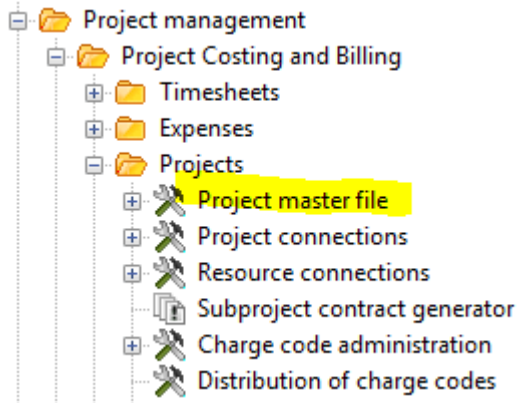


FING-104 Add a Project Code

From desktop client select Project Master File



In the project box, type in a project code preceding the required project and press F7 to retrieve.

e.g. if intending to add B12907 type BB12906

1 - Project	2 - Relation	3 - InvRule	4 - InvInfo	5 - Activity	6 - Work order	7 - Connection	8 - Proj.
Project	B12906	Academic Champion of Enterprise (ACE)					
Pro.type	Academic	Status	Closed				
CustID	1000	Not Required	Main project	B12906			
ExtRef		WBS					
Pre awrd ref		Date from	01/01/2011				
Project mngr	0, 0	Date to	15/11/2018				
Currency	GBP	Currency type	Daily Rates	Created	20/01/2011		
Invoice level	PROJECT	Inv.rule	B12906	R/J Ends			
		TS compl.					
Costc	Bangor Business School	<input checked="" type="checkbox"/> Activity	<input type="checkbox"/> Work order				
Sponsor	None	<input type="checkbox"/> Export	<input checked="" type="checkbox"/> Post				
Funding		Authorisation	No authorisator				
Sub Funding		<input type="checkbox"/> Normal hrs	<input type="checkbox"/> Overtime				
Updated	14/11/2018 16:54:49			User	ABS619		

Then overwrite the project with the code you are intending to set up. A message will be displayed saying code doesn't exist

e.g.



Note: If that message isn't displayed it the project will already have been retrieved and the data will be recovered. A new project number will be required!

You will notice 12 tabs of information. You usually only need to complete items on the first 2 tabs.

So, for the **Project** tab, the following items are to be completed:

1 - Project	2 - Relation	3 - InvRule	4 - InvInfo	5 - Activity	6 - Work order	7 - Connection	8 - Pr
Project	B12F01	Academic Champion of Enterprise (ACE)					
Pro.type	Academic	Status	Active				
CustID		Main project	B12F01				
ExtRef		WBS					
Pre awrd ref		Date from	01/01/2011				
Project mngr	0, 0	Date to	15/11/2018				
Currency	GBP	Currency type	Daily Rates		Created	07/06/2019	
Invoice level		Inv.rule			R/J Ends		
		TS compl.					
Costc	Bangor Business School	<input checked="" type="checkbox"/> Activity	<input type="checkbox"/> Work order				
Sponsor	None	<input type="checkbox"/> Export	<input checked="" type="checkbox"/> Post				
Funding		Authorisation	No authorisator				
Sub Funding		<input type="checkbox"/> Normal hrs	<input type="checkbox"/> Overtime				
Updated	14/11/2018 16:54:49			User	ABS619		

And on the **Relation** tab, the highlighted items to be completed:

1 - Project 2 - Relation 3 - InvRule 4 - InvInfo 5 - Activity 6 - Work order 7 - Connection 8 - Proj.info 9 - Invoiced 10 - Milestones 11 - Cashcard 12 - Timesheet Data											
Project		B12F01 Academic Champion of Enterprise (ACE)									
PROJECT : B12906, Academic Champion of Enterprise											
	Group	Relation	Description	Rel.value	Description	Percent	Units	Value			
	Common										
1		FINOFFICER	Finance Officer	024871	Bill Farnell	100.00		0.00			
2		GENACCOUNT_G	General Account Report Group			100.00					
3		GENACCOUNT_H	General Account HESA Head	ACADDEPT	Academic Departments	100.00		0.00			
4		SUBCOSTC	Sub-section	NONE	.	100.00		0.00			
5		ANALCD03	Prophecy Anal Code 3	B	College Business, Social &	100.00		0.00			
6		ACTGROUP	Activity Group	ACPERS	Personal A/Cs	100.00		0.00			
7		TAXCAT	Tax category	NR	Non Recoverable	100.00		0.00			
8		BUDGETHOLDER	Budget Holder active YES/NO	NO	No - Costc WFDPa to appr	100.00		0.00			
	Grants										
	Research Budgets										
	Data Control										
	System relations										

Also on the Relation tab you need to check the relations so the 'System Relations' folder icon should be pressed:

1 - Project 2 - Relation 3 - InvRule 4 - InvInfo 5 - Activity 6 - Work order 7 - Connection 8 - Proj.info 9 - Invoiced 10 - Milestones 11 - Cashcard 12 - Timesheet Data											
Project		B12F01 Academic Champion of Enterprise (ACE)									
PROJECT : B12906, Academic Champion of Enterprise											
	Group	Relation	Description	Rel.value	Description	Percent	Units	Value			
	Common										
1		FINOFFICER	Finance Officer	024871	Bill Farnell	100.00		0.00			
2		GENACCOUNT_G	General Account Report Group			100.00					
3		GENACCOUNT_H	General Account HESA Head	ACADDEPT	Academic Departments	100.00		0.00			
4		SUBCOSTC	Sub-section	NONE	.	100.00		0.00			
5		ANALCD03	Prophecy Anal Code 3	B	College Business, Social &	100.00		0.00			
6		ACTGROUP	Activity Group	ACPERS	Personal A/Cs	100.00		0.00			
7		TAXCAT	Tax category	NR	Non Recoverable	100.00		0.00			
8		BUDGETHOLDER	Budget Holder active YES/NO	NO	No - Costc WFDPa to appr	100.00		0.00			
	Grants										
	Research Budgets										
	Data Control										
	System relations										

This opens up a further box where the following items need to be checked:

	Group	Relation	Description	Rel.value	Description	Percent	Units	Value			
	System relations										
33		COSTC	Cost centre (CC)	0010	Bangor Business School	100.00		0.00			
34		NEWCOSTC	New Cost Centre - Aug 2018			100.00					
35		CUST.ID	Customer Id			100.00		0.00			
36		RESNO	Resource	0	0, 0	100.00		0.00			
37		PRO.TYPE	Project type	AC	Academic	100.00		0.00			
38		PROJECT	Project code	B12906		100.00		0.00			
39		SPONSOR TYPE	Sponsor Type	NONE	None	100.00		0.00			
40		FUNDING SCHEM	Project Funding Scheme			100.00					
41		SUB FUNDING SCI	Project Sub Funding Scheme			100.00					

The RESNO is the Budget holder

The project still holds the record for the project you initially copied from so this needs to be changed to the new project number.

You can now Save the project. It will automatically be set to Active between the dates you specified.

Note: if there are items required in the online shop for this project (trips, courses etc) these will need to be added directly into the online shop. Currently no facility to automate this so contact finance-systems@bangor.ac.uk with the detail.