Financial System

Project / Speed Type Inquiry
9.1 Financial System
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.
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

   ![Diagram of MyPACK Portal Main Menu]

   - Click on Financial Systems
   - Click on Journals & Project Maintenance

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,

   ![Diagram of MyPACK Portal FOR FACULTY & STAFF tab]

then click on the Project Maint & Inquiry item
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 Search 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.

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.
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.
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 **Search** 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.

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