Updating RAS Project Details

Login to MyAccess at https://myaccess.ucsf.edu (not shown). Locate and select

PeopleSoft from the applications menu. For help using MyAccess, see the



Access the UCSF **PeopleSoft** Financial System to update Project Details including the Research Support Administrator (RSA) assigned to a Project, the Project Nickname, and the Dept Preferred Posting Level.

Navigate to Project Details

Navigate to the Project Details page within PeopleSoft by starting on the Award Details page, and then clicking the link for Project Information:

Main Menu 🔻

Search Menu:

Grants 👻 >

Awards ->

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Award Profile

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Updating RAS Project Details

- 5 The **Project Details** page will open in a new tab, ensure that pop-ups are allowed for page to display
- Alternatively, to navigate directly to Project Details, access the Main Menu at the top of the page and select: Main Menu > Grants > Awards > Project

Main Menu 👻 > Grants	➤ Awards ▼ > Award Profile
Search Menu:	
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🗀 Purchasing	*
eProcurement	▶ a list of all values.
Grants	Proposal Express
🗀 Billing	Awards Award Profile
🗀 Accounts Payable	🖨 Sponsors 🌱 Project 🛛 🚺
🗀 Financial Gateway	UCSF Reports Project Activity
Commitment Control	Grants Center
🗀 General Ledger	

Updating Project RSA and Nickname

Once on the **Project Details** page, navigate to the **Department Information** section to update important project details, including the **Project RSA** and **Nickname**

	Department Information					
	Department ID:	138335 M_MED-DGIM-CORE				
	Dept Preferred	138433 Q M_MED-DGIM-CORE-GEN				
	Project RSA:	02000000 Tower,Coit 2				
	Project Nickname:	Collaborative Advances in Clin 3				
	-					
2	Update the Proj refreshing or sav	ect RSA by entering a new Employee ID. The name will populate after ving the page				
3	Add or update th	ne Project Nickname by typing free form text into the field				
	Note: the Nickna	ame will appear in some reports within MyReports				
4	Click Refresh to	view your changes on the page				
5	Click Save to sa	ive your changes				
	Note: The upper	right corner of the screen will display 🛛 🙀 saving while in progress then				
	Saved when	complete				

Project Details
Business Units of OUD
Project Information
Project 999999A Project Type: EDGLC Endered Creat LOC
*Description: R25AI000573 SAITERFIELD
Project Primary Hag: V Processing Status:
Award Information
Award ID: A999999 Award Ref #: ABC123456789
Start Date: 04/01/2011 End Date: 03/31/2016
Award Title: Collaborative Advances in Clinical Health Education (CAC
Principal Investigator Information
Award Dia 000000000 Colden Cate S E
Awaid PL 33333555 Golden, Sate S.F.
Project PI: 888888888 Tower,Sutro S.F.
Department Information
Department ID: 138335 M_MED-DGIM-CORE
Dept Preferred 138433 Q M_MED-DGIM-CORE-GEN
Posting Level: Project RSA: 020000000 Tower,Coit
Project Nickname: Collaborative Advances in Clin
Location
Effective Date 04/01/2011
Location Code "GMU1-PARN Description On-Campus - Parnassus
Project F&A Information
*Project ID: 117005A Eff Dt: 01/01/1900
Current FA Rate: 8.00 % Base Code: A
Future Increase: NO
5
Refresh

Updating RAS Project Details

What is the Dept Preferred Posting Level?

The **Dept Preferred Posting Level** is available on the **Project Details** page of an Award in **PeopleSoft** and assigns a preferred Dept ID for posting of transactions within the Award. This field is also commonly referred to as the "Preferred Posting Dept ID".

The Preferred Posting Dept ID information is located within the Department Information section of the Project Details page and is set as follows:

- **Department ID** is populated from the Award
- When a new Project is created within the Award:
 - a) If the Dept ID assigned is at the posting level, then the **Dept Preferred Posting Level** is set to the same value
 - b) If the Project's Dept ID is *NOT* set at the posting level, the field is left blank

Department ID:	138335 M_MED-DGIM-CORE	
Dept Preferred Posting Level:	138433 Q M_MED-DGIM-CORE-GEN	
Project RSA:	020000000 Tower,Coit	
Project Nickname:	Collaborative Advances in Clin	

The **Dept Preferred Posting Level** is displayed on the **AP Subrecipient Subcontract Voucher Report**. Because this is a posting level Dept ID, Accounts Payable (AP) can process vouchers to pay invoices against the subcontract. If AP finds this field is blank on the report, the Department will be notified to update the Preferred Posting Dept ID.

Setting the Preferred Posting Dept. ID

The RSA, or other department user with access to the Project, can assign the Dept Preferred Posting Level in PeopleSoft.

1	Navigate to the Award and then to the Project Details page within PeopleSoft	Department Inform	nation 138335 M_12-DGIM-CORE
2	Populate the Dept Preferred Posting Level field manually or use the <i>Q</i> icon to search – only posting level Dept IDs are valid, "Parent" level Dept IDs cannot be entered	Dept Preferred Posting Level: Project RSA:	138433 M_MED-DGIM-CORE-GEN 020000000 Tower,Coit
3	Click Refresh to view your changes on the page and update the name of the Dept Preferred Posting Level	Project Nickname:	Collaborative Advances in Clin
4	Click Save to save your changes		
	Note: The upper right corner of the screen will display	while in progress	Up 4 F&A Base/Rate 3

For more Contracts & Grants Training & Job Aids, visit the Controller's Office website.