System Lookups

Maintain Classifications

Classifications can be applied to Projects and Contacts. Classifications consist of a name and a value or a number of values. For example, a classification with a name such as ‘Alternative Energy’ could have values ‘Solar’, ‘Wind’, and ‘Wave’. The classification could be mandatory with a default value of ‘Wind’. When a user transfers a project, or adds or edits classifications in the project viewer, the system will prompt the user to apply the mandatory classification value.

Either one or more than one classification value may be appropriate to apply to a project. You can specify how many classification values may be applied to each entity in the Maximum Selectable box. Note that you will need to enable **Multiple selections** before the Maximum selectable option is enabled. If you enable **Mandatory** for the classification, the user must apply a value from this classification to the entity (either contact or project) if they attempt to add or edit classification values.

You can use classification to find projects or contacts with a common value, and to generate lists of projects. From a project list, you can also generate the Project Summary Report.

To create a classification:

1. Select the **Add Classification** option from the menu.
2. Enter a classification name
3. Select the Entity (either Project or Contact)
4. Select **Add Classification Value** from the Classification Values menu
5. Enter the classification value
6. Select **OK**
7. Repeat steps 4 and 5 as many times as you require
8. Select **Save** from the floating menu

Tips:

- A classification must be active to be added to an entity
- Select the Showing active items checkbox to display Inactive items
- Click the Inactive/Active button (in the list) to change the status of a lookup
- Select the Edit option to modify the description

Commercial Readiness Index

Users with the role System Edit can create and maintain Commercial Readiness Index lookup entries.

A single Commercial Readiness Index entry can be allocated to a project and used in dashboard reports.

You can add and maintain the status of the lookup list through this option. Only active lookup items can be added to a project, however, if an item becomes inactive at a later stage, it will continue to be displayed and used in the dashboard reports.

Tips:

- Select Add from the menu to create a new lookup item
- Select the Showing active items checkbox to display Inactive items
- Click the Inactive/Active button (in the list) to change the status of a lookup
- Select the Edit option to modify the description

Maintain Export Codes

Every project has a unique export code. This code is used to record milestone processing details which can then be exported to an external finance system.

Tips:

- Select Add Export code to add an export code to the list for a new project.
- Each GL code must be unique.
- Select the Edit icon (to the right of the record in the grid) to update the export code for an existing project.
- Select the Delete icon (to the right of the record in the grid) to remove the project and export code from the list.

Maintain Keywords

Users with the role System Edit can create and maintain Keywords.

Tips:

- To create a new Keyword, select the Add Keyword option from the menu. Remember that keywords must be unique.
- To make a keyword active or inactive, select the active or inactive button in the grid.
- To edit a keyword, select the edit button. While editing a keyword you can change both the description and the status.
- Active Keywords can be allocated to a project. You can search by both active and inactive Keywords in the Project search screen using the Search box.

Milestone Report Form Mapping

Grantees can submit milestone reports by attaching a document, or by completing a form. If you require grantees to complete a form, you must map the form by specifying the program and the milestone type.

To create a milestone report form mapping:

1. Select Add milestone report form mapping from the menu.
2. Select the program, milestone type and form name
3. Select **Save** to save the mapping

Notes:

- Only forms published to the Milestone folder will be listed
- Select the Edit or Delete options to manage the mapping

Reporting Groups

Reporting groups make it easy to find and report on projects with similar characteristics. For example, you may create a reporting group for projects managed by each Grant Manager and run your reports or find your projects using this reporting group. Projects can be added to reporting groups from either the Project Viewer or from the System Settings>System Lookups>Reporting groups option.

Tips:

- Select Add Reporting Group from the menu to create a new group
- Select Add Projects (from the Projects menu) to search for projects.
- Select the Delete icon to remove a project from the reporting group.

Project Statuses

Statuses are used by the system to identify stages of the application management and project management processes. Certain statuses are required by the system and cannot be modified or deleted. Additional statuses can be created to assist you to manage your processes according to your organisational policies.

Statuses that cannot be modified will not have an inactive/active option or an Edit button.

Tips:

- Use this option to modify the status description to match your organisations processes.

Technology Readiness Index

Users with the role System Edit can create and maintain Technology Readiness Index lookup entries.

A single Technology Readiness Index entry can be allocated to a project and used in dashboard reports.

You can add and maintain the status of the lookup list through this option. Only active lookup items can be added to a project, however, if an item becomes inactive at a later stage, it will continue to be displayed and used in the dashboard reports.

Tips:

- Select **Add** from the menu to create a new lookup item
- Select the Showing active items checkbox to display Inactive items
- Click the Inactive/Active button (in the list) to change the status of a lookup
- Select the **Edit** option to modify the description

Maintain Risk Categories

Risk categories are allocated to risks recorded for a project. The categories are used for reporting purposes.

You can add and maintain the status of the lookup list through this option. Only active lookup items can be added to a project, however, if an item becomes inactive at a later stage, it will continue to be displayed and used in the dashboard reports.

Tips:

- Select **Add** from the menu to create a new lookup item
- Select the Showing active items checkbox to display Inactive items
- Click the Inactive/Active button (in the list) to change the status of a lookup
- Select the **Edit** option to modify the description

Maintain Technology Transfer Categories

Active technology transfer categories may be selected by the applicant when completing the application form, or allocated to a project in the Project Viewer.

Tips:

- Select **Add** from the menu to create a new lookup item
- Select the Showing active items checkbox to display Inactive items
- Click the Inactive/Active button (in the list) to change the status of a lookup

- Select the **Edit** option to modify the description
- The Code must be unique.

Technologies

Users with the role System Edit can create and maintain Technologies. The Technologies assigned to a project can be used in dashboard reports. You can add and maintain the status of technologies through this lookup list. Only active technologies can be added to a project, however, if a technology becomes inactive at a later stage, it will continue to be displayed and used in the reporting dashboard.

Tips:

- Select **Add** from the menu to create a new lookup item
- Select the Showing active items checkbox to display Inactive items
- Click the Inactive/Active button (in the list) to change the status of a lookup
- Select the **Edit** option to modify the description