

## **PROJECTS & GRANTS MANAGEMENT (PGM)**

### **Data Conversion Template for Non-GUS Departments**

## Table of Contents

<b>TEMPLATE OVERVIEW</b>	<b>2</b>
Existing Chart String Data	2
New Project Fields	2
Combination Fields	4
Auto-Populate Fields	5
<b>COMPLETING THE NEW DATA FIELDS</b>	<b>6</b>
[Step 1] PGM Eligibility	6
[Step 1.1] NonPGM_Work_Type	7
[Step 2] PGM_Project_Type	8
[Step 2.1] Project Type = “Cost Share”	8
[Step 2.2] Project Type = “Internal Award”	9
[Step 2.3] All Other Project Types	10
[Step 3] PGM_FabricationBudget	10
[Step 4] PGM_ExternalFunding	10
[Step 5] PGM_DeptManagerName and PGM_DeptManagerID	11
[Step 6] PGM_LeadPI and PGM_LeadPIID	11
[Step 7] Project Name, Project Start Date, and Project End Date	12
[Step 8] Status	12
<b>TROUBLESHOOTING AND SUPPORT</b>	<b>13</b>

## TEMPLATE OVERVIEW

The data template is a Google Sheets file that contains existing Project data in non-GUS financial systems and new Project fields.

### Existing Chart String Data

The existing data extracted from non-GUS financial systems are in the columns on the left of the file (similar to the image below), including but not limited to the 4-letter department code, project code, account, and fund. The data in these columns are Project information that can be used for reference as needed.

### Existing data for reference

Dept Code	Project Code	Account	Fund	PGM Eligible	NonPGM Work_Type	PGM Project_Type	PGM Extramural_Fund	PGM Internal_Award_Type	PGM Fabrication_Budget	PGM External_Funding	PGM DeptMgr_Name	PGM DeptMgr_ID	PGM LeadPI_Name	PGM LeadPI_ID	Project Name	Project Start Date	Project End Date	Data Entry Status
AASP		403991	07427	▼	▼	▼	▼	▼	▼	▼	▼	▼	▼	▼				Incomplete
AASP		443991	07427	▼	▼	▼	▼	▼	▼	▼	▼	▼	▼	▼				Incomplete
AASP		403991	18082	▼	▼	▼	▼	▼	▼	▼	▼	▼	▼	▼				Incomplete
AASP		403991	18083	▼	▼	▼	▼	▼	▼	▼	▼	▼	▼	▼				Incomplete
AASP		403691	19900	▼	▼	▼	▼	▼	▼	▼	▼	▼	▼	▼				Incomplete
AASP		403694	19900	▼	▼	▼	▼	▼	▼	▼	▼	▼	▼	▼				Incomplete
AASP		403695	19900	▼	▼	▼	▼	▼	▼	▼	▼	▼	▼	▼				Incomplete
AASP		403698	19900	▼	▼	▼	▼	▼	▼	▼	▼	▼	▼	▼				Incomplete
AASP		403699	19900	▼	▼	▼	▼	▼	▼	▼	▼	▼	▼	▼				Incomplete

### New Project Fields

Referencing the same image, columns E to R are new fields related to each Project that we are to focus on for this data conversion and validation effort.

### New fields for data entry

Dept Code	Project Code	Account	Fund	PGM Eligible	NonPGM Work_Type	PGM Project_Type	PGM Extramural_Fund	PGM Internal_Award_Type	PGM Fabrication_Budget	PGM External_Funding	PGM DeptMgr_Name	PGM DeptMgr_ID	PGM LeadPI_Name	PGM LeadPI_ID	Project Name	Project Start Date	Project End Date	Data Entry Status
AASP		403991	07427	▼	▼	▼	▼	▼	▼	▼	▼	▼	▼	▼				Incomplete
AASP		443991	07427	▼	▼	▼	▼	▼	▼	▼	▼	▼	▼	▼				Incomplete
AASP		403991	18082	▼	▼	▼	▼	▼	▼	▼	▼	▼	▼	▼				Incomplete
AASP		403991	18083	▼	▼	▼	▼	▼	▼	▼	▼	▼	▼	▼				Incomplete
AASP		403691	19900	▼	▼	▼	▼	▼	▼	▼	▼	▼	▼	▼				Incomplete
AASP		403694	19900	▼	▼	▼	▼	▼	▼	▼	▼	▼	▼	▼				Incomplete
AASP		403695	19900	▼	▼	▼	▼	▼	▼	▼	▼	▼	▼	▼				Incomplete
AASP		403698	19900	▼	▼	▼	▼	▼	▼	▼	▼	▼	▼	▼				Incomplete
AASP		403699	19900	▼	▼	▼	▼	▼	▼	▼	▼	▼	▼	▼				Incomplete

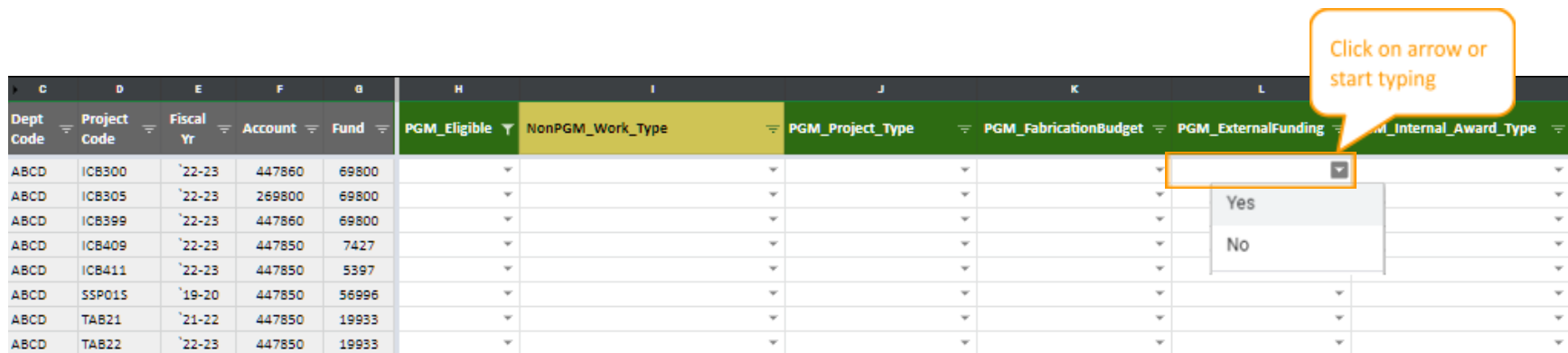
The new Project fields are:

FIELD	DESCRIPTION
PGM_Eligible	This field is to notate whether the Project is eligible for converting to Oracle Financial Cloud (OFC). For Project criteria, see <a href="#">Project Conversion Instructions</a> .
NonPGM_Work_Type	If the Project is not eligible for OFC conversion, enter the Work Type.
PGM_Project_Type	If the Project is eligible for OFC conversion, enter the Project Type. For definitions of each Project Type, see <a href="#">Project Conversion Instructions</a> .
PGM_Extramural_Fund	For all “Cost Share” project types, enter the associated Extramural Fund numbers for the prime award in this field. This will enable the grouping of all associated projects under one award in PGM. The fund ranges are as follows: <ul style="list-style-type: none"> <li>• 18200 – 18999 State of CA C&amp;Gs</li> <li>• 20600– 20999 Local &amp; Other Government C&amp;Gs</li> <li>• 21000– 33999 Federal C&amp;Gs</li> <li>• 57000– 59999 Private C&amp;Gs</li> <li>• 77150– 77999 ARRA C&amp;Gs (no active awards here)</li> <li>• 78000– 79999 Private Contracts &amp; Micro Awards</li> </ul>
PGM_Internal_Award_Type	If the Project is an Internal Award, enter the Internal Award Type in this field.
PGM_FabricationBudget	This field is to notate whether the Project includes funds allocated specifically to build a fabrication. Fabrication equipment is defined as non-expendable, tangible, personal property, physically constructed by a University activity, which has a total acquisition cost of \$5,000 or more, is free-standing, is complete in itself, does not lose its identity when affixed to or installed in other property, and is expected to be used by the University for one year or more.
PGM_ExternalFunding	This field is to notate whether the Project has External Funding, such as funds committed by another department (e.g. dean, EVC, BUDG...etc.). This field is expected to be marked as “Yes” for Cost Share or Faculty Start-Up Projects, and any other activity funded on a cost reimbursement basis, or funded based on a written/formalized commitment from another office.
PGM_DeptManagerName	The Department Manager is the department administrator or administrative contact person for the Project.
PGM_DeptManagerID	This field is the Department Manager’s employee ID and will automatically populate based on the entry in the previous field.

PGM_LeadPI	Enter the name of the Lead PI for the Project.
PGM_LeadPIID	This field is the Lead PI's employee ID and will automatically populate based on the entry in the previous field.
Project Name	This is a text field. Enter the name of the Project.
Project Start Date	This date field is in dd/mm/yy format.
Project End Date	This date field is in dd/mm/yy format. If there is not an end date, enter 99/99/99.
Sponsor	This field is optional. Enter the Sponsor information if applicable.
Additional Reference	This field is optional. Enter additional reference if applicable.

### Combination Fields

The fields with a drop down arrow are combination fields, which the user can click on the arrow and select from the list of options or start typing and the matching words will appear. Using the image below as an example, click on the drop down arrow under “PGM\_ExternalFunding” and the list of valid options, in this case “Yes” and “No” will appear. The user can finish typing the word and click “enter,” or select from the drop down list to complete the entry.



Dept Code	Project Code	Fiscal Yr	Account	Fund	PGM_Eligible	NonPGM_Work_Type	PGM_Project_Type	PGM_FabricationBudget	PGM_ExternalFunding	Internal_Award_Type
ABCD	ICB300	'22-23	447860	69800						
ABCD	ICB305	'22-23	269800	69800						
ABCD	ICB399	'22-23	447860	69800						
ABCD	ICB409	'22-23	447850	7427						
ABCD	ICB411	'22-23	447850	5397						
ABCD	SSP015	'19-20	447850	56996						
ABCD	TAB21	'21-22	447850	19933						
ABCD	TAB22	'22-23	447850	19933						

## Auto-Populate Fields

The fields without the drop down arrow will automatically populate based on entries in the prior field(s).

- The PGM\_DeptManagerID will automatically populate the employee ID per entry in the PGM\_DeptManagerName field.
- The PGM\_LeadPIID will automatically populate the employee ID per entry in the PGM\_LeadPI field.

Auto-populate fields

Dept Code	Project Code	Fiscal Yr	Account	Fund	PGM_Eligible	NonPGM_Work_Type	PGM_Project_Type	PGM_Extramural_Fund	PGM_Internal_Award_Type	PGM_FabricationBudget	PGM_ExternalFunding	PGM_DeptManagerName	PGM_DeptManagerID	PGM_LeadPI	PGM_LeadPIID	Status
XYZZ	ICB599	'21-22	447850	19933	▼	▼	▼	▼	▼	▼	▼	▼	▼	▼	▼	Incomplete
XYZZ	ICB599	'22-23	447850	19933	▼	▼	▼	▼	▼	▼	▼	▼	▼	▼	▼	Incomplete
XYZZ	ICBGG01	'21-22	447850	19933	▼	▼	▼	▼	▼	▼	▼	▼	▼	▼	▼	Incomplete
XYZZ	ICBGG01	'22-23	447850	19933	▼	▼	▼	▼	▼	▼	▼	▼	▼	▼	▼	Incomplete
XYZZ	ICBMO1	'21-22	447850	19933	▼	▼	▼	▼	▼	▼	▼	▼	▼	▼	▼	Incomplete
XYZZ	ICBRJ1	'21-22	447850	19933	▼	▼	▼	▼	▼	▼	▼	▼	▼	▼	▼	Incomplete

- Data Entry Status - Note, this is not a Project data field. Rather, it is a reference column added for data validation. The status of whether the required data fields are “incomplete” or “complete” will automatically populate based on the entries.

## COMPLETING THE NEW DATA FIELDS

This section will outline the steps for completing the new data fields related to Projects. The general approach for completing the new data fields is to follow the color boxes -- yellow or green fields require information, and gray fields require no entries -- from left to right.

Prior to entering data, review the 4-letter department codes in column C and make sure all of your departments are accurately listed.

### Review department codes

Dept Code	Project Code	Fiscal Yr	Account	Fund	PGM_Eligible	NonPGM_Work_Type	PGM_Project_Type
ABCD	ICB300	'22-23	447860	69800	▼		▼
ABCD	ICB305	'22-23	269800	69800	▼		▼
ABCD	ICB399	'22-23	447860	69800	▼		▼
ABCD	ICB409	'22-23	447850	7427	▼		▼
ABCD	ICB411	'22-23	447850	5397	▼		▼
ABCD	SSP015	'19-20	447850	56996	▼		▼
ABCD	TAB21	'21-22	447850	19933	▼		▼
ABCD	TAB22	'22-23	447850	19933	▼		▼
ABCD	TESTFC	'21-22	447000	19933	▼		▼
ABCD	UCPATH	'18-19	447001	19934	▼		▼
ABCD	UCPATH	'19-20	447002	19935	▼		▼
MNOP	COP015	'22-23	447850	56996	▼		▼
MNOP	ICB411	'21-22	447850	5397	▼		▼
MNOP	ICB412	'22-23	447850	68800	▼		▼

### [Step 1] PGM Eligibility

Determine whether the Project is eligible for PGM conversion. The entry in the “PGM\_Eligible” field will start the workflow for completing the other data fields.

- If eligible, select or enter “Yes” and the required fields will change to green. Go to [Step 2].
- If not eligible, select or enter “No” and the required fields will change to yellow.

[Step 1.1] NonPGM\_Work\_Type

When a Project is not eligible for PGM conversion, the "NonPGM\_Work\_Type" field will change to yellow and an entry is required. Select or enter the required information. This will complete the fields for a Project that is not eligible for PGM conversion.

C	D	E	F	G	H	I	K	L	M
Dept Code	Project Code	Fiscal Yr	Account	Fund	PGM_Eligible	NonPGM_Work_Type	PGM_Extramural_Fund	PGM_Internal_Award_Type	PGM_FabricationBudget
ABCD	ICB300	'22-23	447860	69800	No				
ABCD	ICB305	'22-23	269800	69800					
ABCD	ICB399	'22-23	447860	69800					
ABCD	ICB409	'22-23	447850	07427					
ABCD	ICB411	'22-23	447850	05397					
ABCD	SSP015	'19-20	447850	56996					
ABCD	TAB21	'21-22	447850	19933					
ABCD	TAB22	'22-23	447850	19933					
ABCD	TESTFC	'21-22	447000	19933					
ABCD	UCPATH	'18-19	447001	19934					
ABCD	UCPATH	'19-20	447002	19935					
MNOP	ODP015	'22-23	447850	56996					
MNOP	ICB411	'21-22	447850	5397					
MNOP	ICB412	'22-23	447850	68800					
MNOP	ICB413	'22-23	447850	05397					
MNOP	ICB414	'22-23	447850	07427					
MNOP	ICB510	'21-22	447850	19933					
MNOP	ICB510	'22-23	447850	19933					
MNOP	ICB512	'21-22	447850	19933					
MNOP	ICB512	'22-23	447850	19933					
MNOP	ICB513	'21-22	447850	19933					
MNOP	ICB513	'22-23	447850	19933					
MNOP	ICB514	'21-22	447850	19933					
MNOP	ICB514	'22-23	447850	19933					

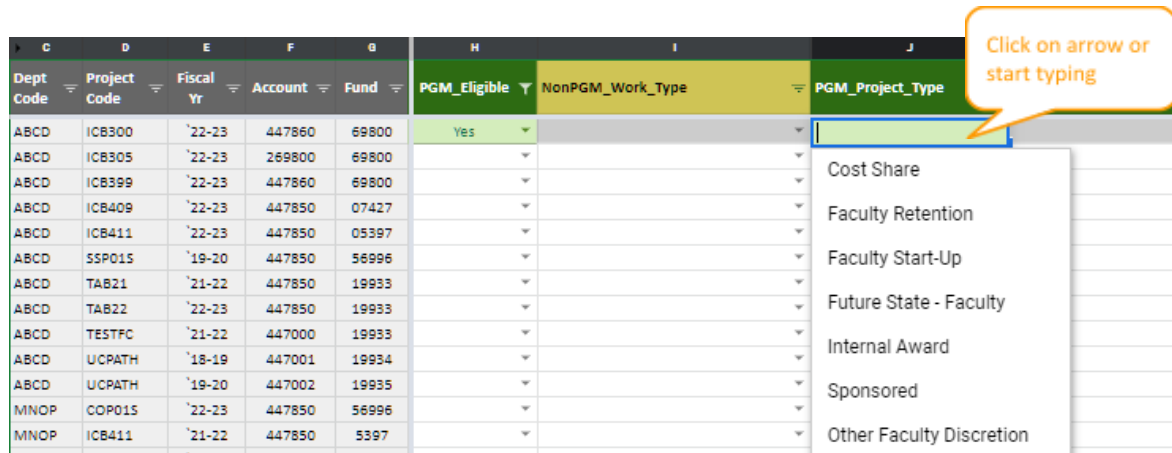
Click on arrow or start typing

Agency Accounts  
 Course Material Fee  
 Departmental Operating  
 Faculty Recruitment  
 Grad Recruitment  
 I & R Centers  
 Instructional Support  
 Revenue Agreements  
 Seminars, Lectures & Conferences  
 Student Aid & Fellowships  
 Sub-Unit/Center Operating  
 Summer Session Revenue  
 Other Gifts & Endowments (not directly allocated to a faculty member)



## [Step 2] PGM\_Project\_Type

When a Project is eligible for PGM conversion, the next step is to select or enter the “PGM\_Project\_Type.”



Dept Code	Project Code	Fiscal Yr	Account	Fund	PGM_Eligible	NonPGM_Work_Type	PGM_Project_Type
ABCD	ICB300	'22-23	447860	69800	Yes		
ABCD	ICB305	'22-23	269800	69800			
ABCD	ICB399	'22-23	447860	69800			
ABCD	ICB409	'22-23	447850	07427			
ABCD	ICB411	'22-23	447850	05397			
ABCD	SSP015	'19-20	447850	56996			
ABCD	TAB21	'21-22	447850	19933			
ABCD	TAB22	'22-23	447850	19933			
ABCD	TESTFC	'21-22	447000	19933			
ABCD	UCPATH	'18-19	447001	19934			
ABCD	UCPATH	'19-20	447002	19935			
MNOP	COP015	'22-23	447850	56996			
MNOP	ICB411	'21-22	447850	5397			

Click on arrow or start typing

### [Step 2.1] Project Type = “Cost Share”

If “Cost Share,” the “PGM\_Extramural\_Fund” is required. Enter the associated Extramural Fund number for the prime award in this field. This will enable the grouping of all associated projects under one award in PGM.

The “PGM\_Extramural\_Fund” is a 5-digit fund number within the following ranges:

- 18200 - 18999 State of CA C&Gs
- 20600 - 20999 Local & Other Government C&Gs
- 21000 - 33999 Federal C&Gs
- 57000 - 59998 Private C&Gs
- 77150 - 77999 ARRA C&Gs (no active awards here)
- 78000 - 79998 Private Contracts & Micro Awards

Note: This field may take a few seconds to load, as the leading edge search feature is processing the entry with data validation.

Dept Code	Project Code	Fiscal Yr	Account	Fund	PGM_Eligible	NonPGM_Work_Type	PGM_Project_Type	PGM_Extramural_Fund	PGM
ABCD	ICB300	'22-23	447860	69800	Yes		Cost Share	182	
ABCD	ICB305	'22-23	269800	69800				18200	
ABCD	ICB399	'22-23	447860	69800				18201	
ABCD	ICB409	'22-23	447850	07427				18202	
ABCD	ICB411	'22-23	447850	05397				18203	
ABCD	SSP015	'19-20	447850	56996				18204	
ABCD	TAB21	'21-22	447850	19933				18205	
ABCD	TAB22	'22-23	447850	19933					
ABCD	TESTFC	'21-22	447000	19933					
ABCD	UCPATH	'18-19	447001	19934					
ABCD	UCPATH	'19-20	447002	19935					
MNOP	COP015	'22-23	447850	56996					

Type in the fund number

[Step 2.2] Project Type = "Internal Award"

If "Internal Award," the "PGM\_Internal\_Award\_Type" is required.

Dept Code	Project Code	Fiscal Yr	Account	Fund	PGM_Eligible	NonPGM_Work_Type	PGM_Project_Type	PGM_Extramural_Fund	PGM_Internal_Award_Type	M_ExternalFunding
ABCD	ICB300	'22-23	447860	69800	Yes		Internal Award			
ABCD	ICB305	'22-23	269800	69800						
ABCD	ICB399	'22-23	447860	69800						
ABCD	ICB409	'22-23	447850	07427						
ABCD	ICB411	'22-23	447850	05397						
ABCD	SSP015	'19-20	447850	56996						
ABCD	TAB21	'21-22	447850	19933						
ABCD	TAB22	'22-23	447850	19933						
ABCD	TESTFC	'21-22	447000	19933						
ABCD	UCPATH	'18-19	447001	19934						
ABCD	UCPATH	'19-20	447002	19935						
MNOP	COP015	'22-23	447850	56996						
MNOP	ICB411	'21-22	447850	5397						
MNOP	ICB412	'22-23	447850	68800						
MNOP	ICB413	'22-23	447850	5397						
MNOP	ICB414	'22-23	447850	7427						
MNOP	ICB510	'21-22	447850	19933						
MNOP	ICB510	'22-23	447850	19933						
MNOP	ICB512	'21-22	447850	19933						
MNOP	ICB512	'22-23	447850	19933						
MNOP	ICB513	'21-22	447850	19933						
MNOP	ICB513	'22-23	447850	19933						
MNOP	ICB514	'21-22	447850	19933						
MNOP	ICB514	'22-23	447850	19933						
XYZZ	ICB599	'21-22	447850	19933						
XYZZ	ICB599	'22-23	447850	19933						

Click on arrow or start typing

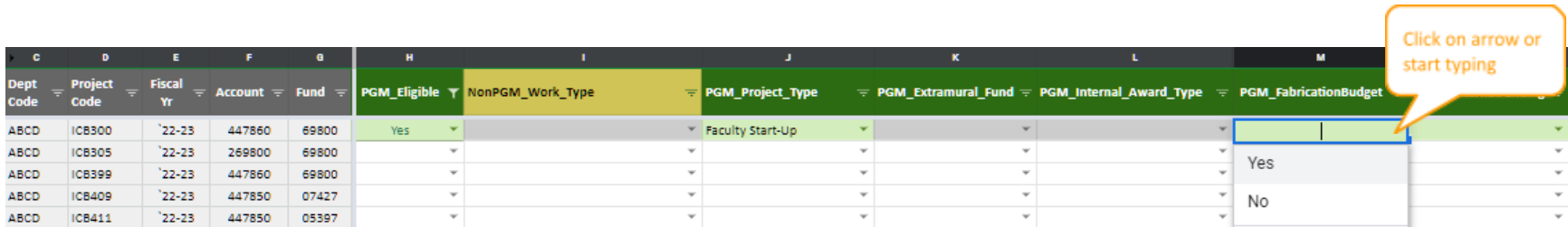
- Academic Senate
- Central Coast Regional Equity Initiative
- Chancellor's Faculty Research
- Coastal Funds
- EVC Faculty Diversity Award
- FOG
- FRAP
- Non-Senate Faculty Professional Grant
- PROWESS
- RAP
- Summer Culture & Community Grant Program
- TGIF
- URCA
- Other UC/UCOP Awards (non-SPO)

### [Step 2.3] All Other Project Types

If “Faculty Retention,” “Faculty Start-Up,” “Future State - Faculty,” “Sponsored,” or “Other Faculty Discretion,” go to [Step 3].

### [Step 3] PGM\_FabricationBudget

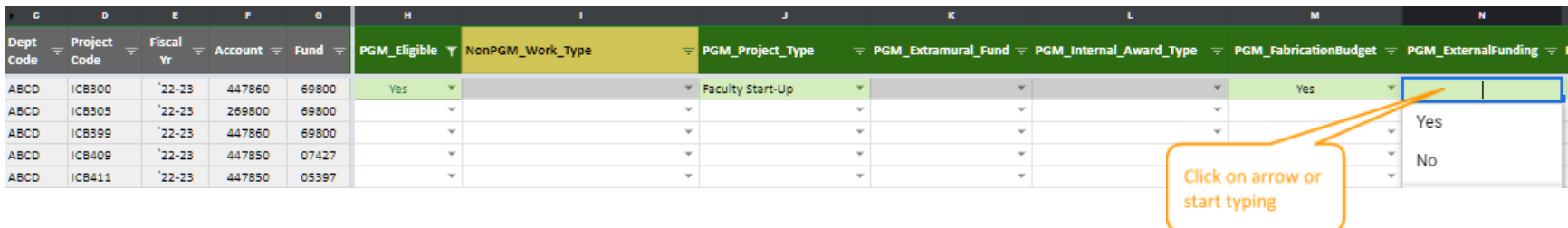
Determine whether the Project includes funds allocated specifically to build a fabrication. Then select or enter “Yes” or “No” for this field.



Dept Code	Project Code	Fiscal Yr	Account	Fund	PGM_Eligible	NonPGM_Work_Type	PGM_Project_Type	PGM_Extramural_Fund	PGM_Internal_Award_Type	PGM_FabricationBudget
ABCD	ICB300	'22-23	447860	69800	Yes		Faculty Start-Up			
ABCD	ICB305	'22-23	269800	69800						
ABCD	ICB399	'22-23	447860	69800						Yes
ABCD	ICB409	'22-23	447850	07427						No
ABCD	ICB411	'22-23	447850	05397						

### [Step 4] PGM\_ExternalFunding

Determine whether External Funding is applicable for the Project, then select or enter “Yes” or “No” for this field.



Dept Code	Project Code	Fiscal Yr	Account	Fund	PGM_Eligible	NonPGM_Work_Type	PGM_Project_Type	PGM_Extramural_Fund	PGM_Internal_Award_Type	PGM_FabricationBudget	PGM_ExternalFunding
ABCD	ICB300	'22-23	447860	69800	Yes		Faculty Start-Up			Yes	
ABCD	ICB305	'22-23	269800	69800							
ABCD	ICB399	'22-23	447860	69800							Yes
ABCD	ICB409	'22-23	447850	07427							No
ABCD	ICB411	'22-23	447850	05397							

External funding are funds committed by another department, for example: dean, EVC, BUDG...etc. This field is expected to be marked as “Yes” for Cost Share or Faculty Start-Up Projects, and any other activity funded on a cost reimbursement basis, or funded based on a written or formalized commitment from another office.

[Step 5] PGM\_DeptManagerName and PGM\_DeptManagerID

The “PGM\_DeptManagerName” field has a leading edge search function built-in to find names from the employees list. Enter the PGM Department Manager’s name, either in [*lastname, firstname*] format or type in partial name and the words with matching results will appear in the list of selections.

Dept Code	Project Code	Fiscal Yr	Account	Fund	PGM_Eligible	NonPGM_Work_Type	PGM_Project_Type	PGM_Extramural_Fund	PGM_Internal_Award_Type	PGM_FabricationBudget	PGM_ExternalFunding	PGM_DeptManagerName	PGM_DeptManagerID
ABCD	ICB300	'22-23	447860	69800	Yes		Faculty Start-Up			Yes	Yes	Kittle	
ABCD	ICB305	'22-23	269800	69800								Kittle, Jane	
ABCD	ICB399	'22-23	447860	69800								Kittler, Wolf	
ABCD	ICB409	'22-23	447850	07427									
ABCD	ICB411	'22-23	447850	05397									
ABCD	SSP015	'19-20	447850	56996									

**Note:** This field may take a few seconds to load, as the leading edge search feature is processing the entry with data validation.

When a matching name is entered or selected, the “PGM\_DeptManagerID” field will automatically populate the employee ID.

Dept Code	Project Code	Fiscal Yr	Account	Fund	PGM_Eligible	NonPGM_Work_Type	PGM_Project_Type	PGM_Extramural_Fund	PGM_Internal_Award_Type	PGM_FabricationBudget	PGM_ExternalFunding	PGM_DeptManagerName	PGM_DeptManagerID
ABCD	ICB300	'22-23	447860	69800	Yes		Faculty Start-Up			Yes	Yes	Kittle, Jane	123123123
ABCD	ICB305	'22-23	269800	69800									
ABCD	ICB399	'22-23	447860	69800									

[Step 6] PGM\_LeadPI and PGM\_LeadPIID

The “PGM\_LeadPI” and “PGM\_LeadPIID” fields function the same way as [Step 5].

Dept Code	Project Code	Fiscal Yr	Account	Fund	PGM_Eligible	NonPGM_Work_Type	PGM_Project_Type	PGM_Extramural_Fund	PGM_Internal_Award_Type	PGM_FabricationBudget	PGM_ExternalFunding	PGM_DeptManagerName	PGM_DeptManagerID	PGM_LeadPI	PGM_LeadPIID
XYZZ	ICB599	'21-22	447850	19933	Yes		Faculty Start-Up			Yes	Yes	Kittle, Jane	123123123	Incandela, Joseph	100200300
XYZZ	ICB599	'22-23	447850	19933											
XYZZ	ICBGD1	'21-22	447850	19933											

[Step 7] Project Name, Project Start Date, and Project End Date

Complete the entries for Project Name, Project Start Date, and Project End Date. If there is not an end date, enter "99/99/99."

[Step 8] Status

Reference the "Date Entry Status" field for completion of required fields.

- If "incomplete," make sure there are entries in the yellow / green fields and blanks in the gray fields.
- If "complete," go to the next Project Code and start again from [Step 1].

Dept Code	Project Code	Fiscal Yr	Account	Fund	PGM_Eligible	NonPGM_Work_Type	PGM_Project_Type	PGM_Extramural_Fund	PGM_Internal_Award_Type	PGM_FabricationBudget	PGM_ExternalFunding	PGM_DeptManagerName	PGM_DeptManagerID	PGM_LeadPI	PGM_LeadPIID	Status
XYZZ	ICB599	21-22	447850	19933	Yes		Faculty Start-Up			Yes	Yes	Kitile, Jane	123123123	Incardela, Joseph	100200300	Complete
XYZZ	ICB599	22-23	447850	19933												Incomplete
XYZZ	ICBGG01	21-22	447850	19933												Incomplete
XYZZ	ICBGG01	22-23	447850	19933												Incomplete
XYZZ	ICBMO1	21-22	447850	19933												Incomplete
XYZZ	ICBRJ1	21-22	447850	19933												Incomplete

Auto-populate

## TROUBLESHOOTING AND SUPPORT

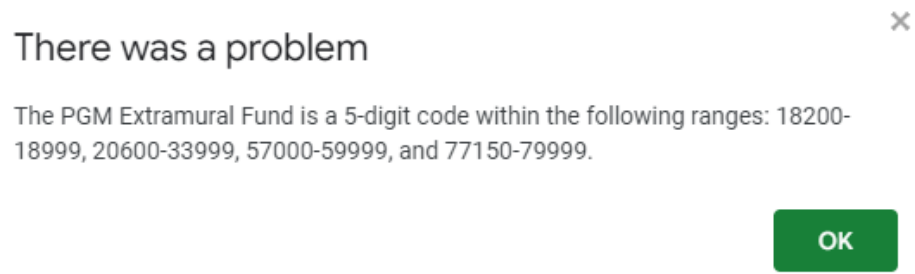
**Q: Why do some fields already have entries when I receive the file?**

A: You may notice some rows have pre-populated entries in the “PGM\_Eligible” and “PGM\_Project\_Type” fields. These are Sponsored Projects based on the fund numbers in column G.

C	D	E	F	G	H	I	J
Dept Code	Project Code	FY	Account	Fund	PGM_Eligible	NonPGM_Work_Type	PGM_Project_Type
AAAA	02SBTV	'19-20	487852	25509	Yes		Sponsored
AAAA	02SRTV	'21-22	487852	25509	Yes		Sponsored
AAAA	03CIT	'22-23	487853	25509	Yes		Sponsored
ABCD	ICB300	'22-23	447860	69800			
ABCD	ICB305	'22-23	269800	69800			
ABCD	ICB399	'22-23	447860	69800			
ABCD	ICB409	'22-23	447850	07427			
ABCD	ICB411	'22-23	447850	05397			
ABCD	PKN01R	'22-23	447850	23798	Yes		Sponsored
ABCD	PKN02	'22-23	447850	23771	Yes		Sponsored

**Q: What will happen if I enter a PGM External Fund code that is not within the valid ranges?**

A: When a fund code is not within the valid ranges, the form will not accept the entry and a prompt will pop-up. For example, if the entry is “12345,” which is not a valid fund code, this message will appear:



**Q: What if I need to change PGM\_Eligible from “Yes” to “No” or vice versus?**

A: When changing the PGM\_Eligible entry, you will notice color changes within the same row. Make sure to enter information in the fields that changed to yellow or green and also check that the gray fields are blank.

Notes:

- As a rule of thumb, fill in the data fields from left to right.
- To delete an entry, click on the box, then click the “delete” key on your keyboard.

**Q: What if my answer is not included in the list of options to choose from?**

A: The data validation conditions are set by pre-defined rules. If you have an exception or have a need to adjust the selections, please send an email to the [PGM Conversion Leads](mailto:fmm-pgm-conv-leads@farm.ucsb.edu) (fmm-pgm-conv-leads@farm.ucsb.edu) for assistance.

**Q: What if the leading edge search for the “PGM\_DeptManagerName” and/or the “PGM\_LeadPI” cannot locate the name I typed in?**

A: Below are a few checks to troubleshoot this error.

- Are there typos?
- Have you tried typing the [*lastname, firstname*] format?
- Does the employee go by a different name or a nickname?

If you still cannot locate the correct name, please send an email to the [PGM Conversion Leads](mailto:fmm-pgm-conv-leads@farm.ucsb.edu) (fmm-pgm-conv-leads@farm.ucsb.edu) for assistance. It could be that the employee is a recent hire and we will need to update the employees list for this template.

**Q: What if the employee ID does not automatically populate?**

A: Please send an email to the [PGM Conversion Leads](mailto:fmm-pgm-conv-leads@farm.ucsb.edu) (fmm-pgm-conv-leads@farm.ucsb.edu) for assistance.

For other questions or support, please send an email to the [PGM Conversion Leads](mailto:fmm-pgm-conv-leads@farm.ucsb.edu) (fmm-pgm-conv-leads@farm.ucsb.edu) for assistance.