

NC STATE UNIVERSITY



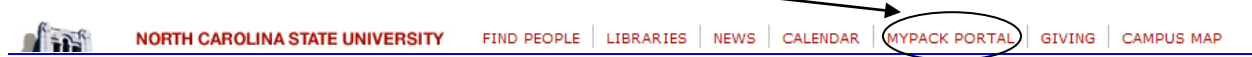
Financial System

Project / Speed Type Inquiry 9.1 Financial System

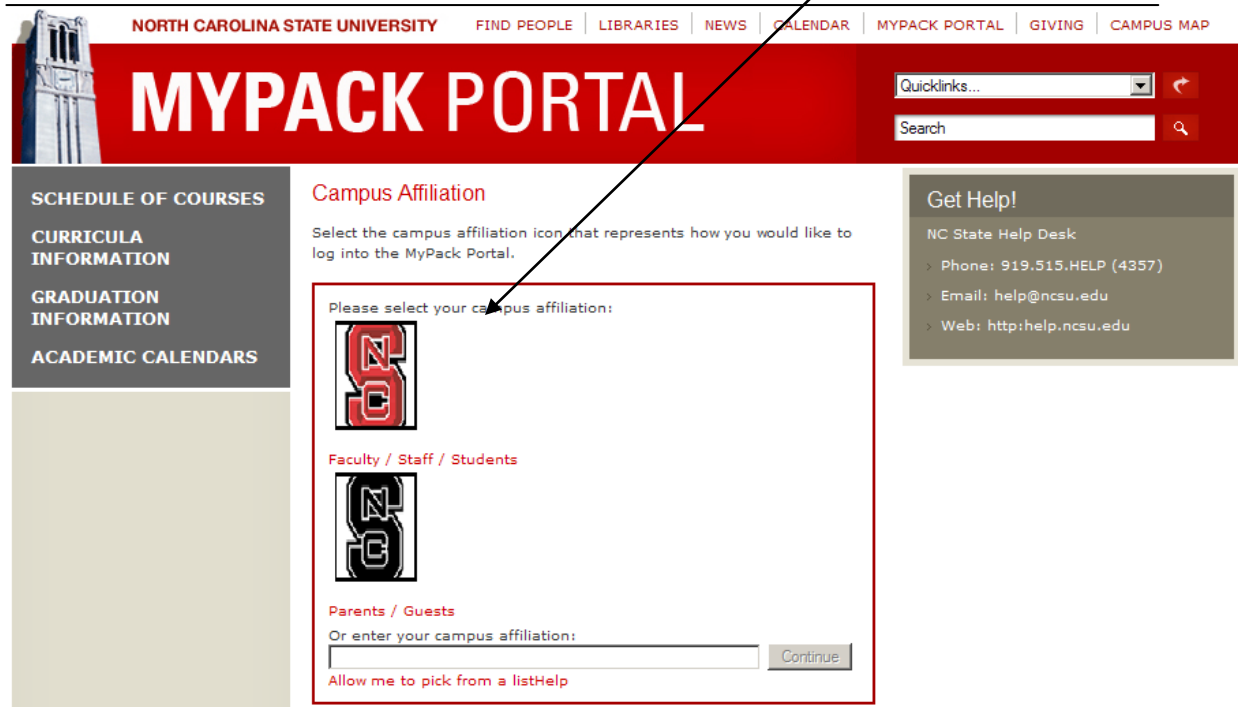
Project/SpeedType Inquiry

Step 1: Access the Financial System

Using an Internet browser, access the Financial System using the NC State MyPack Portal at the following URL: <http://www.ncsu.edu/>



Then, select **Faculty / Staff / Students** as the Campus Affiliation



Next, complete the secure login information

Shibboleth - Secure Login



1. Enter your **Unity User ID** and **Password**.
2. Click the **Login** button.

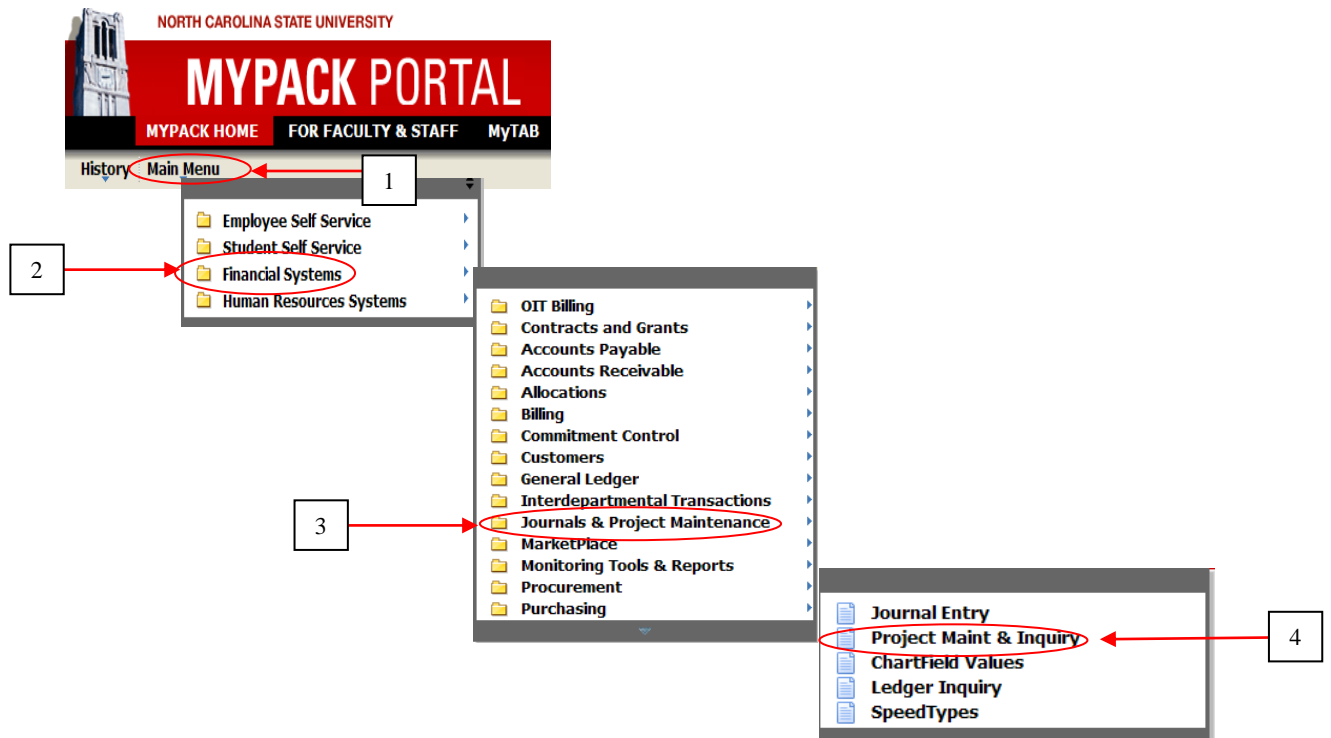
Forgot your [Unity ID or Password?](#)

[Verify this page](#) is hosted by NC State University

Step 2: Navigate to the Project Attribute Page

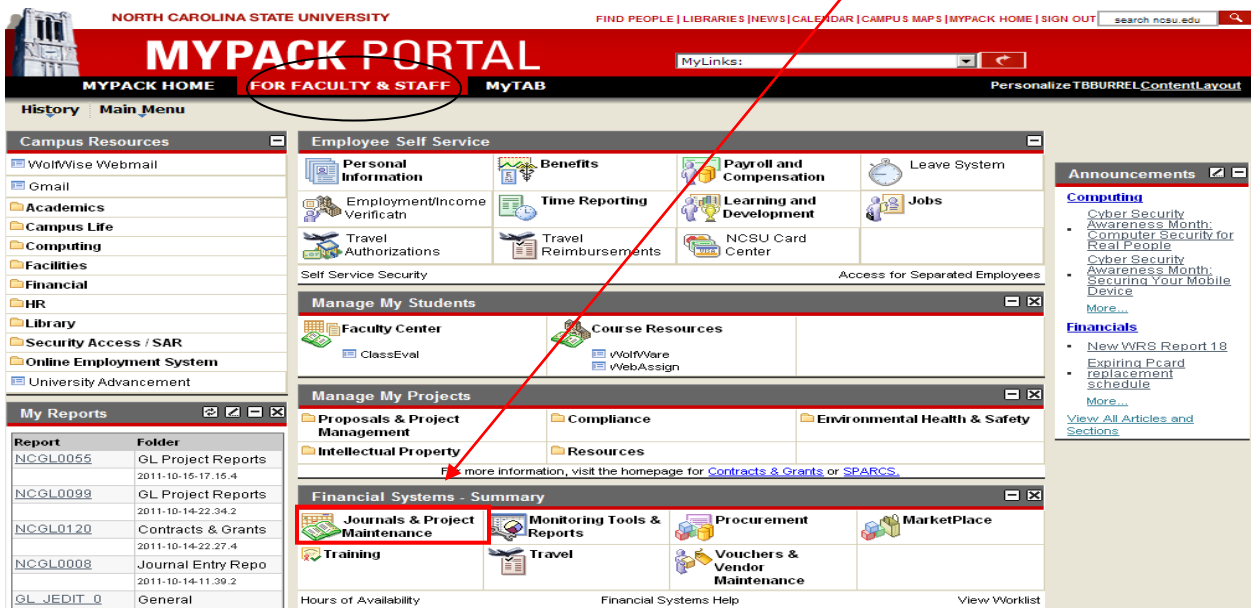
There are several ways to navigate to the Project Maintenance page:

- 1) Using the Main Menu on the MyPACK Portal Home page, click on Financial Systems



then click on Journals & Project Maintenance and click on the Project Maint & Inquiry item or click on the **SpeedTypes** link to inquire on SpeedTypes, OR

- 2) Click on the **FOR FACULTY & STAFF** tab and click on the **Journals and Project Maintenance** item in the **Financial Systems - Summary** section,



then click on the Project Maint & Inquiry item

Projects

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


[Find an Existing Value](#) [Add a New Value](#)

SetID:

Project ID:

Project/Grant Type:

Include History Correct History

[Basic Search](#)  [Save Search Criteria](#)

[Find an Existing Value](#) | [Add a New Value](#)

You can search for existing **Projects** by entering specific search criteria. There are several search fields (SetID, Project, Project/Grant Type) available that can be used to help narrow your search. You can also change the operator (begins with, contains, =, >=, <=, between, etc.) to further define your search criteria.

Enter Search Criteria:

Enter the **SetID** equal to "SHARE"

Enter the **Project ID** that you want to view

Enter the **Project/Grant Type** (Project Reference, Project Segment, or Project Phase) or leave blank

Check the Include History box if you want to see all rows of data

Click the button

Project IDs that meet your search criteria will display on the lower portion of the page. The search function can retrieve up to 300 Projects. Click on the project that you want to view.

Projects

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


[Find an Existing Value](#) [Add a New Value](#)

SetID:

Project ID:

Project/Grant Type:

Include History Correct History

[Basic Search](#)  [Save Search Criteria](#)

Search Results

Only the first 300 results can be displayed. Enter more information above and search again to reduce the number of search results.

[View All](#) First 1-100 of 300 Last

SetID	Project ID	NC Effective	Status	Project/Grant Type	Description
SHARE	532031	Inactive		ProJ Seg	DEFECT GENERATION
SHARE	532039	Inactive		ProJ Seg	STRATOSPHER AEROSOL
SHARE	532120	Inactive		ProJ Seg	MICROPBVT SILICON

If there is only one Project that meets the specified criteria, that Project will automatically display.

The **General/Chartfields** page is applicable to all projects. It includes the general attributes as well as chartfield information. **Note:** There is limited attribute information for Project References. Click the View All link and scroll to view all rows of data.

General/Chartfields Foundations Contracts & Grants Principal Investigators CI Facilities

SetID: SHARE Project ID: 221241 Project/Grant Type: Project Segment

General/Chartfields Find View All First 1 of 1 Last

*Effective Date: 07/01/2011 *Effective Status: Active Project Reference: 015160 *Central Office Owner: Budget Office

Responsible Person: VC FOR RSRCH, INNOV & ECON DEV Description: ECONOMIC DEVELOPMENT Project Start Date: 01/01/1901 Project End Date: 12/31/2099

Long Description: ECONOMIC DEVELOPMENT/ACADEMIC AFFAIRS/COMMUNITY SERVICES

Chartfield Information

*Fund Code	*Department	*Program	*Class	*NCAS Fund	NCAS Company	Gen Compliance Review
16030	061301	142	212	1142	U300	<input type="checkbox"/>
				GASB33	*Trust Fund Code	*Exempt Trust Status
				<input type="checkbox"/>	99	0
Sales and Service Information				GASB	F & A Cost Code	Spec Dept Reporting
Type:	Effective Month / Year	<input type="text"/>	<input type="text"/>	4110	<input type="text"/>	<input type="text"/>
	Expiration Month / Year	<input type="text"/>	<input type="text"/>	Gift Reporting	Unrelated Bus Inc Tax	
				<input type="checkbox"/>	<input checked="" type="checkbox"/> Reconcile	<input type="checkbox"/>
Auxiliary Information				Stimulus Type	Stimulus Reporting	
Code:	<input type="text"/>	Type:	<input type="text"/>	<input type="text"/>	<input type="text"/>	
				STIF Interest	STIF Project	
				<input type="checkbox"/>	<input type="text"/>	

Last Update User ID: LLNICH02 07/01/2011 4:44:33PM

The **Foundations** page consist of additional attributes applicable to Project Segments that begin with '6'. The **Contracts & Grants** page consist of additional attributes applicable to Project Segments that begin with '5'.

Speed Types

SpeedTypes

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

Find an Existing Value

SetID: = SHARE

SpeedType Key: begins with

User ID: begins with

Primary Permission List: begins with

Type of SpeedType: = Universal (All Users)

Case Sensitive

Search Clear Basic Search Save Search Criteria

Main Content

You can search for existing **Speedtypes** by entering specific search criteria. There are several search fields (SetID, SpeedType Key, Type of SpeedType, etc.) available that can be used to help narrow your search. You can also change the operator (begins with, contains, =, >=, <=, between, etc.) to further define your search criteria.

Enter Search criteria:

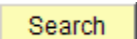
Enter the **SetID** equal to "SHARE"

Enter the **SpeedType Key** that you want to view.

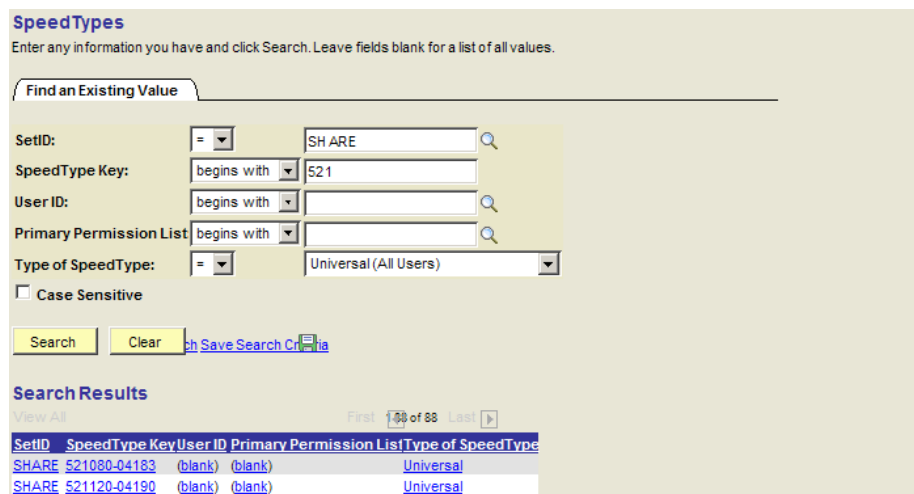
User ID - leave blank

Primary Permission List - leave blank

Enter the **Type of SpeedType** equal to "Universal (All Users)"

Click the  button

SpeedTypes that meet your search criteria will display on the lower portion of the page. The search function can retrieve up to 300 SpeedTypes. Click on the speedtype that you want to view.



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

Find an Existing Value

SetID: = SHARE

SpeedType Key: begins with 521

User ID: begins with

Primary Permission List: begins with

Type of SpeedType: = Universal (All Users)

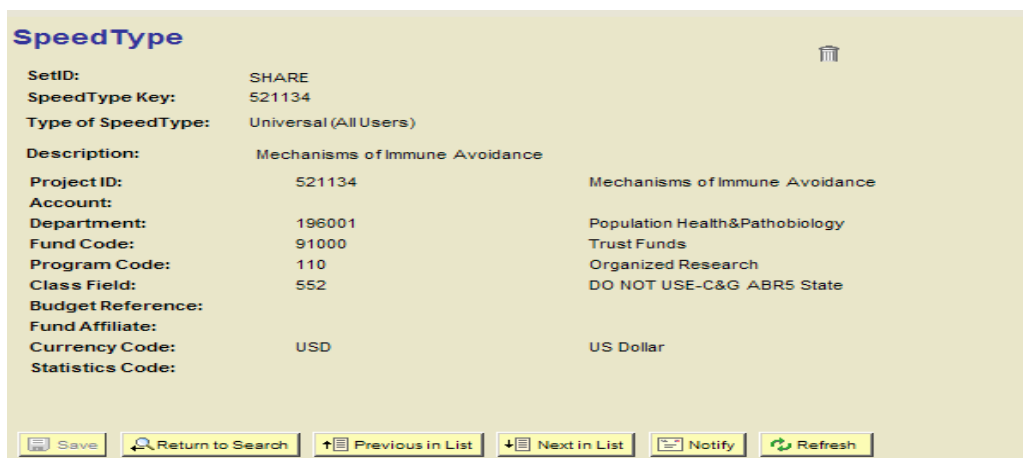
Case Sensitive

Search Clear Save Search Criteria

Search Results
View All First 1 of 88 Last

SetID	SpeedType Key	User ID	Primary Permission List	Type of SpeedType
SHARE	521080-04183	(blank)	(blank)	Universal
SHARE	521120-04190	(blank)	(blank)	Universal

If there is only one SpeedType that meets the specified criteria, that SpeedType will automatically display.



SpeedType

SetID: SHARE

SpeedType Key: 521134

Type of SpeedType: Universal (All Users)

Description: Mechanisms of Immune Avoidance

Project ID: 521134 Mechanisms of Immune Avoidance

Account:

Department: 196001 Population Health&Pathobiology

Fund Code: 91000 Trust Funds

Program Code: 110 Organized Research

Class Field: 552 DO NOT USE-C&G ABR5 State

Budget Reference:

Fund Affiliate:

Currency Code: USD US Dollar

Statistics Code:

Save Return to Search Previous in List Next in List Notify Refresh

Notes:

- ❖ When a Project ID is set to a status of *Pending*, the Speedtype is deleted and a user can no longer enter Journals, Vouchers, Requisitions, or Travel for that Project ID.

The Project ID itself is still in a status of Active for the Financial system for the nightly batch processing. This will allow the system to finish processing any transaction created during the night and not hold up transactions from posting to the General Ledger due to an inactive Project ID on a journal.

- ❖ When closing a Project, Contracts and Grants staff will insert a new row and change the status from Active to Pending. Once all balances are cleared, the system will change that status to Inactive during the nightly process.

An Aging Report (NCGL0055) will be run weekly and will be available in the My Reports pagelet on the Portal for those users that have been granted access. The report will include Projects that have been in Pending status for more than 30 days. The report will be sorted by Department ID. Each college will be responsible for reviewing the report and should resolve any outstanding balances that are preventing the Project status from changing from Pending to Inactive.

- ❖ Chartfield changes must be changed by the respective Central Offices.
- ❖ When chartfield or general attribute changes are made on the Project Segment, these changes will systematically be made on all related Project Phases.