GUS Project Conversion

PGM Design Overview & Background

Project Types housed in PGM

We think of a PGM project as a specified body of work with a start and an end date. In addition, we defer to a list of project criteria (see below) to further refine which projects will be housed in PGM.

Project Criteria

We've simplified project criteria to be a series of Yes or No questions.
If any of these answers are Yes, the project should be in PGM.

Criteria	PGM Project?
Is this externally funded by an award notification or other agreement made through the Office of Research (i.e., sponsored project, which is a policy-defined activity)?	Yes
Is this capitalizable and/or a construction project or feasibility study to be managed by FM or D&CS?	Yes
Is this funding allocated to a specific faculty member or PI? And will it require PI dashboard level reporting and recurring transactional approval from PMs and PIs?	Yes
Is this body of work defined for a period of time during which there will be a significant number of transactions, **plus** one of the following? A) Multi-fiscal year Inception-to-Date reporting required B) Internal reporting needs are not met by referencing another CCoA segment value	Yes (optional)

Based on our understanding of UCSB activities, there are four types of projects currently tracked in GUS that we expect will land in PGM:

Faculty Funds Projects	Sponsored Projects
This type of project includes internal funding dedicated to a specified faculty member, such as start-up, retention, research gifts, etc.	Sponsored Projects are externally funded projects (like projects sponsored by NIH, for example).
Internal Awards	Fabrications (Sponsored or Internally Funded)
Internal Awards are competitively awarded to faculty members using UCSB funds and require additional tracking, such as Academic Senate awards.	Fabricated equipment is comprised of individual components that are fabricated into a single functional unit, and are capitalized as a single asset for a combined total cost in excess of $5,000.

Distinct PGM Project Types Currently Housed in GUS:

Sponsored: A project that is externally funded by an award notification or other agreement made through the Office of Research (i.e., sponsored project, which is a policy-defined activity).

Cost Share: Projects used to track mandatory or voluntary cost sharing identified in the project proposal that represents a commitment by UCSB that must be fulfilled if the proposal is accepted and awarded, with an obligation to document the financial contribution provided to the sponsored projects.

Resource Allocation Commitment: Projects used to track voluntary resource allocations associated with sponsored projects that are not committed or quantified to the sponsor, also referred to as "uncommitted cost share". These projects will not be tied to the sponsored award in any way, and will be treated as faculty discretionary projects.

Faculty Start-Up: Projects used to track formal committed funds provided to a faculty member upon hire. These projects directly reflect commitment documentation issued jointly by the EVC, Dean(s), and the Chancellor's Office.

Faculty Retention: Projects used to track formal committed funds provided to a faculty as a part of an effort to retain them when they have obtained an employment offer elsewhere. These projects directly reflect commitment documentation issued by Dean(s) and/or the EVCs office.

Other Faculty Discretionary: Projects used to track various funds allocated directly to a faculty member for their use.

Internal Award: Projects used to track funds allocated to a faculty member as the result of a competitive internal proposal process. Projects categorized as "internal awards" typically require additional reporting, have a specified period of performance, spending restrictions, etc.

Current State Projects not housed in Future State PGM

Other existing projects housed in GUS or defined in the GMC that do not fit the project criteria will likely not be tracked in PGM. That said, our goal is to not lose any necessary visibility or tracking, so we are hoping to identify common themes in what needs to be tracked so that we can help find them a home in the new CCOA. See below for examples of how existing GUS projects may be tracked in the future using the new CCOA:
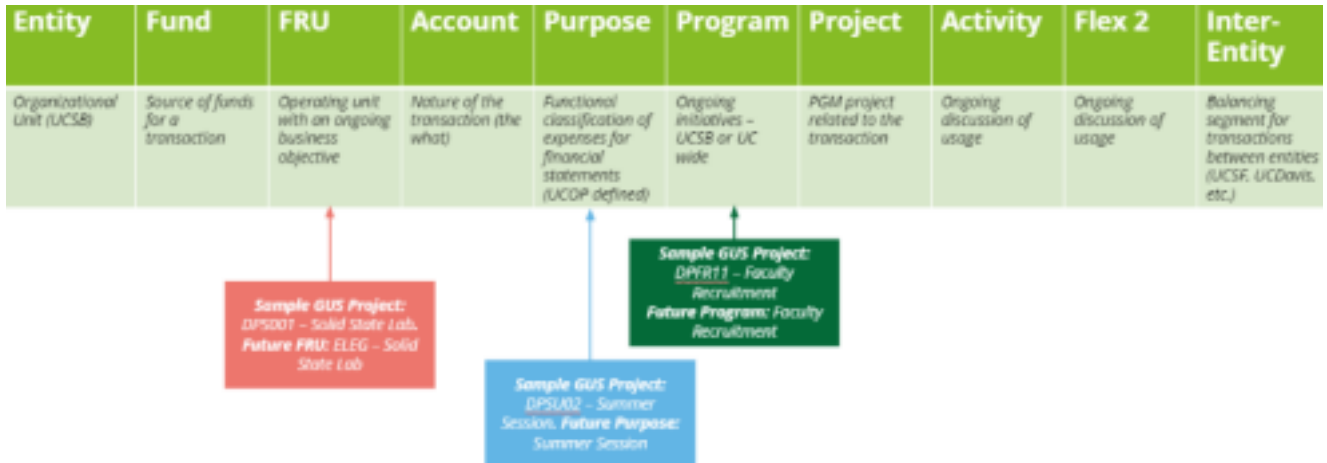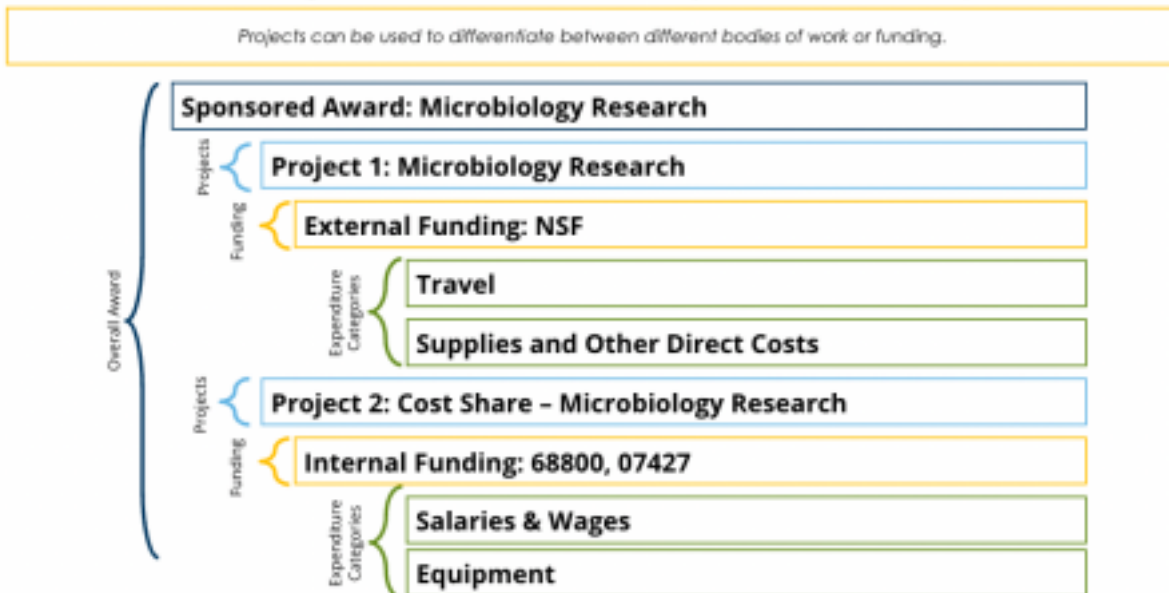

Future State Design

The vision is to create a high level award umbrella to group all associated 'projects' to enable consistent and consolidated reporting. This is a standard design for sponsored projects, and we plan to adopt the same structure for non-sponsored projects (including faculty funds, capital, and internal awards) as well. See below for an illustration:
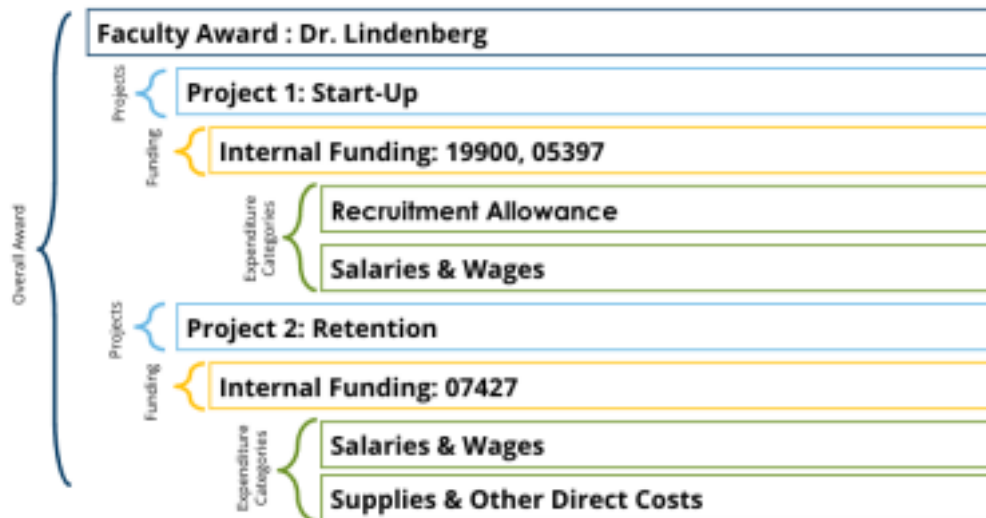
Future Design – Non-Sponsored Faculty Awards

As a reminder, our original design focused on the Award - Project – Task relationship

Projects can be used to differentiate between different bodies of work or funding. In this design, each project can be funded by multiple, internal funding sources.

Faculty Award : Dr. Lindenberg

Projects
Project 1: Start-Up

Funding
Internal Funding: 19900, 05397

Expenditure Categories
Recruitment Allowance

Salaries & Wages

Projects
Project 2: Retention

Funding
Internal Funding: 07427

Expenditure Categories
Salaries & Wages

Supplies & Other Direct Costs

Bulk Data Clean-Up Instructions

To enable a thorough and efficient conversion of existing GUS projects into the PGM module in Oracle Financials Cloud, the project team has worked closely with our GUS support and Program Management Office (PMO) teams to develop a Google Sheets template for streamlining data review, categorization, for field clean-up, extraction, and conversion purposes. We need GUS departments to adopt a standardized use of <u>some</u> existing data fields and populate new fields with required information.

Reference the PGM - GUS Data Conversion Template Instructions for an overview of the template and the steps to complete the data fields.

*GUS projects to be extracted for clean-up consist of: all projects with a 22-23 fiscal year; all projects associated with an active PeopleSoft fund in the C&G fund range; and any other projects (excluding those with statuses of: closed, archived, expired) without a fiscal year with an award end date that hasn't lapsed.

Ongoing Data Maintenance

Although bulk data clean-up will allow for mass updates at a particular point in time, it will be important that new projects created contain the same information required for PGM conversion activities. To enable ongoing maintenance of new projects, a new data entry tab has been created in GUS within each project set-up screen. See below for navigation. It is encouraged that departments populate this tab with the required information during each new project set-up from now until go-live.

Navigate to Project -> Projects -> Select Project -> Click 'PGM Conversion' tab

Edit Project

Award Information | Budget Information | Misc | Add'tl Notes | Logs | PGM Conversion