FORMS6: New Sub-Project Request -INVESTMENTS

The purpose of this manual is to explain how to request a New Sub-Project using Agresso Forms. This New Sub-Project Request Form will then follow an Approval workflow dependent on the Cost Class selected on the Form until it then a new Sub-Project is created, or the request is rejected and closed off.

This form will cover the following cost classes:

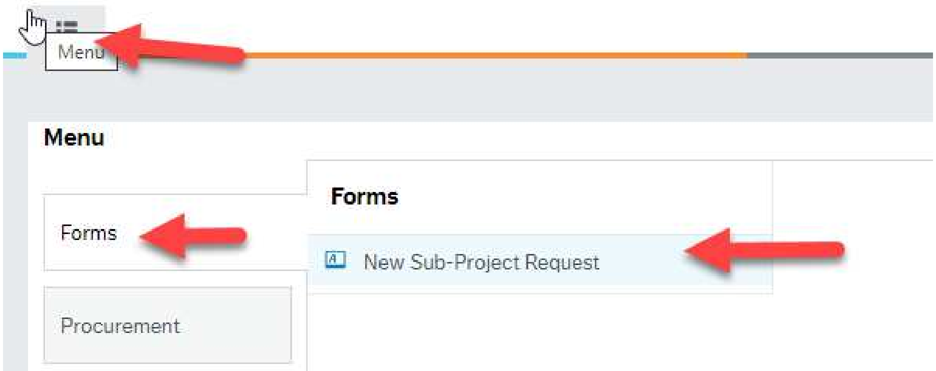
800	Endowment
801	Endowment - Investments

Once the New Sub-Project Request Form has created a new Sub-Project an email will automatically be sent to the Form Requestor and Sub-Project Budget Holder making them aware the Sub-Project is available to use.

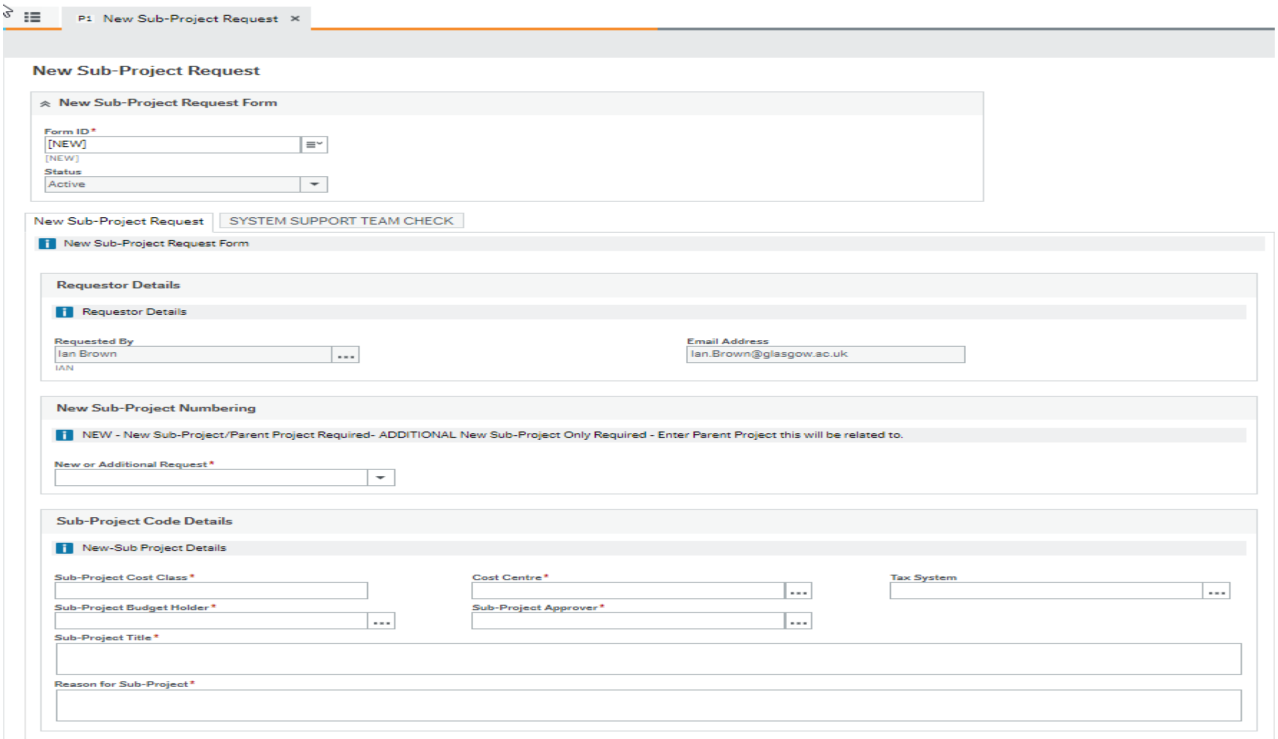
There is also an enquiry that can be used to check the status of the Request as it goes through the workflow process.

FORMS6.1: New Sub-Project Request

1. To access the New Sub-Project Request Form:

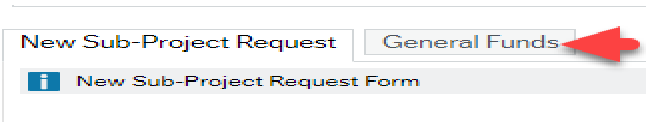


The following screen will appear:



<u>The red star * indicates the required fields that must be entered when completing the Form</u>

2. Depending on the Cost Class entered on the form other Tabs of the Form will need to be completed.



3. Dependent on the data entered in certain fields the Form will dynamically update other fields/Tabs with details.

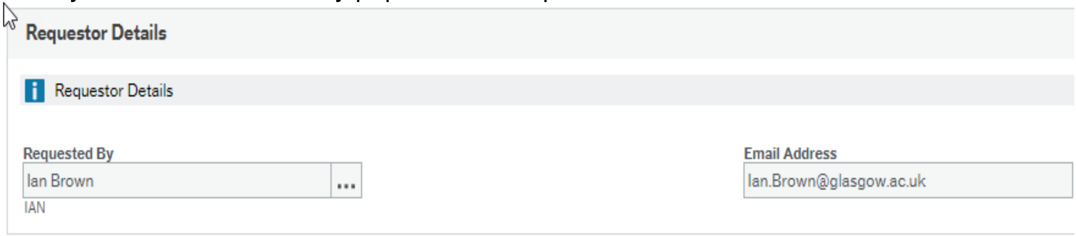
FORMS6.1.2: New Sub-Project Request Details

1. Form ID: This appears once all the Form details have been entered and the Form has been saved.

2. Status: This will show the Status of the Requisition

   - Active – The Form can be entered
   - Closed – The Form data cannot be updated.

3. The system will automatically populate the requestor details and email address:


Requestor Details

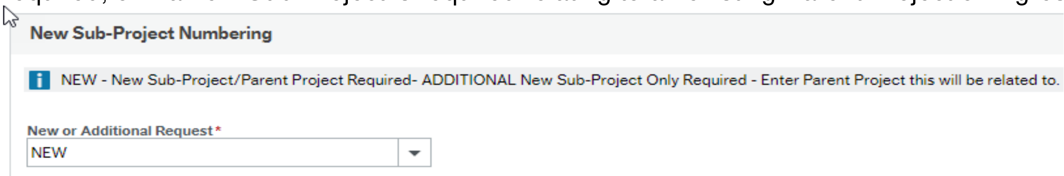
Requestor Details

Requested By
Ian Brown
IAN

Email Address
Ian.Brown@glasgow.ac.uk

4. New Sub-Project Numbering: Any new Sub-Project number will be determined by the system.

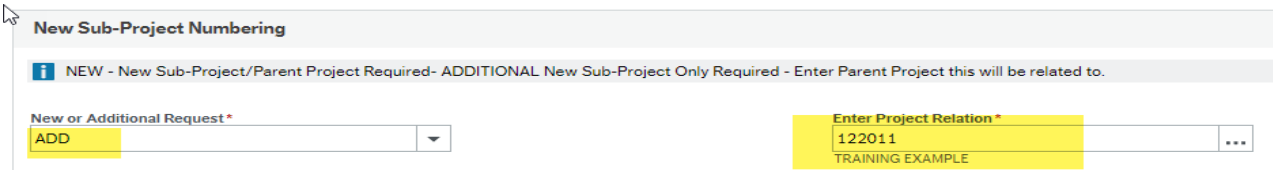
The Requestor will be able to select if this is a brand new Sub-Project and if Parent Project is also required, or if a new Sub-Project is required relating to an existing Parent Project on Agresso.


New Sub-Project Numbering

NEW - New Sub-Project/Parent Project Required- ADDITIONAL New Sub-Project Only Required - Enter Parent Project this will be related to.

New or Additional Request*
NEW

- NEW – A new Sub-Project and the related Parent Project will be created by Agresso.
- ADD – A new field will appear to enter the relevant Parent Project that a new Sub-Project will be related to:


New Sub-Project Numbering

NEW - New Sub-Project/Parent Project Required- ADDITIONAL New Sub-Project Only Required - Enter Parent Project this will be related to.

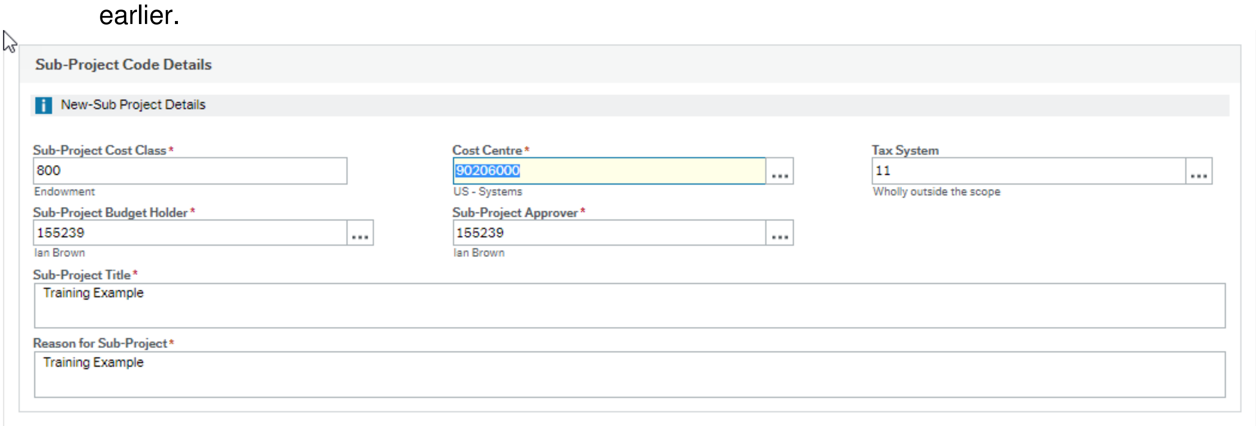
New or Additional Request*
ADD

Enter Project Relation*
122011
TRAINING EXAMPLE

5. Sub-Project Cost Class: Enter Cost Class for the New Sub-Project. This Cost Class will drive any further Tabs required to be entered and will also populate other fields within the Form. i.e. Tax System, YTD/LTD.

6. Cost Centre: Enter Cost Centre for the New Sub-Project.

7. Tax System: This field will automatically populate from the Cost Class selected earlier.


Sub-Project Code Details

New-Sub Project Details

Sub-Project Cost Class*
800
Endowment

Cost Centre*
90206000
US - Systems

Tax System
11
Wholly outside the scope

Sub-Project Budget Holder*
155239
Ian Brown

Sub-Project Approver*
155239
Ian Brown

Sub-Project Title*
Training Example

Reason for Sub-Project*
Training Example

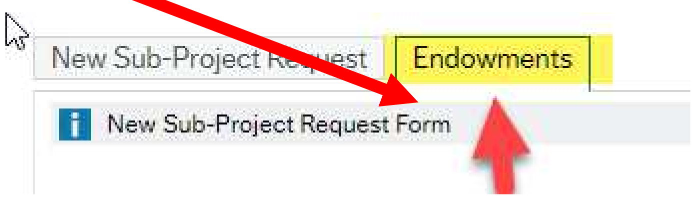
8. Sub-Project Budget Holder: Enter the staff number of the Budget Holder for the New Sub-Project.

9. Sub-Project Approver: Enter the staff number of the Approver for financial processes for the New Sub-Project.

10. Sub-Project Title: Enter the title of the New Sub-Project. (100 Characters max)

11. Reason for Sub-Project: Enter the Reason required to open a New Sub-Project.

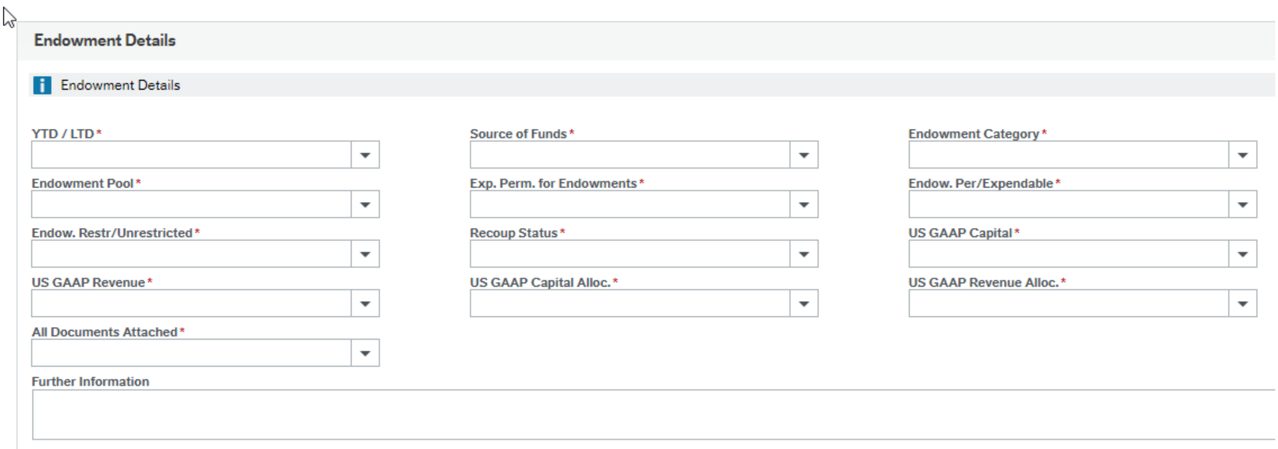
12. Depending on the Cost Class entered you will be required to enter more Mandatory information.



FORMS6.2: Endowments Tab

This Tab will be populated when the following cost classes have been selected:

800	Endowment
801	Endowment - Investments



1. YTD/LTD (Year to Date or Life to Date): Select whether this Sub-Project will be YTD or LTD.

2. Endowment Category: Use the Dropdown within this field to select the relevant Endowment Category.

Category	Use of funds
Prizes	Prize or award
Bursaries	Payment of a bursary
Scholarship	Scholarship maintenance or fees
Teaching	All other uses including lectureships and appointments to chairs
Miscellaneous	Ferguson Bequest only
Other	Other

NA	Not Applicable

3. Endowment Pool: Use the Dropdown menu within this field to select the relevant Endowment Pool.

Endowment	Pool Type of fund
Endowment KS	Kelvin Smith Scholarship sub-projects (child)
Endowment SUP	Support sub-project funded from an existing endowment sub-project to form a parent and child
PGENDOW	Funding from the postgraduate scholarship fund
Endowment	For all other endowment funds
Non-Pool	Non-Pool
NA	Not Applicable

4. Expenditure Permitted for Endowment: Use the Dropdown menu within this field to select the relevant option.

Experm	Capital Allowed	Indicates capital can be spent
	Revenue Only	Only the revenue can be spent, capital inalienable
	Allocation Only	Set amount given to a child sub-project
	Unspent revenue added to capital	Any unspent revenue is added to the capital at the yearend and not available for spending

5. Endowment Permanent or Expendable: Depending on previous selections when completing this form this field may already have a value automatically assigned:

Endowpermexp	Permanent or Expendable	Permanent = capital cannot be spent Expendable = capital can be spent

6. Endowment Restricted/Unrestricted: Use the Dropdown menu within this field to select the relevant option

Endowresunres	Restricted or Unrestricted	Restricted = Donor has restricted the use of funds for a particular purpose Unrestricted = Donor has put no restrictions on the fund and leaves it up to the University to decide the use

7. Recoup Status: Will the fund be used for a salary recoup? Please select the relevant option.

8. US GAAP Capital: Use the Dropdown menu within this field to select the relevant option

US Capital	PR or TR	Permanently Restricted or Temporarily Restricted (follows what is chosen at Endowpermexp)

9. US GAAP Revenue: Use the Dropdown menu within this field to select the relevant option.

US Revenue	TR or U	TR = Temporarily restricted until used under the terms U = unrestricted use of the funds

10. US GAAP Capital Allocation: Use the Dropdown menu within this field to select the relevant option.

US Cap Alloc	Donor or Board	Who makes the decision on the use of the capital. Board means the University. Donor means the benefactor.

11. US GAAP Revenue Allocation: Use the Dropdown menu within this field to select the relevant option

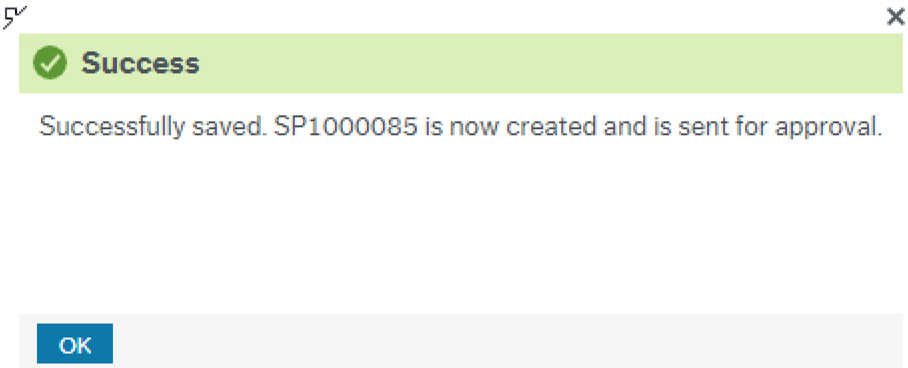
US Rev Alloc	Donor or Board	Who makes the decision on the use of the revenue. Board means the University. Donor means the benefactor.

12. All Documents Attached: Please confirm you have all the relevant documents available to attach to this New Sub-Project Request for **STEP 15.**

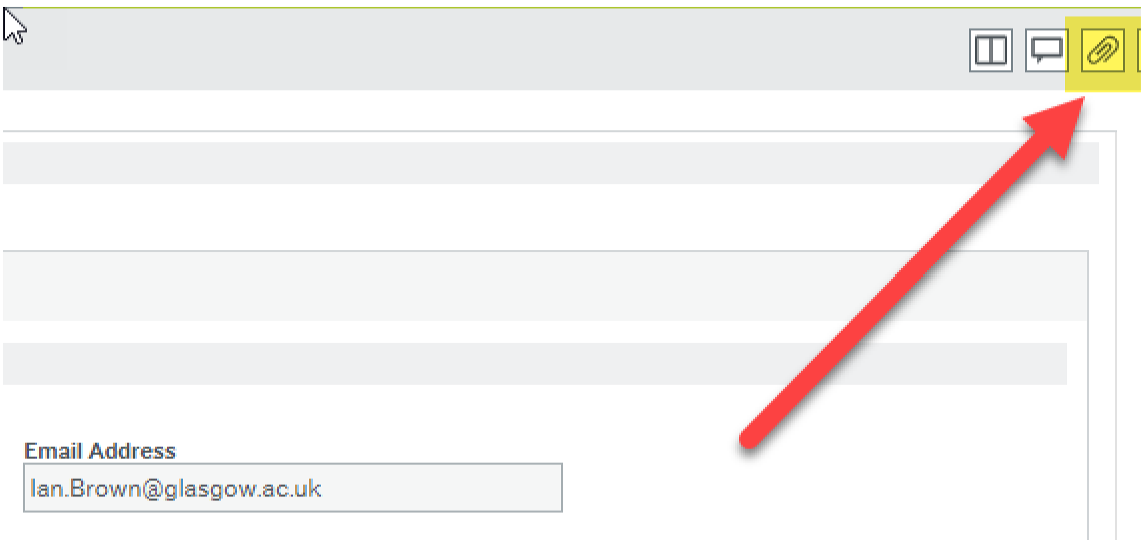
13. Further Information: If Further details are required regarding this New Sub-Project Request this should be entered within this field.

14. Once all the details and the Mandatory fields have been completed the form can be Submitted for Approval by clicking on the following button:

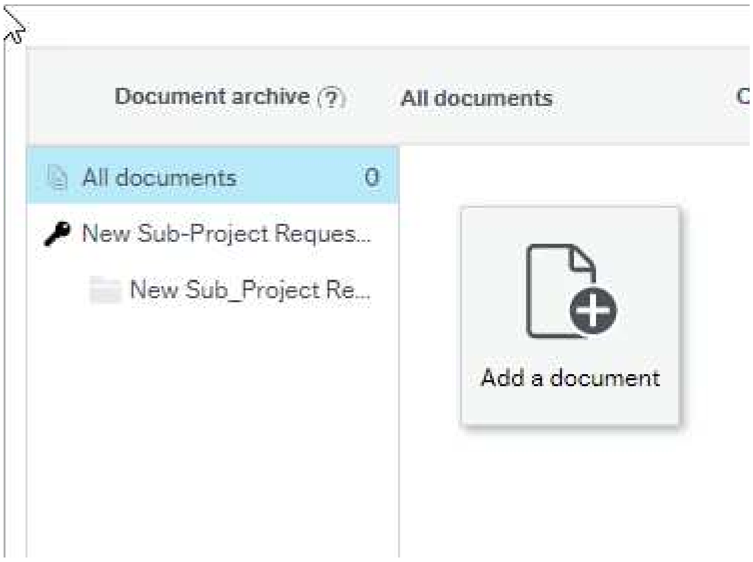
This will then show the Form ID number and confirm the Form has been created and sent for approval



15. If any documents are needed to be added to the form this should be done after the Form has been created and then by clicking the following icon  :



This will give them the option to add a document:



And the user can upload and Save the document to be added: