

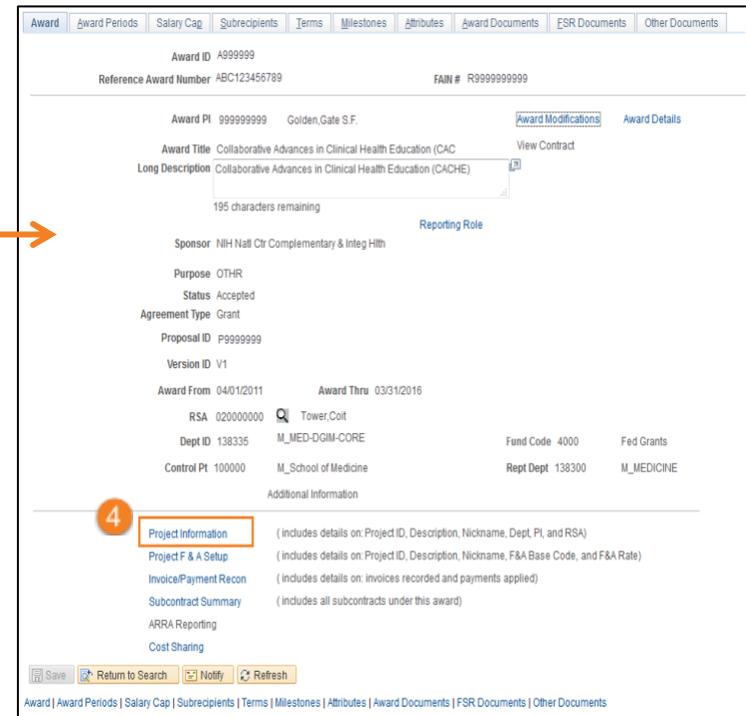
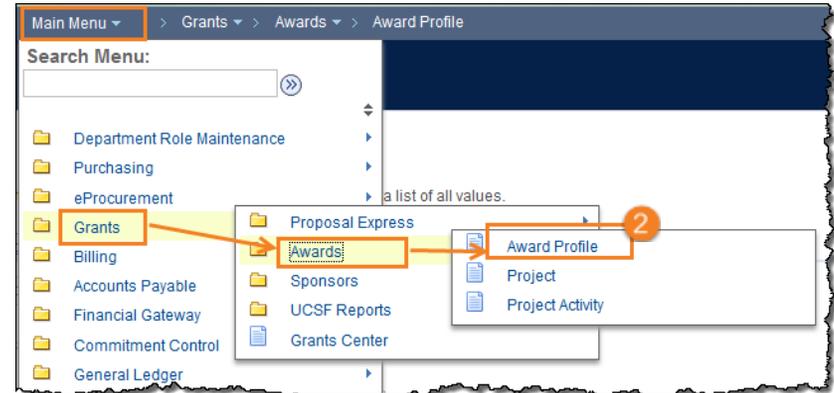
# Updating RAS Project Details

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**:

- 1 Login to **MyAccess** at <https://myaccess.ucsf.edu> (not shown). Locate and select **PeopleSoft** from the applications menu. For help using **MyAccess**, see the [MyAccess Single Sign-On](#) page.
- 2 Navigate to the **Award Profile** page: **Main Menu > Grants > Awards > Award Profile**
- 3 Enter the Award search criteria and click **Search**. The  symbol may display on the top right corner of the screen to indicate the search is in progress
  - a If an exact match is found you will navigate directly to the **Award Profile**
  - b If multiple values match your search criteria, click on the link for your desired award (not shown)
- 4 Once in Award Profile, click on the **Project Information** link to display all the projects associated with the award
- 5 A pop-up window will display all projects on the award. Select the desired **Project ID**



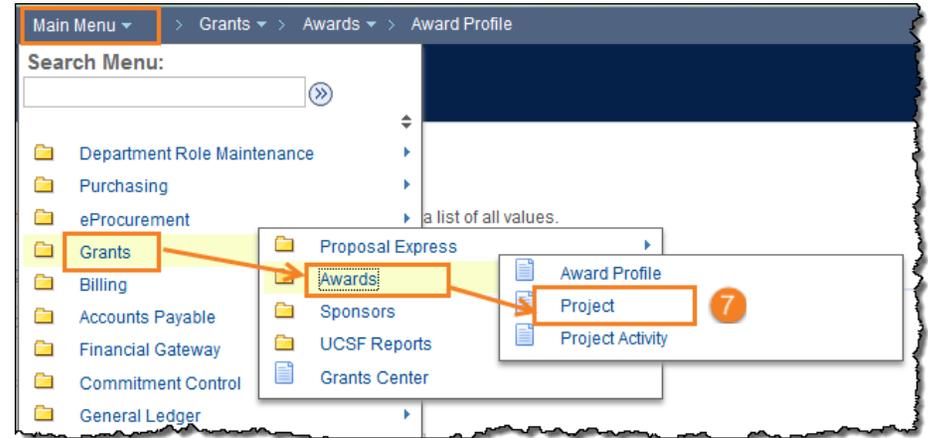
Award Projects

Primary Project	Project Status	Project DeptID	Project ID	Project Description	Project Nickname	Project Dept Name	PI Empl ID	PI Name	Project RSA
1	<input checked="" type="checkbox"/>	Active	138335	999999A R25AT006573 SATTERFIELD	Collaborative Advances in Clin	M_MED-DGIM-CORE	024112278	Satterfield,Jason M.	Yu,Chung Yee
2	<input type="checkbox"/>	Active	138335	999999B R25AT006573 SATTERFIELD	Collaborative Advances in Clin	M_MED-DGIM-CORE	024112278	Satterfield,Jason M.	Yu,Chung Yee

Buttons: OK, Cancel, Refresh

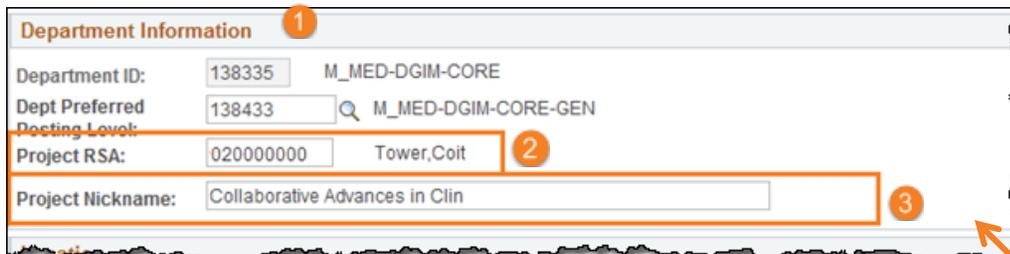
# Updating RAS Project Details

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



## Updating Project RSA and Nickname

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



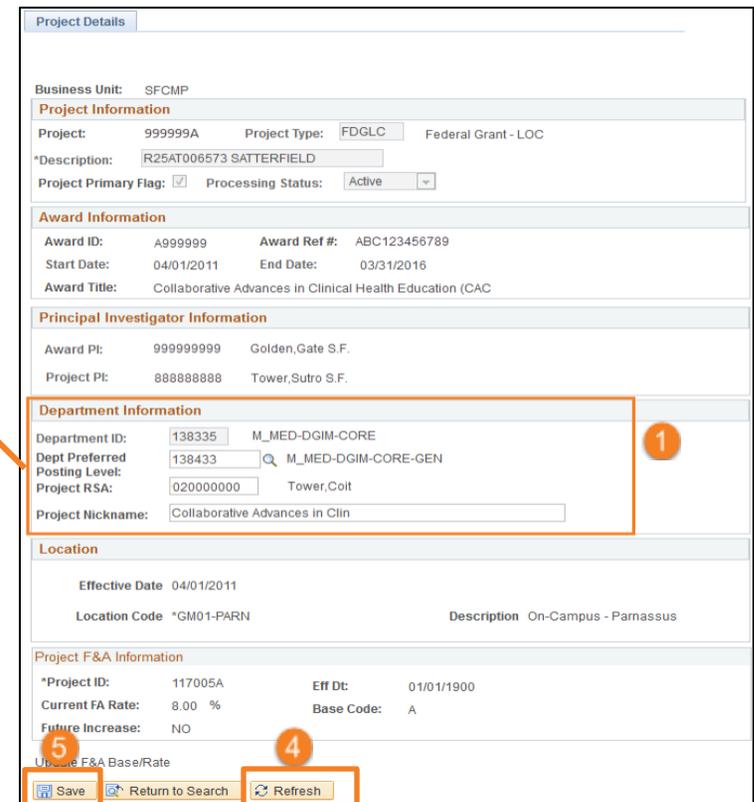
- 2 Update the **Project RSA** by entering a new Employee ID. The name will populate after refreshing or saving the page
- 3 Add or update the **Project Nickname** by typing free form text into the field

Note: the Nickname will appear in some reports within **MyReports**

- 4 Click **Refresh** to view your changes on the page
- 5 Click **Save** to save your changes

Note: The upper right corner of the screen will display  while in progress then

 when complete



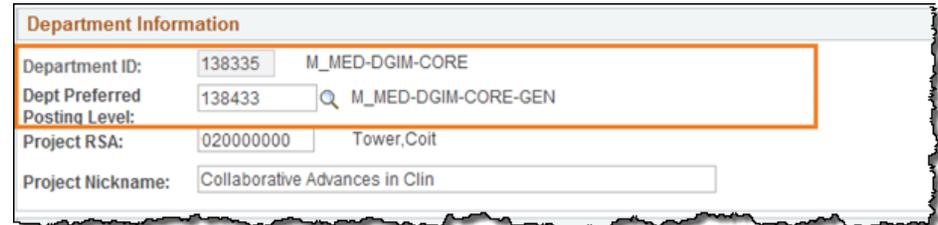
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## What is the Dept Preferred Posting Level?

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

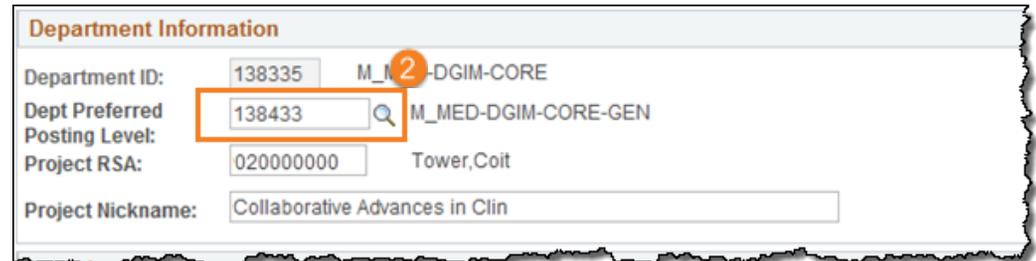


The **Dept Preferred Posting Level** is displayed on the **AP Subrecipient Subcontract Voucher Report**. Because this is a posting level Dept ID, Accounts Payable (AP) can process vouchers to pay invoices against the subcontract. If AP finds this field is blank on the report, the Department will be notified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

## Setting the Preferred Posting Dept. ID

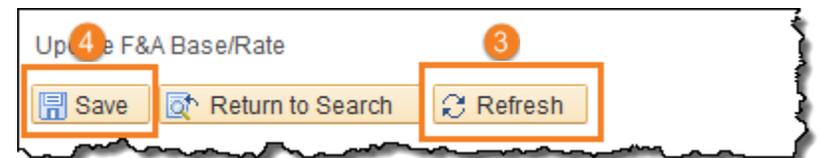
The RSA, or other department user with access to the Project, can assign the **Dept Preferred Posting Level** in **PeopleSoft**.

- 1 Navigate to the Award and then to the **Project Details** page within **PeopleSoft**
- 2 Populate the **Dept Preferred Posting Level** field manually or use the  icon to search – only posting level Dept IDs are valid, “Parent” level Dept IDs cannot be entered
- 3 Click **Refresh** to view your changes on the page and update the name of the Dept Preferred Posting Level
- 4 Click **Save** to save your changes



Note: The upper right corner of the screen will display  while in progress

then when complete 



For more [Contracts & Grants](#) Training & Job Aids, visit the Controller’s Office website.