

## FORMS4: New Sub-Project Request -SALREC

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:

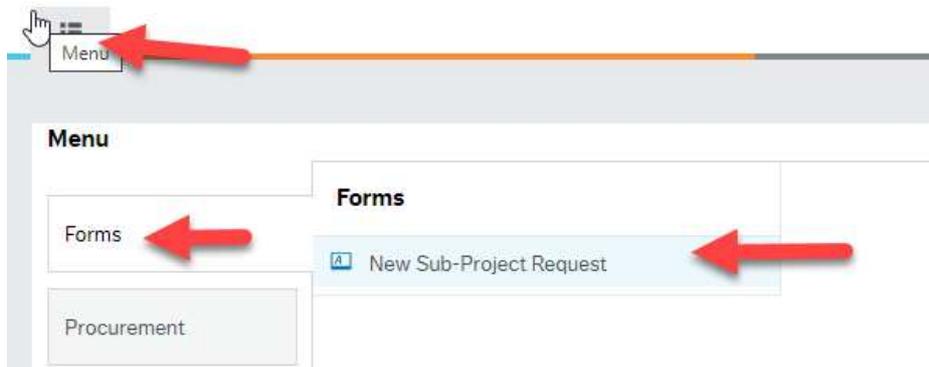
540	Commercial – Salaries Recovered
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Once the New Sub-Project Request Form has created a new Sub-Project an email will automatically be sent to the Form Requestor and Sub-Project Budget Holder making them aware the Sub-Project is available to use.

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

### FORMS4.1: New Sub-Project Request

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



The following screen will appear:

P: New Sub-Project Request x

### New Sub-Project Request

New Sub-Project Request Form

Form ID\* [NEW] [v]

Status [NEW]

Active [v]

New Sub-Project Request SYSTEM SUPPORT TEAM CHECK

New Sub-Project Request Form

**Requestor Details**

Requestor Details

Requested By: Ian Brown [v]

Email Address: Ian.Brown@glasgow.ac.uk

**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\* [v]

**Sub-Project Code Details**

New-Sub Project Details

Sub-Project Cost Class\* [v]

Cost Centre\* [v]

Tax System [v]

Sub-Project Budget Holder\* [v]

Sub-Project Approver\* [v]

Sub-Project Title\* [v]

Reason for Sub-Project\* [v]

**The red star \* indicates the required fields that must be entered when completing the Form**

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

New Sub-Project Request General Funds [v]

New Sub-Project Request Form

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

## FORMS4.1.2: New Sub-Project Request Details

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

New Sub-Project Request Form

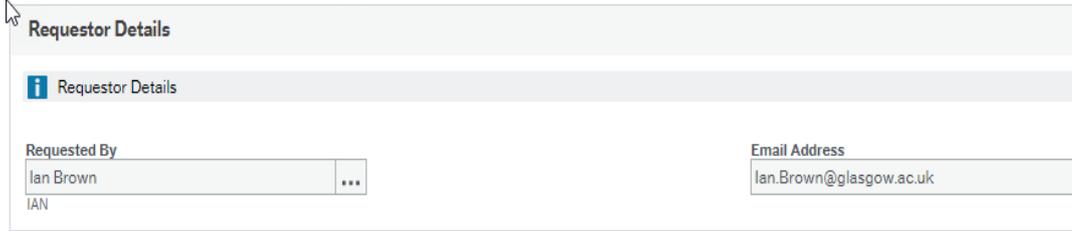
Form ID\* [NEW] [v]

Status [NEW]

Active [v]

- 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:



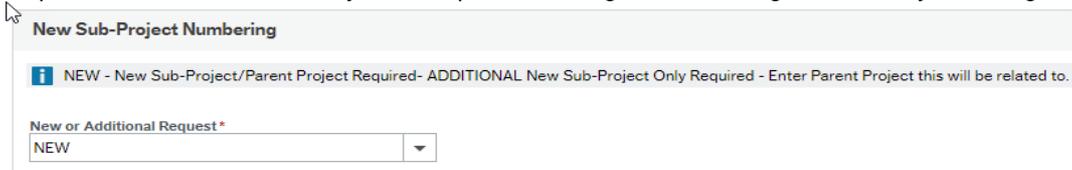
**Requestor Details**

**Requestor Details**

Requested By: Ian Brown  
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.

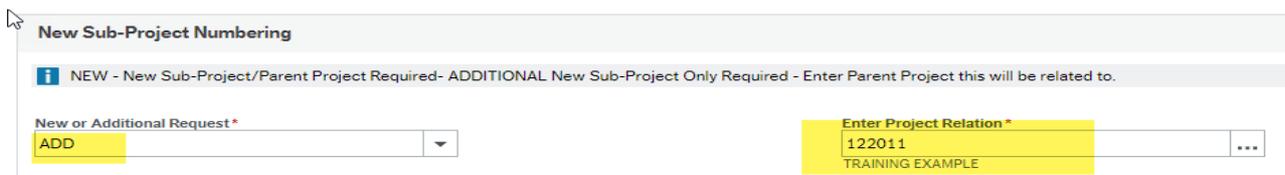


**New Sub-Project Numbering**

**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.**

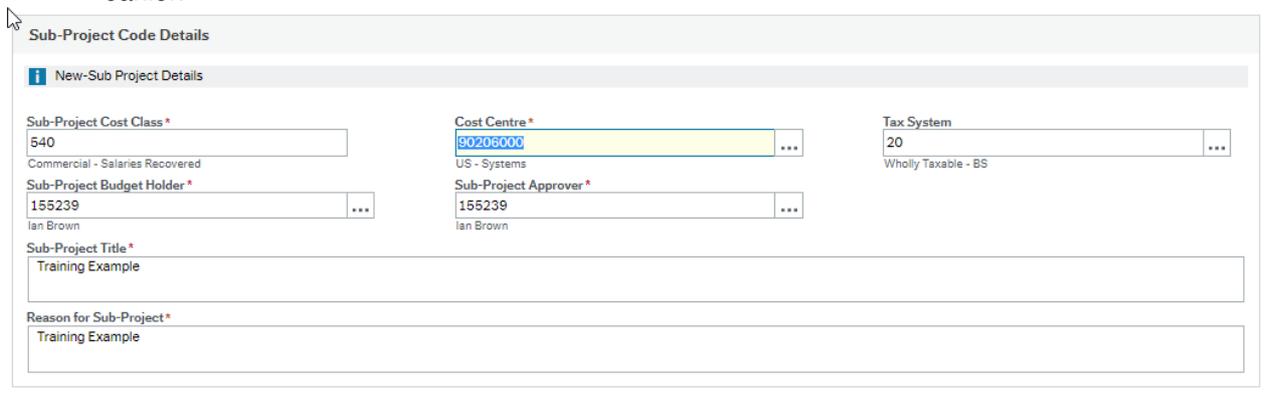
New or Additional Request\*: ADD

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\*: 540  
Commercial - Salaries Recovered

Sub-Project Budget Holder\*: 155239  
Ian Brown

Sub-Project Title\*: Training Example

Reason for Sub-Project\*: Training Example

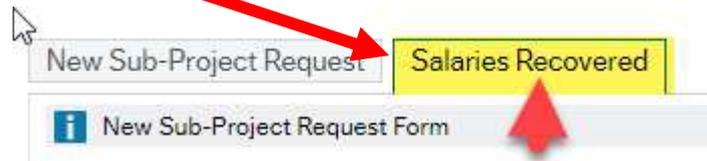
Cost Centre\*: 90206000  
US - Systems

Sub-Project Approver\*: 155239  
Ian Brown

Tax System: 20  
Wholly Taxable - BS

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

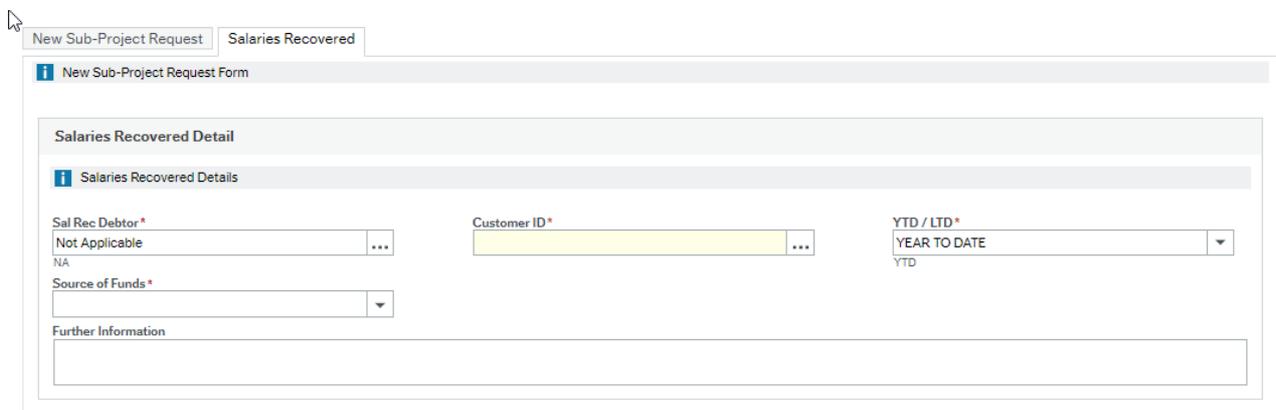
9. Sub-Project Approver: Enter the staff number of the Approver for financial processes for the New Sub-Project.
10. Sub-Project Title: Enter the title of the New Sub-Project. (100 Characters max)
11. Reason for Sub-Project: Enter the Reason required to open a New Sub-Project.
12. Depending on the Cost Class entered you will be required to enter more Mandatory information.



## FORMS4.2: Salaries Recovered Tab

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

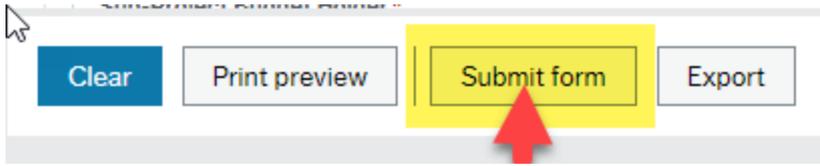
540	Commercial – Salaries Recovered
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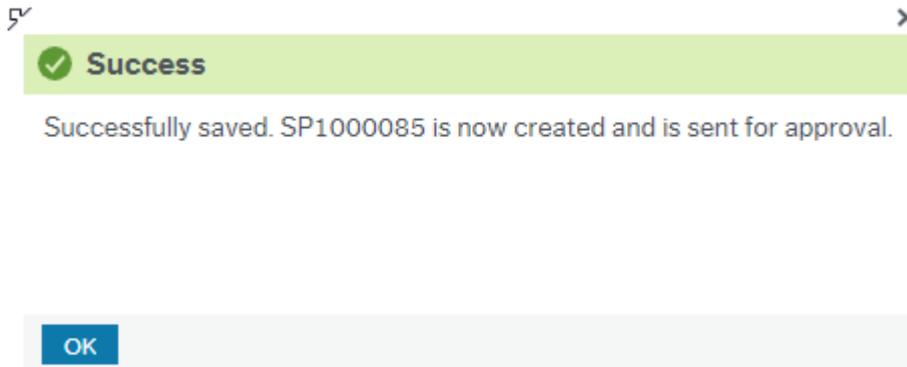
1. Salaries Recovered Debtor: This will default to Not Applicable and be completed by the Accounts Receivable during the approval process.
2. Customer ID: Select the Customer that will be used for Invoicing for the Salaries Recovered Process
3. YTD/LTD (Year to Date or Life to Date): This field will automatically populate from the Cost Class selected earlier.
4. Source of Funds: Use the Dropdown option within this field to select the Source of Funds.
5. Further Information: If Further details are required regarding this New Sub-Project Request this should be entered within this field.



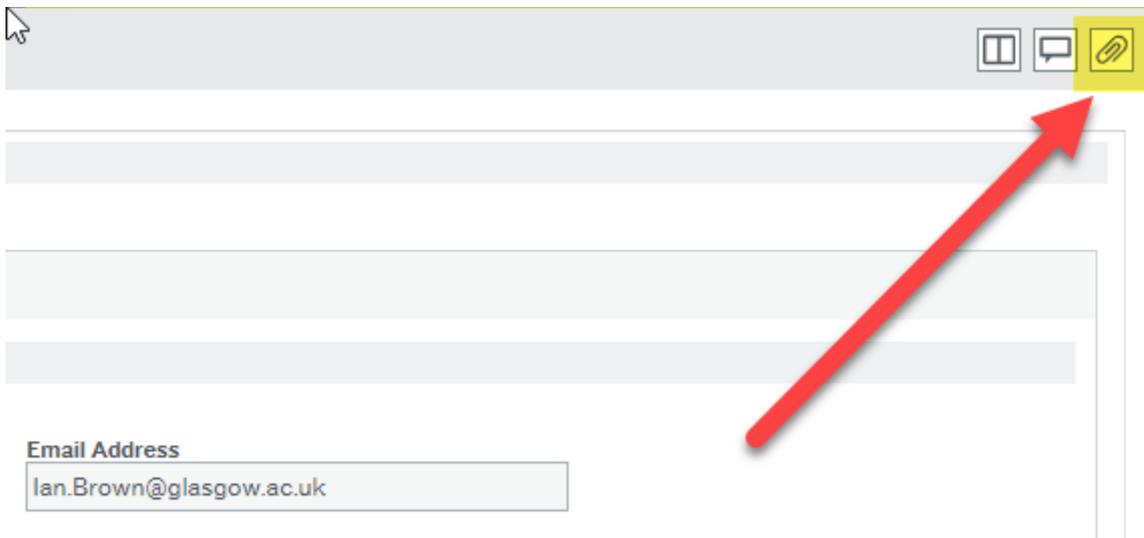
- Once all the details and the Mandatory fields have been completed the form can be Submitted for Approval by clicking on the following button:



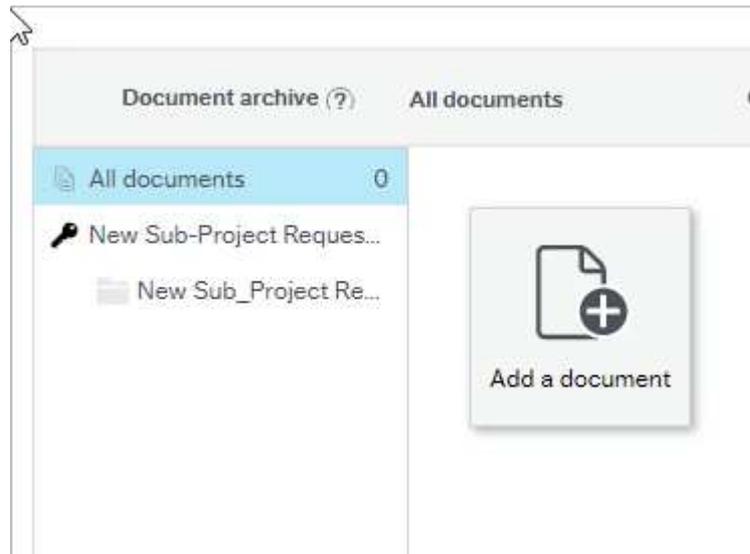
This will then show the Form ID number and confirm the Form has been created and sent for approval



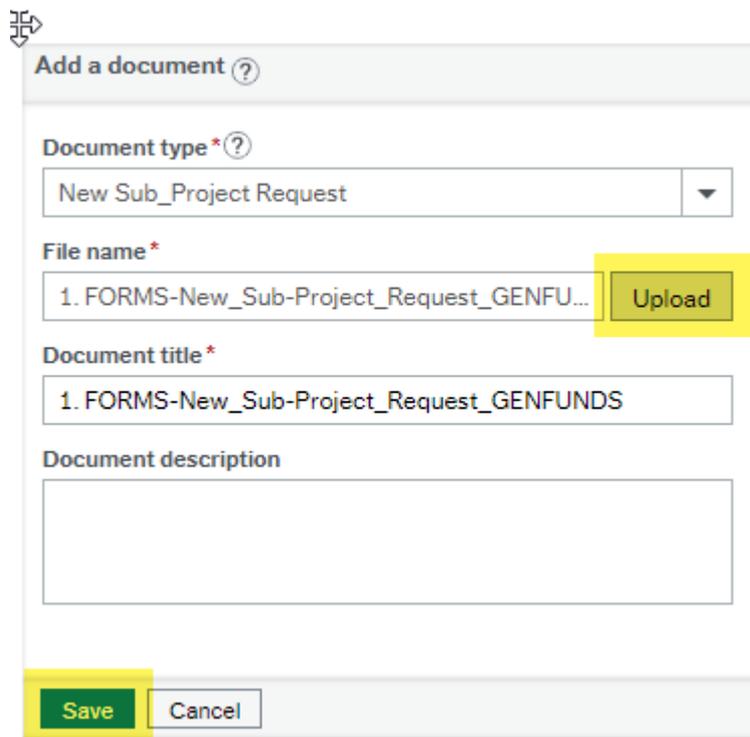
- If any documents are needed to be added to the form this should be done after the Form has been created and then by clicking the following icon  :



This will give them the option to add a document:



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



The screenshot shows the 'Add a document' form. The title is 'Add a document (?)'. The form contains the following fields:
 

- Document type\* (?)**: A dropdown menu with 'New Sub\_Project Request' selected.
- File name\***: A text input field containing '1. FORMS-New\_Sub-Project\_Request\_GENFU...' and a yellow 'Upload' button to its right.
- Document title\***: A text input field containing '1. FORMS-New\_Sub-Project\_Request\_GENFUNDS'.
- Document description**: A large empty text area.

 At the bottom of the form, there are two buttons: a green 'Save' button and a white 'Cancel' button. The 'Save' button is highlighted with a yellow border.