



Planning-Only Projects - Quick Reference

Planning-Only Projects

While planning occurs at the project level in UPlan, sometimes users will need to plan ahead for activity that does not yet have a Project ID or perhaps for a group of activities without Project-specific information yet available. Or, planners may decide to plan at the Project Use level to reduce their planning workload. To accommodate planning in these cases, UPlan includes a series of Planning-Only projects, 14 in total, each one identified as pertaining to a specific Project Use. Planners may select any of these projects and enter plans on the Revenue & Expense form. All planning-only projects have the prefix of ADJ in their description.

Project ID	Project Description	Project Use	Purpose
2011368	ADJ Sponsored NoNIHcap	SPONSORED_PROJ	Adjustment projects, used in general planning and employee planning to plan additional sponsored activity not covered by Faculty Portfolio (FP). Not used in Commitment Tracking.
2011369	ADJ Sponsored NIHcap1	SPONSORED_PROJ	
2011370	ADJ Sponsored NIHcap2	SPONSORED_PROJ	
2011371	ADJ Recruitment	RECRUIT_FAC_STARTUP	Adjustment projects, used in all spaces to plan additional activity not covered by an existing project. May also be used to avoid planning at the project level. Not used in Commitment Tracking.
2011372	ADJ Retention	RETENTION	
2011373	ADJ Other Faculty/PI	FAC_PI_OWNER_ACTV	
2011374	ADJ General	GENERAL	
2011375	ADJ Affiliations	AFF_AGREE_CON	
2011376	ADJ Pgm Investments	PROG_INVESTMT	
2011378	ADJ MC Activities	MED_CTR_ACTV	
6000468	ADJ Loan	LOAN_STU_FAC_STAFF	
8001131	ADJ Recharges	RECHARGE	
8500020	ADJ Recharges External	RECHARGE_EXT	
8800131	ADJ Costed Central	COSTED_CEN_ACTV	



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Projects Planned in Faculty Portfolio

Not all projects will be planned at the project level in UPlan. Although all project IDs can be planned in Faculty Portfolio, UPlan only brings in project IDs with project uses of Sponsored, Recruitment, Retention, and Other faculty/PI/owner activity. UPlan brings in FP data on a nightly basis. This data is aggregated at the Project Use level. Whether the planner copies this data to the Revenue & Expense or Employee forms is entirely optional.

Note that only the current year and future Year 1 data will feed from Faculty Portfolio. Year 2 plans for sponsored activity, faculty recruitment, faculty retention and other faculty/PI projects will be based on global assumptions.

Project_ID	Project Description	Project Use	Purpose
2011364	FP Sponsored NoNIHcap	SPONSORED_PROJ	Aggregated projects, FP data in General Planning and Employee Planning.
2011365	FP Sponsored NIHcap1	SPONSORED_PROJ	
2011366	FP Sponsored NIHcap2	SPONSORED_PROJ	
2011367	FP Recruitment	RECRUIT_FAC_STARTUP	Aggregated projects, FP data in General Planning and Employee Planning. Revenue/ transfers fed from commitments.
2011379	FP Retention	RETENTION	
2011377	FP Other Faculty/PI	FAC_PI_OWNER_ACTV	

Once in UPlan, data from Faculty Portfolio will be available to plan at the aggregated project use ID. Users can also use planning-only adjustment projects to alter their departmental plan for sponsored activity, faculty recruitment, faculty retention and other faculty/PI projects. Below is a table showing the FP Project IDs and ADJ Project IDs., Planners can use either, however the FP IDs are probably more useful than the ADJs because they will show actuals as they come in.

FP Project_ID	FP Project Description	ADJ Project_ID	ADJ Project Description
2011364	FP Sponsored NoNIHcap	2011368	ADJ Sponsored NoNIHcap
2011365	FP Sponsored NIHcap1	2011369	ADJ Sponsored NIHcap1
2011366	FP Sponsored NIHcap2	2011370	ADJ Sponsored NIHcap2
2011367	FP Recruitment	2011371	ADJ Recruitment
2011379	FP Retention	2011372	ADJ Retention
2011377	FP Other Faculty/PI	2011373	ADJ Other Faculty/PI