

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

**Grand Unified System (GUS) Data Conversion Template** 

Updated: April 10, 2023

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#### **TEMPLATE OVERVIEW**

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

#### **Existing Project Data in GUS**

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



### New Project Fields

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

#### 22-23 447860 ICB ICB Chmelka, Giesbrecht, Truema `22-23 269800 447860 Incomplete ICB 108409 '22-23 447850 07427 Saleh, Yeung IC8411 22-23 447850 05397 Petzold TAB21 21-22 447850 19933 TAB22 22-23 447850 19933 Incomplete ICB ICB Trueman 21-22 447000

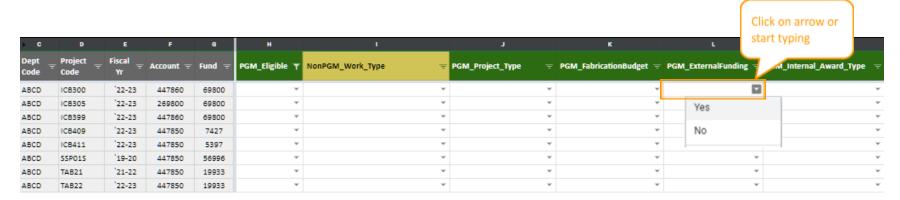
New fields for data entry

## 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 <u>GUS Project Conversion Instructions for Wave 3+4 Departments</u> .	
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 <u>GUS</u> <u>Project Conversion Instructions for Wave 3+4 Departments</u> .	
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:  • 18200 – 18999 State of CA C&Gs  • 20600– 20999 Local & Other Government C&Gs  • 21000– 33999 Federal C&Gs  • 57000– 59999 Private C&Gs  • 77150– 77999 ARRA C&Gs (no active awards here)  • 78000– 79999 Private Contracts & Micro Awards	
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, BUDGetc.). 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.	

#### **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.



#### **Auto-Populate Fields**

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

- The PGM\_DeptManagerID (column P) will automatically populate the employee ID per entry in the PGM\_DeptManagerName field.
- The PGM\_LeadPIID (column R) will automatically populate the employee ID per entry in the PGM\_LeadPI field.

#### Auto-populate fields



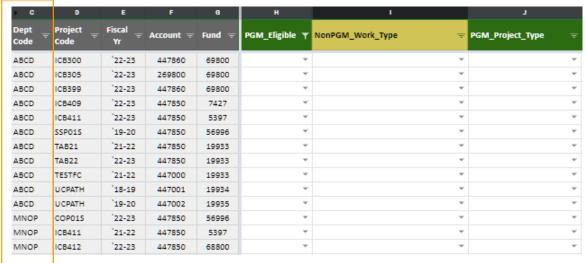
• Status (column S) - Note, this is not a Project data field. Rather, it is a reference column added for data validation. The status of whether the required data fields are "incomplete" or "complete" will automatically populate based on the entries.

#### **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



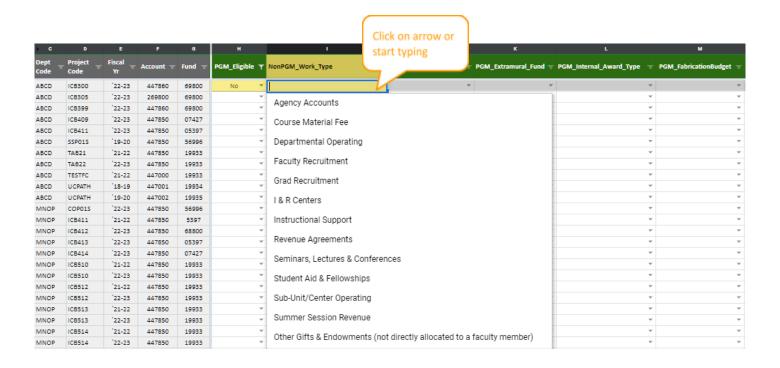
### [Step 1] PGM Eligibility

Referencing the <u>GUS Project Conversion Instructions for Wave 2 Departments</u> document, 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.

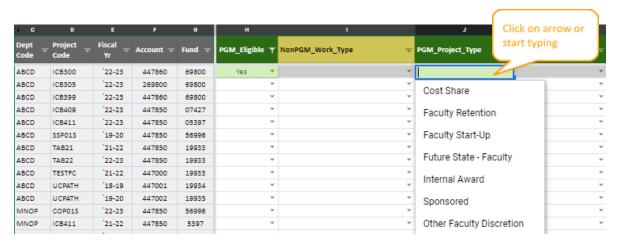
#### [Step 1.1] NonPGM\_Work\_Type

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.



#### [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."



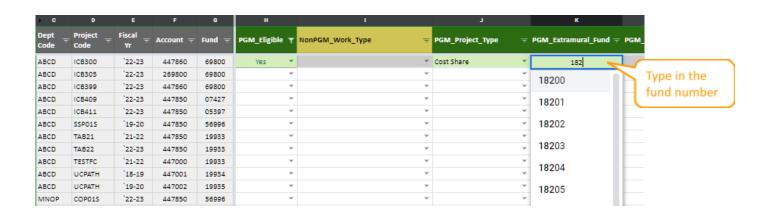
#### [Step 2.1] Project Type = "Cost Share"

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:

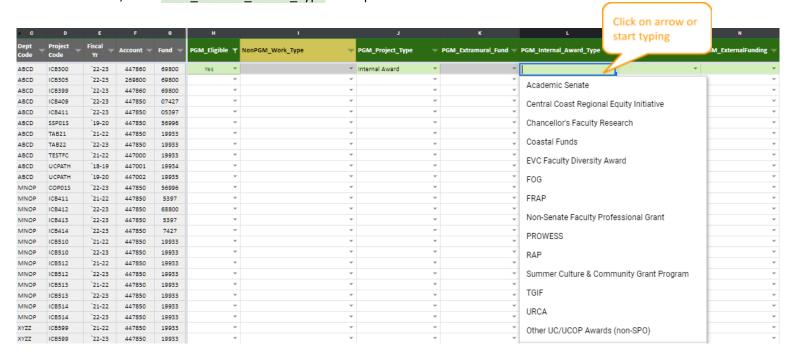
- 18200 18999 State of CA C&Gs
- 20600 20999 Local & Other Government C&Gs
- 21000 33999 Federal C&Gs
- 57000 59998 Private C&Gs
- 77150 77999 ARRA C&Gs (no active awards here)
- 78000 79998 Private Contracts & Micro Awards

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



#### [Step 2.2] Project Type = "Internal Award"

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

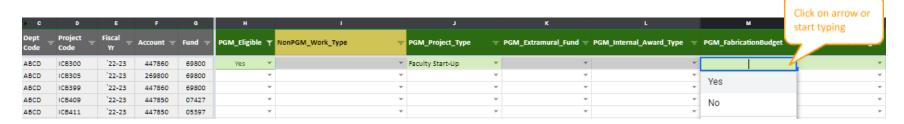


#### [Step 2.3] All Other Project Types

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

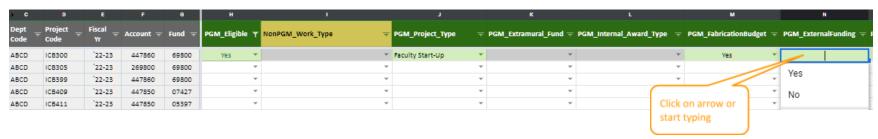
#### [Step 3] PGM FabricationBudget

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



#### [Step 4] PGM\_ExternalFunding

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



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.



*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.



### [Step 7] Status

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

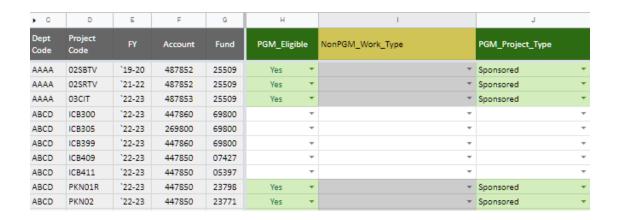
- If "incomplete," make sure there are entries in the yellow / green fields and blanks in the gray fields.
- If "complete," go to the next Project Code and start again from [Step 1].



#### 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.



#### 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:

# There was a problem

The PGM Extramural Fund is a 5-digit code within the following ranges: 18200-18999, 20600-33999, 57000-59999, and 77150-79999.

OK

×

#### 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 <u>PGM Conversion Leads</u> (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 <u>PGM Conversion Leads</u> (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 (fmm-pgm-conv-leads@farm.ucsb.edu) for assistance.

For other questions or support, please send an email to the <u>PGM Conversion Leads</u> (fmm-pgm-conv-leads@farm.ucsb.edu) for assistance.