Master Projects to Sub-Projects Relationship

Roles:	Director, Project Manager
Project Status:	Pre-Planning, Planning

Financials can be viewed together by creating project relationships. This relationship would include one project as the Master Project and other projects as Sub-Projects.

Step	Task
Relate One Project to Another	
1.	Click the drop-down next to *Go To…* and select **Project Data Summary**.
2.	Click the **Edit Project** command button.
3.	Select one option in the *Project Grouping* section: • This project is a standalone project. • This project is a master project. • This project is a sub-project of; select the related Master Project.
4.	Click the **Continue** command button.
5.	Click the **Confirm** command button.
Auto-Create a Master Project (Director only)	
1.	Click the drop-down next to *Go To…* and select **Project Data Summary**.
2.	Click the **Create Master Project** command button.
3.	Select the option within **Do you want to**:
4.	Click the **Create Master Project** command button.
5.	Enter information in all required fields.
6.	Click the **Continue** command button.
7.	Click the **Confirm** command button.
View Master Project Budgets with Sub-Project Budgets	
1.	Within the Master Project, click the drop-down next to *Go To…* and select **Project Budget**.
2.	Click the radio button next to **Consolidated View**.
3.	Click the radio button next to **Budget for this Project** to view the Master Project's Budget only.
Transfer Budget Lines Among Related Projects (Director only)	
1.	Within the Master Project, click the drop-down next to *Go To…* and select **Master to Sub Budget Transfer**.
2.	Click the **Edit Master & Sub-Project Budgets** command button.
3.	Move the amount to transfer.
4.	Click the **Save Changes** command button.

Additional Information:

- The Relationship between Master and Sub-Projects
  - The Project Financials for the Master project summarizes financials for the Master Project and its Sub-Projects in a single aggregate view. Those relationships can be viewed on the Project Financials page of the Master Project. The details of individual projects can be viewed on the Sub-Project's project financials, budget, or contracts pages.
  - The Director must manually move money from the Master Project's budget to a Sub-Project, subtracting from one budget and adding to another.

- Convert a Standalone Project to a Master Project
  - The budget allocations in the most recent version for the Project will be rolled up into its x0000 budget levels.
  - The rolled-up budget allocations in the x0000 levels for the project will be transferred to the new Master Project.
  - The budget Proposed Budget values, forecast amounts, and the future contract values in the project for all budget codes in the most recent budget version will be set to zero.
  - The project will be automatically authorized and time-stamped with the Director's initials.