process
1	Identify a need for a Project	<p>The Agency PC Processor identifies a need for a new Project ChartField value. Projects within Florida PALM represent an activity, or set of activities, needed to accomplish a goal or objective and have a defined start and end date.</p> <p>Expense or Revenue transactions that utilize a Fixed Capital Outlay Appropriation Category of 14**** or 08**** will be required to include a Project ChartField and activity in the distribution lines of the transaction.</p> <p>If the project is related to a Grant Award, the Project must be established within the Grants module through 90.2.1 Establish Award Profile subprocess.</p>
2	Enter General Project Information	<p>The Agency PC Processor can create a Project online by direct entry of data, use of a Project template, or copying an existing Project. For FCO project types, agencies MUST utilize the FCO project template to enable statutorily mandated tracking and reporting.</p> <p>The Agency PC Processor enters general project information on the Project Definition page, which includes the Project title, description, type, start date, and end date.</p>
3	Create Project Activity(ies)	<p>The Agency PC Processor will associate Activities to the Project. Each project must have at least one activity associated with it and the activity is a Project Costing ChartField that will be required on all project related transactions.</p>
4	Define Project Budget	<p>The Agency PC Processor will create Project budget within the Project Costing module that represents the lifetime financial plan for the project. Project budgets are established at the activity level and roll up to provide the project total. The Chart of Accounts values and amounts are assigned at the Activity Level through the budget detail page</p> <p>Budget details entered within the Project Costing module are used to create budget journals within the Grants and Projects ledgers in the</p>

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Process Step ID	Process Step Title	Description of Process
		<p>Commitment Control module; These ledgers are independent of the Appropriations Budget ledgers. Agencies are responsible for ensuring their FCO Project budgets do not exceed available appropriation balances. PCR015 Project Budget vs. Appropriation Budget report is available for monitoring these two ledger balances.</p> <p>FCO projects are required to establish budgets within the standard activities configured for that project type within Florida PALM, to ensure appropriate reporting during Certified Forward as required by Section 216.301, F.S.</p>
5	Review Project Budget Plan	<p>The Agency PC Maintainer will review the project budget plan and details to ensure it is in line with all internal and external policies.</p> <p>Agency PC Maintainer will work with their Agency budget office to ensure the appropriate budget information is used.</p>
6	Inbound Project Details	<p>Florida PALM will receive data from Agency Business Systems (ABS) to create new and update existing Projects. The project details are submitted from the ABS through Inbound Project Details to Florida PALM.</p>
7	Load Project Information	<p>The project information is loaded into Florida PALM via an automated process which performs an edit check to ensure Chart of Accounts (COA) and other configured values are valid prior to adding to the Project Costing tables.</p>
8	Finalize Project Budget	<p>The Agency PC Maintainer will approve the project by finalizing the Project budget. Several events are associated with the budget finalization such as, generating Project budget journals within the Grants and Project Budget Ledger, creation of Project budget rows within the Project Costing module's transaction tables and the activation of the ChartField value that is to be used on transactions.</p> <p>Agency PC Maintainer is responsible for reviewing any budget exceptions that resulted from the finalization of the budget using the Review Commitment Control page within the Project Costing module. The Agency PC Maintainer should work closely with their Agency budget office to verify the information used to create the Project budget.</p>

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Process Step ID	Process Step Title	Description of Process
		<p>The Project ChartField effective dates (start and end dates) are represented by the Project Start and End dates entered within the project general information page.</p> <p>The Agency PC Maintainer will determine if an Allotment is needed for the project per internal business policies. Allotments are established using the 20.1.2 Manage Agency Allotments subprocess.</p> <p>The Agency PC Maintainer will determine if the project needs to be added to a Project Tree. Project trees are established through the 10.1.5 Set up and Maintain Trees and Combo Edits.</p>
9	Outbound Project Information Extract	Project information is interfaced with Agency Business Systems via the Outbound Project Information Extract Interface.

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Project 4300FCO15356888 Add to My Projects

\*Description **Lab 2 Construction**  Program Processing Status Active  
 Project Status: Active

\*Integration **43000** Dept of Financial Services

Project Type  Percent Complete  As Of

Project Health  As Of

**Project Schedule**

\*Start Date **07/01/2021** \*End Date **09/30/2022** Additional Dates

**Description** Find | View All First 1 of 1 Last

Date/Time Stamp 11/10/21 11:32:54AM User ID

Description:  
 254 characters remaining

Long Description:

Save as Template Copy Project

My Projects Project Valuation Project Team **Project Activities** Go To

Save Return to Search Previous in List Next in List Refresh Add Update/Display

Figure 1: Project General Information Page

Budget Detail

Project 4300FCO15356888 Description Lab 2 Construction  
 Plan ID 1 Description FCO Budget Lab 2  
 Currency Code USD Charging Level Detail  
 Calendar ID AN Number of Periods 1  
 Analysis Type BUD  
 Budget eligible for finalization  
 Budget not eligible for finalization

Distribute Budget Add To/Subtract From Expand All Subtasks Filter Budget Item Search

**Project Budget Details** Personalize | Find | First 1-6 of 6 Last

Status	WBS ID	Activity Name/Budget Item	Budget Items	Spread Option	Percent	Budget Adjustment	Distributed Budget	Target Budget	Undistributed Adjustment	Even Spread	Other	2022
✓		FCO Budget Lab 2		Select Spread		0.000	100,000,000	100,000,000	0.000			
	1	<b>Survey</b>		Select Spread		0.000	75,000,000	75,000,000	0.000			
✓		<b>Consultant Services</b>				0.000	25,000,000	<b>25,000,000</b>	0.000	Even Spread	Other	25,000,000
✓		Salaries & Wages				0.000	50,000,000	50,000,000	0.000	Even Spread	Other	50,000,000
✓	2	Design		Select Spread		0.000	25,000,000	25,000,000	0.000			
✓		Salaries & Wages				0.000	25,000,000	25,000,000	0.000	Even Spread	Other	25,000,000

Distribute Budget Copy From Another Plan

Go To: Budget Plan Budget Items Budget vs. Actual Project Activities Process Monitor

Save Return to Search Previous in List Next in List Notify Refresh Update/Display Include History

Figure 2: Project Budget Periods Page

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Figure 3: General Ledger Detail Page

### 90.1.2 – Monitor and Closeout Projects

Table 2: Reporting, Monitoring and Project Closeout

90.1.2 Monitor and Closeout Projects		
Module	Project Costing	
Related Module(s)	Grants Management, General Ledger, Accounts Payable, Accounts Receivable, Purchase Orders, and Billing	
Swim Lanes – Definition	<b>Agency PC Processor:</b> agency role responsible for establishing and monitoring project data. <b>Agency PC Maintainer:</b> agency role responsible for updates to the project budget.	
Process Step ID	Process Step Title	Description of Process
1	Project Cost Collection	The Project Cost Collection process will be scheduled via batch process. This process captures expenditure data from the General Ledger module and Accounts Payable module and feeds it to the Project Costing module.
2	Project Management Activities	Project management activities such as monitoring and working with contractors, occur outside of the system.
3	Review Project Financials	The Agency PC Processor will monitor Project financial activities using a variety of Florida PALM online screens and reports.  Corrections to project transactions must be completed within the source modules.
4	Update Budget Plan	If corrections are needed to the project budget the Agency PC Processor will update the Budget details within the project budget plan. The Agency PC Maintainer will review the updated budget plan and re-finalized the budget plan.
5	Review Budget Plan	The Agency PC Maintainer will review the new Budget Plan and work with Agency Budget staff to ensure the appropriate Commitment Control ledger and COA values are used in the budget plan.
6	Finalize New Budget Plan	The Agency PC Maintainer will re-finalize the budget, as appropriate.

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Process Step ID	Process Step Title	Description of Process
		<p>After the Budget Plan is updated, the Agency Project Processor will run the reports again to ensure the newly updated budget is correct.</p>
7	Review FCO Projects	<p>Request for Certifications of FCO Appropriations is statutorily required for all FCO appropriation balances, regardless of type or year in which the appropriation was made; all balances will be reviewed and are subject to reversion. Agencies funded with FCO appropriations are required to reconcile project balances and related activities in the Project Costing module to appropriation balances maintained in the Commitment Control ledger in support of the Request for Certifications FCO appropriations. PCR015 Project Budget vs Appropriation Budget report will be available for agencies to compare their Project budgets to the appropriation budgets.</p> <p>Any variance between the Appropriations ledger and the FCO Project budgets will be considered a request for reversion. Therefore, any appropriation balance that is to be requested Certified Forward, must be obligated to a Project within a related FCO project activity. Agencies may utilize PCR013 FCO Certified Forward Request Detail Report to review the FCO Project and details that will be used to establish the Request for Certifications FCO appropriations through Commitment Control within the 20.3.1 Carry Forward subprocess.</p>
8	Generate Year End Reports	<p>During year end, Agencies have several reports and inquiry screens available to review their project financial data. For Financials Wave, Project Costing will provide summary reports that include life to data balances. For detailed reports, users would utilize the available reports within the appropriate source module.</p>
9	Review for Financial Closure	<p>If a project needs to be closed, the user will review the financial information available through online screens and reports to ensure all activities are closed, sponsored project billing/draws are complete, obligations have been liquidated and final corrections are completed.</p> <p>Sponsored Projects require all billing and/or draws to be completed prior to closing the project. Users can utilize the Grants Portal, AR Deposit Report, and other module specific reports to view project revenue information.</p> <p>All obligations for the project must be liquidated prior to closing. Outstanding obligations can be identified by the Encumbrance Detail report or by viewing the Purchase Orders by Activity page within Florida PALM. Any outstanding obligations should be addressed through 30.2.1 Create and Maintain Encumbrances.</p>

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Process Step ID	Process Step Title	Description of Process
10	Update Activity Status to Closed	The Agency PC Processor will update the Project's activities to reflect closed.
11	Update Project for Closeout	Agency PC Processor will update the Project to reflect all pre-closeout activities are complete and ready for Agency PC Maintainer to close.
12	Update Project End Date and Status	The Agency PC Maintainer will update the Project's end date to reflect the official closing date and update the Project's status. Upon update of the Project status, the project will no longer be available for use on transactions.
13	Outbound Project Information Extract	Updates made to the project details will be made available to agencies via an outbound interface.

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## Ledger Impacts

Table 3: Ledger Impacts Included on Business Process Flow Diagrams

Ledger Impact ID	Ledger - Ledger Impact Title	Ledger Impact Description
LI1	Projects Ledger	Increases Project Balance

## Key Reports

Table 4: Reports Included on Business Process Flow Diagrams

Report Number	Report Description	Report Frequency	Audience
R1	<b>GLR091 - ChartField Value Report</b> — Listing of ChartField values established.	On Demand	Agencies
R2	<b>PCR010 - Budget Cost Review by Period</b> — A report that includes budget to cost variance per each budget item per each period of the project	On Demand	Agencies
R3	<b>PCR001 - Project Summary with Details Report</b> — A report that displays historical summaries with drill down to detailed data for Revenue, Encumbrance and Expenditure amounts by month, quarter, and year for the life of the project.	Periodic	Agencies
R4	<b>PCR022 - PC Unpaid Vouchers Report (WorkCenter)</b> — A report to view transactions for active projects that have a voucher ID, but the voucher is not paid.	On Demand	Agencies
R5	<b>PCR025 - Blank Project Type Report (WorkCenter)</b> — A report to view active projects for which the project type is not assigned a value.	On Demand	Agencies
R6	<b>PCR008 - Project Expenditures Report</b> – A report that lists project expenditures by COA ChartField combinations and includes project specific data elements.	Periodic	Agencies
R7	<b>PCR021 - Projects Expiration Report</b> — A report that displays all Projects with the closeout expiration end date.	Periodic	Agencies
R8	<b>PCR029 - Project Transaction Report</b> — Report that displays a transaction summary of all projects by analysis type, source type, category, and subcategory.	Periodic	Agencies
R9	<b>PCR013 - FCO Certified Forward Request Detail Report</b> — A detailed report which includes all FCO appropriation balances, including projects and activity balances, agencies have requested for certified forward.	Periodic	Agencies
R10	<b>PCR015 - Project Budget vs. Appropriation Budget Report</b> — Report	Periodic	Agencies

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	that compares the Project Budget captured within the Project Costing module to the Appropriation ledger balances.		
R11	<b>PCR004 - Expense and Revenue by ALN/CSFA Report</b> — A report that displays summary of expenses and revenues by ALN/CSFA numbers.	Periodic	Agencies, DFS
R12	<b>GLR099 - Trial Balance Report</b> – Report that lists debit and credit activity by Chartfield and date. <b>GLR099 - Trial Balance Report</b> – Report that lists debit and credit activity by ChartField and date.	On Demand	Agencies
R13	<b>KKR008 - Schedule of Allotment Balances Report</b> – Report which provides an accrual basis budget report within an expenditure category and account code for recorded allotments, encumbrances, expenditures, and remaining balances. The report is grouped by Fund and/or Budget Entity and available at designated time periods by ChartField combinations.	Periodic	Agencies
R14	<b>POR003 - Encumbrance Detail Report</b> – A list of all encumbrances with detailed data.	Periodic	Agencies
R15	<b>PCR007 - Open Activities by Project Report</b> — A report that displays all open activities for each project.	Periodic	Agencies
R16	<b>ARR007 - Deposit Report</b> – A report that provides detailed information about deposits.	Periodic	Agencies
R17	<b>PCR014 - Funding Source Indicator (FSI) Report</b> — A report focusing on grant and other expenditures used to assign a funding source indicator for budgeting purpose.	Annual	Agencies
R18	<b>PCR023 - Missing Journal Analysis Type Report (WorkCenter)</b> – A report to view GL Journals that have been posted and contain active Project IDs that are missing an Analysis Type.	On Demand	Agencies
R19	<b>PCR031 - Project Funds Distribution Report</b> – Report that displays various amounts for a project or appropriation such as the amount funded, spent, remaining, and collected.	On Demand	Agencies
R20	<b>PCR033 - Project Flexible Analysis Type Report</b> – A report that displays transactions based on Analysis Groups	On Demand	Agencies

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R21	<b>PCR032 - Project Budget Variance</b> – a report that shows the project budgets that have a variance between PC budget and the Grants and Projects Ledger in Commitment Control	On Demand	Agencies
R22	<b>APR049 - Project and Contract Expense Summary Report</b> – A report of project and contract payment information by month, quarter, fiscal, and calendar year, inception to date, or time-period with the ability to export data into an excel format.	On Demand	Agencies

**Note:** A complete list of reports may be found in the [Reports Catalog](#)<sup>1</sup>.

## Conversions

Table 5: Data Converted from External System to Florida PALM

Conversion Number	Conversion Description	Conversion Frequency	Source
PCC001	<b>Projects (for Accounting Purposes)</b> — Conversion of titling and administrative information required to manage active projects that are authorized for continued use.	One-time	DFS Enterprise System, Agency Business Systems
PCC002	<b>Project Life-to-Date Balances</b> — Conversion of life-to-date balances for active projects.	One-time	DFS Enterprise System, Agency Business Systems

**Note:** A complete list of conversions may be found in the [Catalog of Conversion Offerings](#)<sup>2</sup>. This is a protected publication that requires login. If your business or technical teams do not currently have access to the Smartsheet Florida PALM Dashboard, contact your Readiness Coordinator to request their access.

## Interfaces

Table 6: Interfaces Included on Business Process Flow Diagrams

Interface Number	Interface Description	Interface Frequency	Source	Target
PCI001	<b>Outbound Project Information Extract</b> — Outbound interface containing an extract of project information to agency business systems.		Florida PALM	Agency Business System
PCI006	<b>Inbound Project Details</b> — Inbound interface containing Project details from agency		Agency Business System	Florida PALM

<sup>1</sup><https://app.smartsheet.com/b/publish?EQBCT=a8d51896f0144ef6a87314b3c7824ba5>

<sup>2</sup><https://app.smartsheet.com/dashboards/xW9gQgMRP6w5pfRGMQGjh4wvP676gf2h4mf57hP1>

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Interface Number	Interface Description	Interface Frequency	Source	Target
	business systems to Florida PALM.			

**Note:** A complete list of interfaces may be found in the [Catalog of Interface Offerings](#)<sup>3</sup>. This is a protected publication that requires login. If your business or technical teams do not currently have access to the Smartsheet Florida PALM Dashboard, contact your Readiness Coordinator to request their access.

## Forms

Table 7: Forms Included on Business Process Flow Diagrams

Form Number	Form Description	End User Role
N/A		

## Workflows

Table 8: Workflows Included on Business Process Flow Diagrams

Workflow Number	Workflow Description	End User Role
N/A		

## Agency Configurations

Table 9: Configurations Defined and/or Maintained by Agencies

Configuration Number	Configuration Description	Frequency
C-PC003	<b>Standard Activities</b> – generally represents a task that makes up a Project. Project Costs and Budgets are stored in Activities.	One Time
C-PC020	<b>Project Team Roles:</b> represent the job title within the project for different team members.	One Time
C-PC005	<b>Activity Types</b> – Used to group activities together to facilitate analysis and reporting on similar activities across projects.	One Time
C-PC026	<b>Source Type</b> – Used to further define a project transaction	As Needed
C-PC037	<b>PC Category</b> – used to further define a source to provide flexibility in defining a project transaction	As Needed
C-PC038	<b>PC Subcategory</b> – used to further define a source to provide additional flexibility in defining a project transaction.	As Needed

<sup>3</sup> <https://app.smartsheet.com/dashboards/xW9gQgMRP6w5pfRGMQGjh4wvP676gf2h4mf57hP1>



## Terminology

**Activities** – specific tasks associated to a Project and where transactional data gets recorded and monitored.

**Analysis Type** – assigned to individual transactions to identify the different types of transactions, such as budgeted amounts, actual costs, and billed costs. For a single transaction, the Analysis Type can change as the transaction flows thru the system and is used to reflect the nature of the transaction data as it flows thru the system.

**Award Contract** – written agreement between a State Entity and the Grant Award's sponsor, defines the relationship between Awards and Projects, and establishes billing or Letter of Credit draw limits.

**Budget Item** – value used to classify budget items into specific classification categories such as Equipment, Consultant Fees, Personnel, Supplies, Travel, or Sub Award.

**Fixed Capital Outlay (FCO)** – an appropriation category used to fund real property (e.g., land, buildings) including additions, replacements, major repairs, and renovations to real property which materially extend its useful life or materially improve or change its functional use.

**Grant Award** – funding received from an external source that has a budget, a defined Period of Performance (start and end dates), requires a way to collect the funds (LOC or Billing) and reports expenses and cash received to the Sponsor.

**Non-Sponsored Project** – any project that is not directly associated with a Grant Award.

**Project** – an activity or collection of activities, with a defined start and end date designed to achieve a specific goal, outcome, or program objective.

**Project Budgets** – Project Budgets are Cost budgets that are distributed to Project Activities and Budget Items across time periods for budgetary or project performance measurement and represent the total life to date cost of the project. Project Budgets are independent of Appropriations budget.

**Project ID** – a ChartField Value used to isolate, track and analyze transactions for a specific purpose, often across multiple fiscal years.

**Project Transaction** – Project Transactions represent the cost, revenue or budget amounts defined for and collected in a Project.

**Project Tree** – Project Trees define how Projects are related to each other. A Project can be hierarchically related to as many projects as necessary to achieve the necessary degree of cost tracking and analysis.

**Sponsored Project** – A project that is associated to a Grant Award and is established directly within the Grants module.

**Summary Project (Program)** – A project established at the top of Project tree to which all other trees can be rolled up to for summary reporting. Activities cannot be assigned to a project

designated as a summary project and is reserved for creating Project Trees used for Statewide reporting.

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