

## Project Roles and Descriptions

<b>Project ARC Role</b>	<b>Description</b>
PI	Principal Investigator
CO-I	Co Investigator
SCOPE-I	Scope Investigator
OTHER KEY	Other Key Personnel
FELLOW	Fellow
SPA FA	SPA Financial Analyst
PROJ MANAGER	Project Manager
ALT MANAGER	Scope Manager
PROJ DIRECTOR	Project Director
AVP	Assistance Vice President
FIN MANAGER	Finance Manager
CLIENT	Capital - Client
RESP PERSON CNV	Converted Responsible Person
RESP PERSON	Responsible Person
REPORT ACCESS	Report Access

## Project Statuses

During the lifecycle of a Project, there are several status a Project may take on. Below is a table that highlights the five different Project Status, the purpose for using such status, and the impact it has on the Processing Status.

<b>Project Status</b>	<b>Status Purpose</b>	<b>Processing Status</b>
Open	Default status when Project is created	Active
Hold	Status manually entered when Project or Activity is within the performance period, but the transactions must be stopped due to regulatory, contractual, or other unusual circumstances. Therefore, everything is blocked and no transactions can pass	Inactive
Ended	Intended to stop new commitments and inform users that the Project has ended  Existing encumbrance can be paid  The status is changed one day after the end date	Active
Closeout	Used during Project closeout to make correcting journal entries, but not allow new expenses  The status is changed ninety days after the end date	Active
Closed	Status will be used once all closeout entries have been done and the Project or Activity is ready to be closed	Inactive



## Project Status and ARC Transactions

There are times when transactions will need to be processed for a project even after the project's end date (e.g. Invoices). As in the past, there is a 90-day grace period within which transactions can continue to be processed for projects. A Project's status is a useful indicator to determine whether transactions will be permitted. ARC uses Statuses that mimic the Freeze and Delete Flags in FAS. Project Status controls online entry in ARC, while Processing Status controls integrating systems.

The table below provides guidance, by transaction type, on how a project's status determines what will happen when submitting transactions in ARC.

Transaction Type	Project Status					
	Open	Ended	Closeout	Closed	Hold	Budget
Requisition	OK	Reject	Reject	Reject	Reject	Reject
PO	OK	Reject	Reject	Reject	Reject	Reject
Voucher	OK	Warning	Reject	Reject	Reject	Reject
PO Close	OK	Warning	Warning	Reject	Reject	Reject
Journal Entry	OK	Warning	Warning	Reject	Reject	Reject
	Active	Active	Active	Inactive	Inactive	Active
	Processing Status					

- “OK” means that the transaction is allowed to be processed
- “Reject” means that the transaction cannot be processed
- “Warning” means that the transaction can be processed, but the user will receive a warning message when submitting

*Note on Project Statuses:*

- The ‘Ended’ status is applied to a project automatically based on the Project/Activity End date
- ‘Closeout’ and ‘Closed’ statuses are applied manually by SPF
- ‘Hold’ status requires agreement between School/Department, SPF, and SPA