



Project Information File Records



Project Information File (PJ)

The purpose of the Project Information File (PJ) is to record and maintain informational data for projects. This includes project type, project status, beginning and end date, and amendment records for the project. While the Project Information File was designed primarily for fixed capital outlay projects it can be used by agencies for anything deemed a project.

To maintain active projects on the project file, agencies must establish policies and procedures to ensure that activation, inactivation and deletion of projects are clearly outlined. This includes monitoring the PJ File and appropriately closing out projects in a timely manner.

Things to Consider

- When running reports, we highly recommend that you start with the DPJR10- Listing of Projects on the GL Master with no matching PJ record.
- Review the records on the GL and Grant Master Files to see if they have balances related to the Project ID.
- All balances associated with a project should be cleared before the project is marked for deletion.
- When reviewing reports, look for project records that have been on the file longer than would be typical.

Monitoring Records on the Project Information File (PJ)

1. Using a report listed in the Tools box, identify existing project records and balances.
2. Use the following questions to determine if action is needed:

TOOLS

FLAIR Reports

DPJR10 – Projects on GL Master with no matching PJ record
(DPJR01) – PJ File listing
DPJR02 – PJ Amendment File listing
DPJR07 - Trial Balance by Project within fund
DPJR071-074- Schedule of Allotment Balances related to projects (4 different reports)
DPJR08- Project LTD

IW Reports

PROJECT table
PROJORG table
PROJAMND table



Project Information File Records



Is the record valid?

- Is the project still active?
- Have all activities related to the project been finalized?

Is the record complete?

- Are all data fields required and tracked by your Agency complete?
- Is the original amount of the project referenced?

Is the record accurate?

- Does the project have balances on the GL Master File or Trial Balance reports?
- Is the project correlated to correct Contract and account codes?

3. If you answered no to any of the previous questions, action needs to be taken. You may need to:
 - a. **Delete a record** – A record status code may be changed to D to mark the record for deletion. Once the record has been marked for deletion for longer than 12 months, it will be purged during the normal purge process, each January and June.
 - b. **Update information** – Updates can be made using the PJ function in FLAIR.

For more information on how to manage Agency data, please see the Data Management Project website at <https://www.myfloridacfo.com/division/aa/state-agencies/data-management-project>