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Implementing Sub Project Numbers

September 2014

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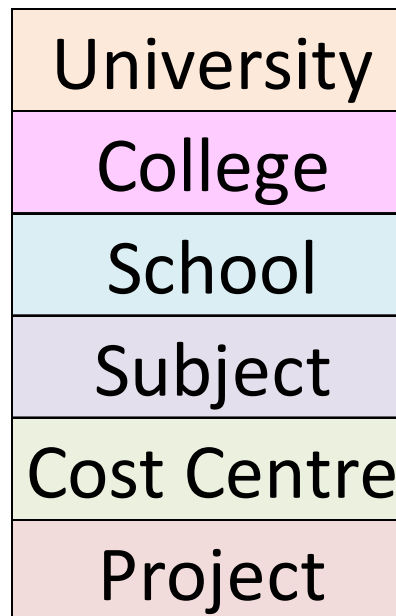




- Current Financial Coding Structure
- Rationale for change
- Sub project numbers
- Implications and examples
- Timescales
- Feedback



Current Financial Coding structure



- Financial transactions are posted at the lowest level in the structure i.e. Project
- Reporting can then be complete at each of the levels in the structure



Current limitations

- Project numbers are 5 numeric characters e.g. 41744. We are running out of available project numbers within the existing 5 character number ranges.
- A project can only sit under one cost centre. This therefore limits the University's ability to report where we have a joint project across multiple cost centres. This scenario is common in research projects.



No ability to group projects across cost centres

Project Principal Investigator

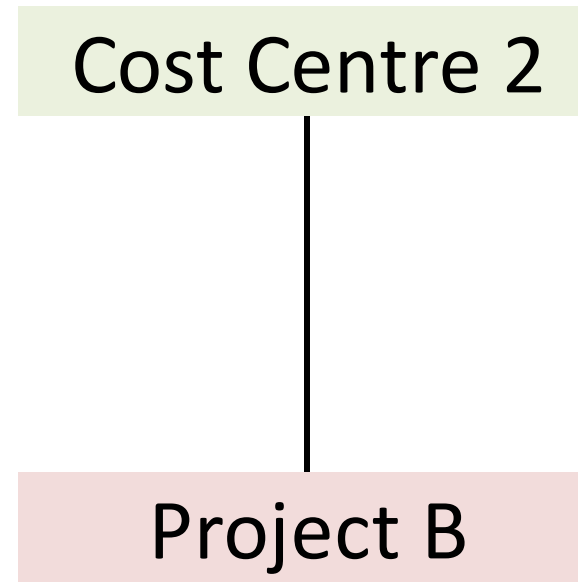
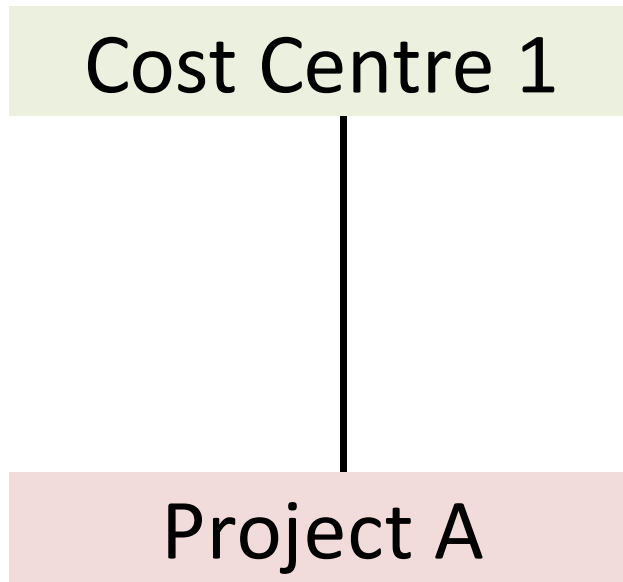
Project Co-Investigator

Cost Centre 1

Cost Centre 2

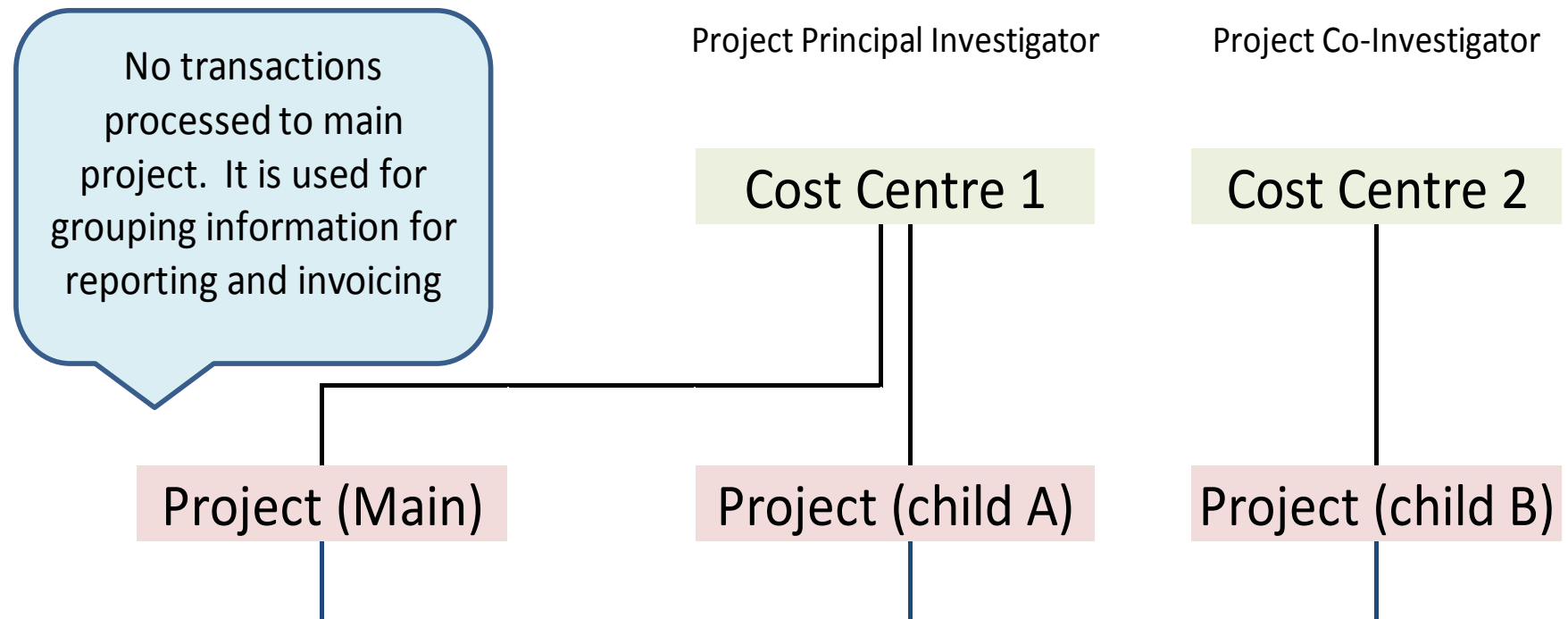
Project A

Project B



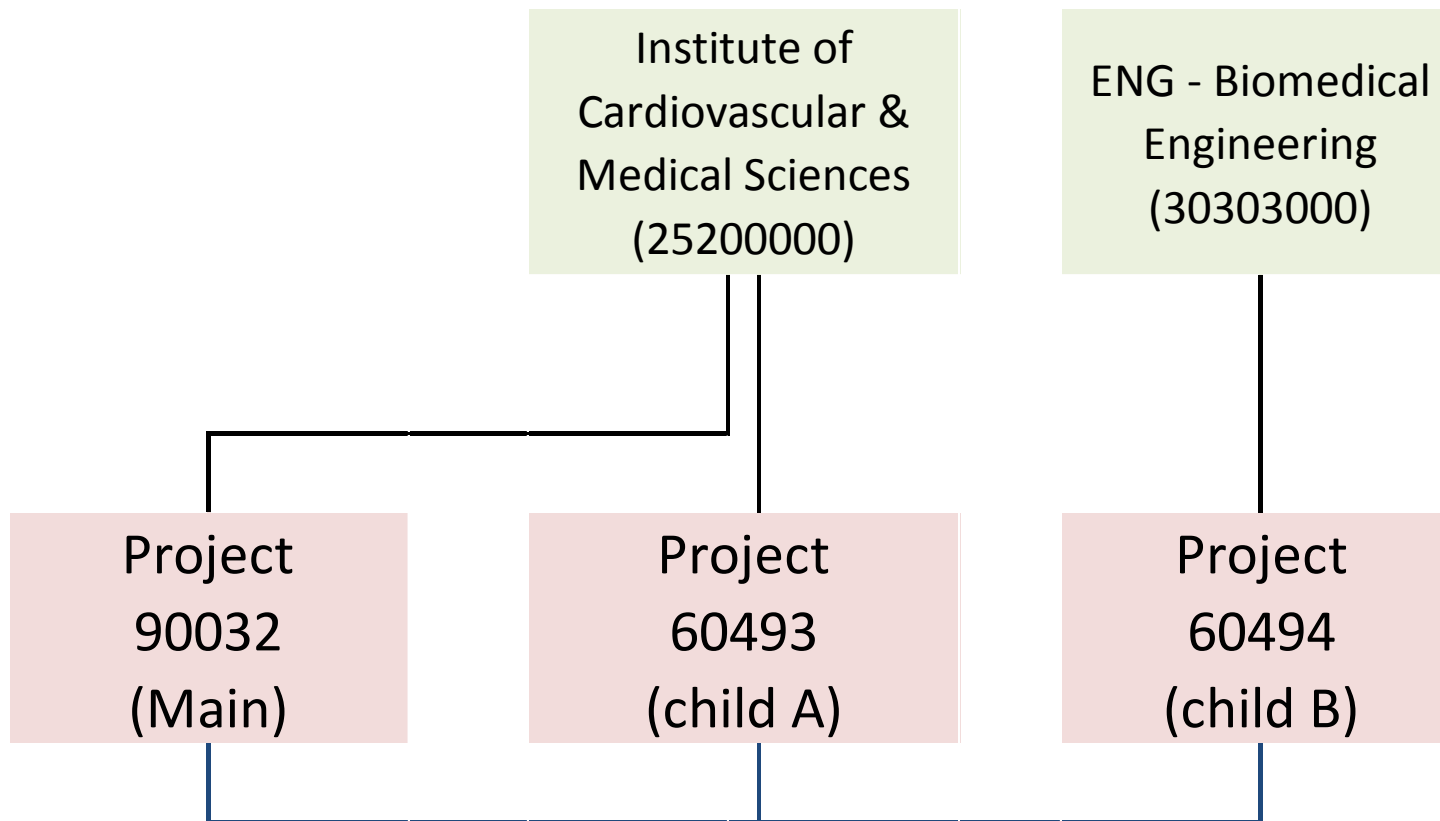


- To overcome this limitation additional functionality has been developed by classifying some projects as ‘parent’ projects and others as ‘child’ projects. The parent project is linked with the children.
- However this is an adaptation of system functionality rather than standard system functionality.





example





Rationale for change

Problem – lack of capacity in existing 5 character numbers

Solution – increase project number from 5 numeric characters to 6

- A number one will be added in front of the existing project numbers (excluding child projects) to increase them to 6 digits e.g. 41744 will become 141744



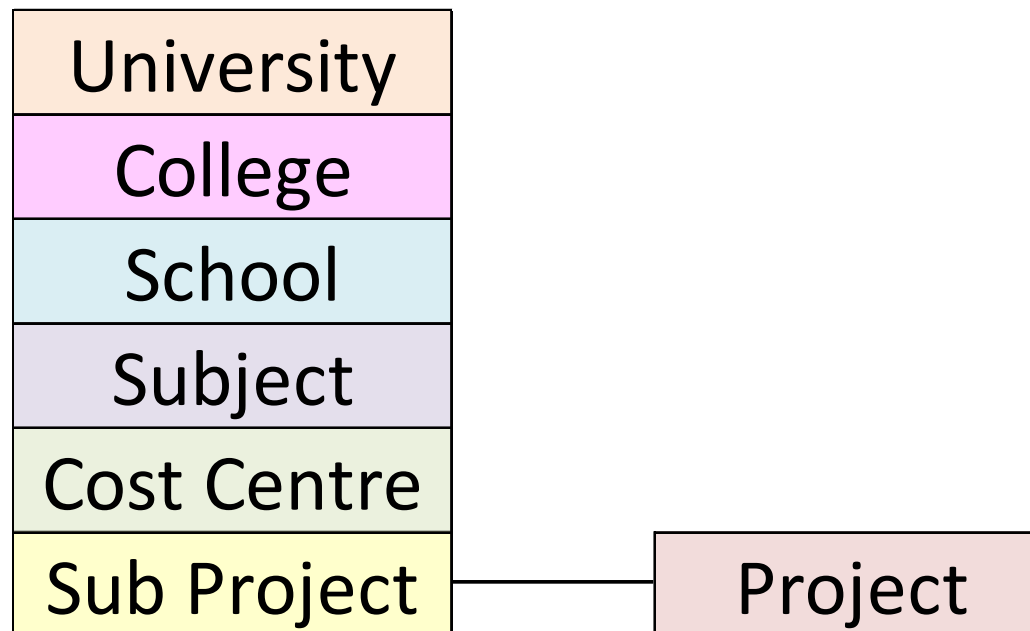
Rationale for change

Problem –the current in-house solution of classifying projects as a parent or child does not allow us to utilise new system functionality. This has been brought to the fore with the impending implementation of the new Agresso Research Costing and Pricing module that will replace the existing research system

Solution – implement standard system functionality ‘sub project’ numbers

New Financial Coding Structure

Sub project is added as the lowest level in the structure and project sits to the side to allow multiple sub projects to be grouped regardless of cost centre





Implications - Research

- Parent projects will become Projects
i.e. existing parent project number is prefixed with a 1
- Child projects will become Sub Projects
i.e. existing child project number is prefixed with a 1 and
suffixed with a -01



Implications

- All transactional processing at sub project level i.e. data entry will require the sub project number to be keyed rather than project number
- System interfaces require to be updated to use sub project number rather than project
- Local databases, spreadsheets forms require to be updated to use sub project number rather than project
- All existing and historic transactions in the system will be updated to include sub project



Summary of the numbering change

- All project numbers (excluding child projects) will be extended to 6 characters by prefixing existing numbers with a 1
- A sub project number will be created for all existing project numbers (excluding parent projects) by adding the prefix 1 to the existing number and -01 as a suffix
- After sub project numbers are implemented new research projects will start '17' (e.g. 170251) and the sub project will be the project number with the suffix -01 for the first sub project and -02 for the second etc (e.g. 170251-01, 170251-02)

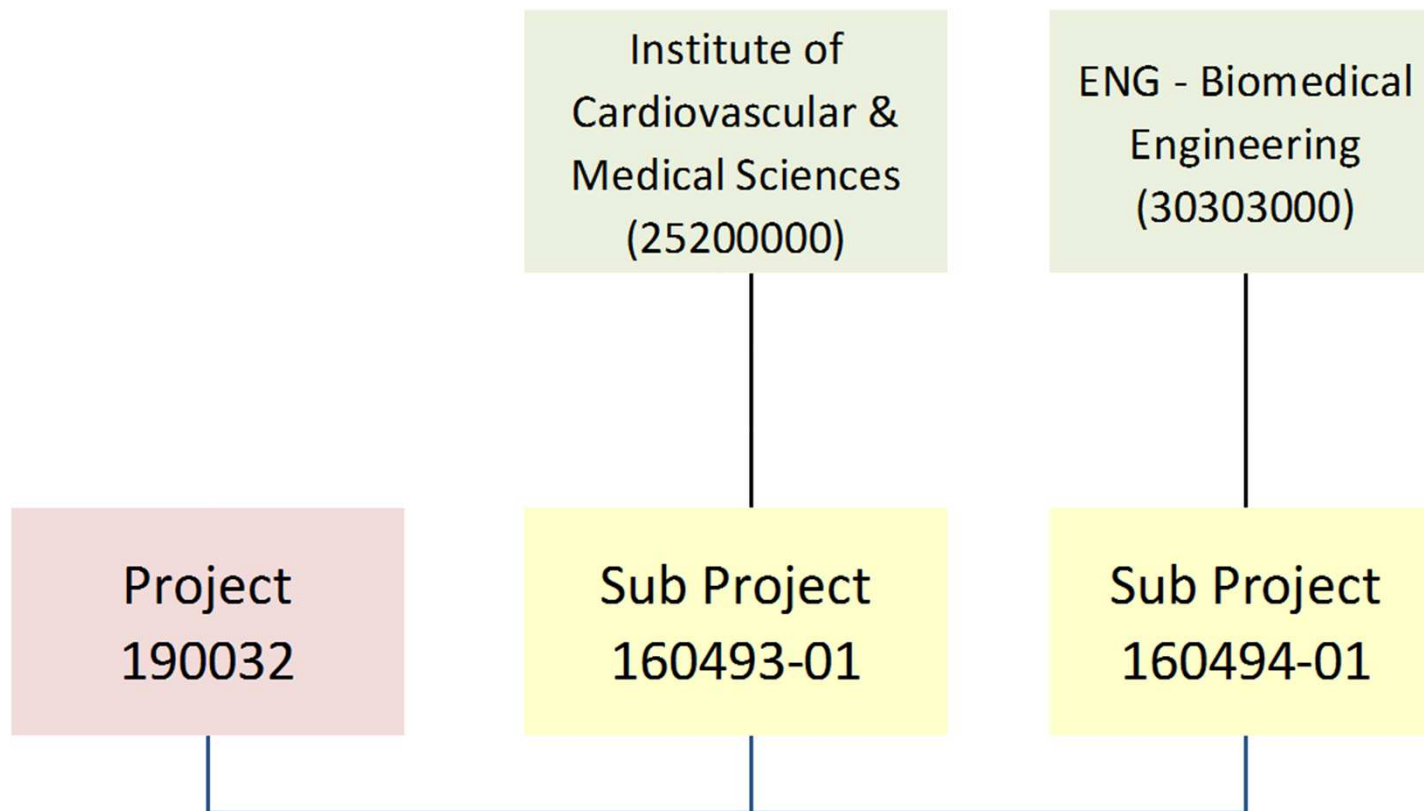


Summary of Numbering Change

- After the implementation of sub project numbers new non research projects will start '2' and the sub project will be the project number with the suffix -01 for the first sub project and -02 for the second etc
- After the implementation of Agresso Research Costing and Pricing (April 2015) new research projects and sub projects created from this module will start '3'

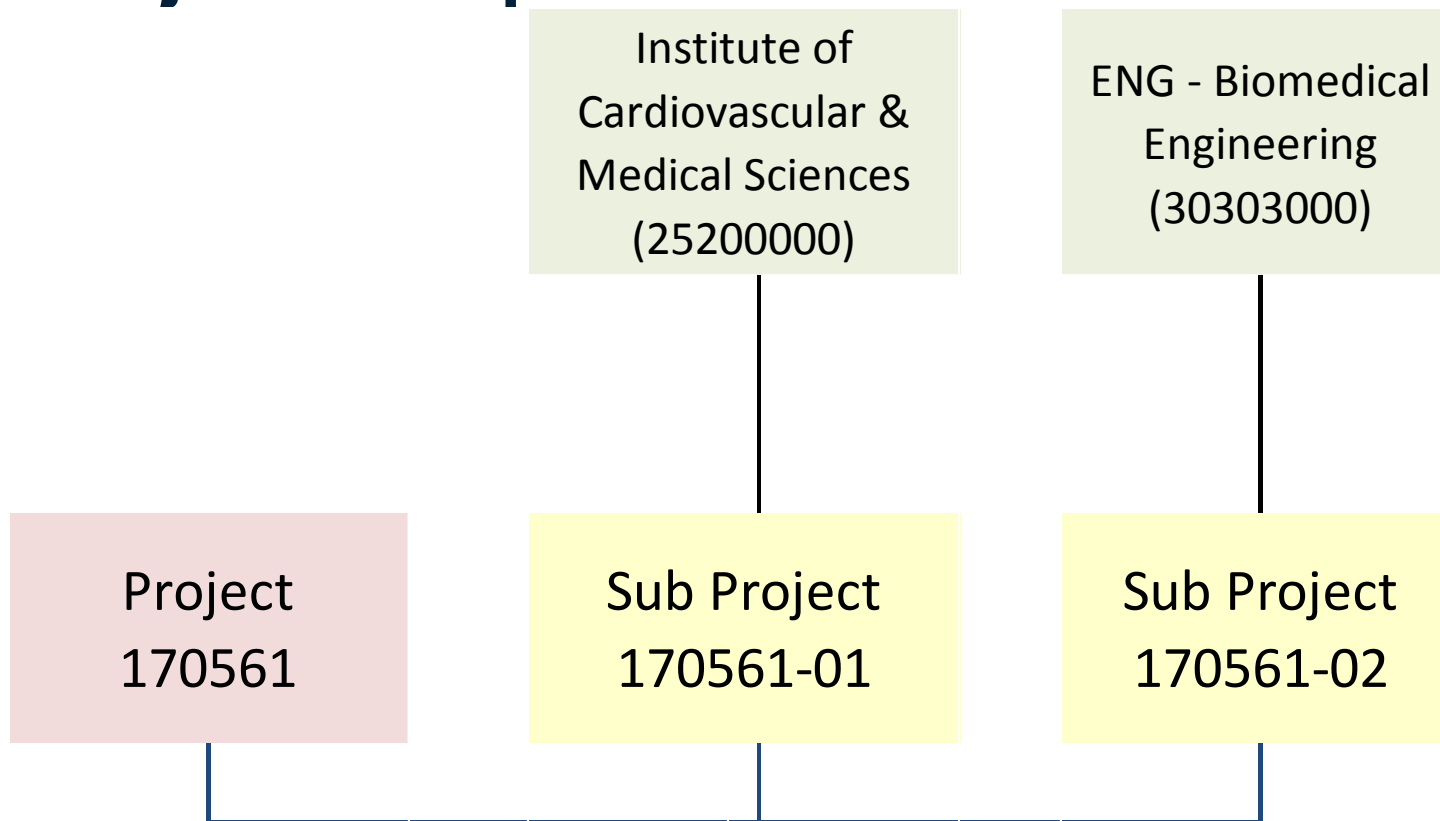


Converted research number example





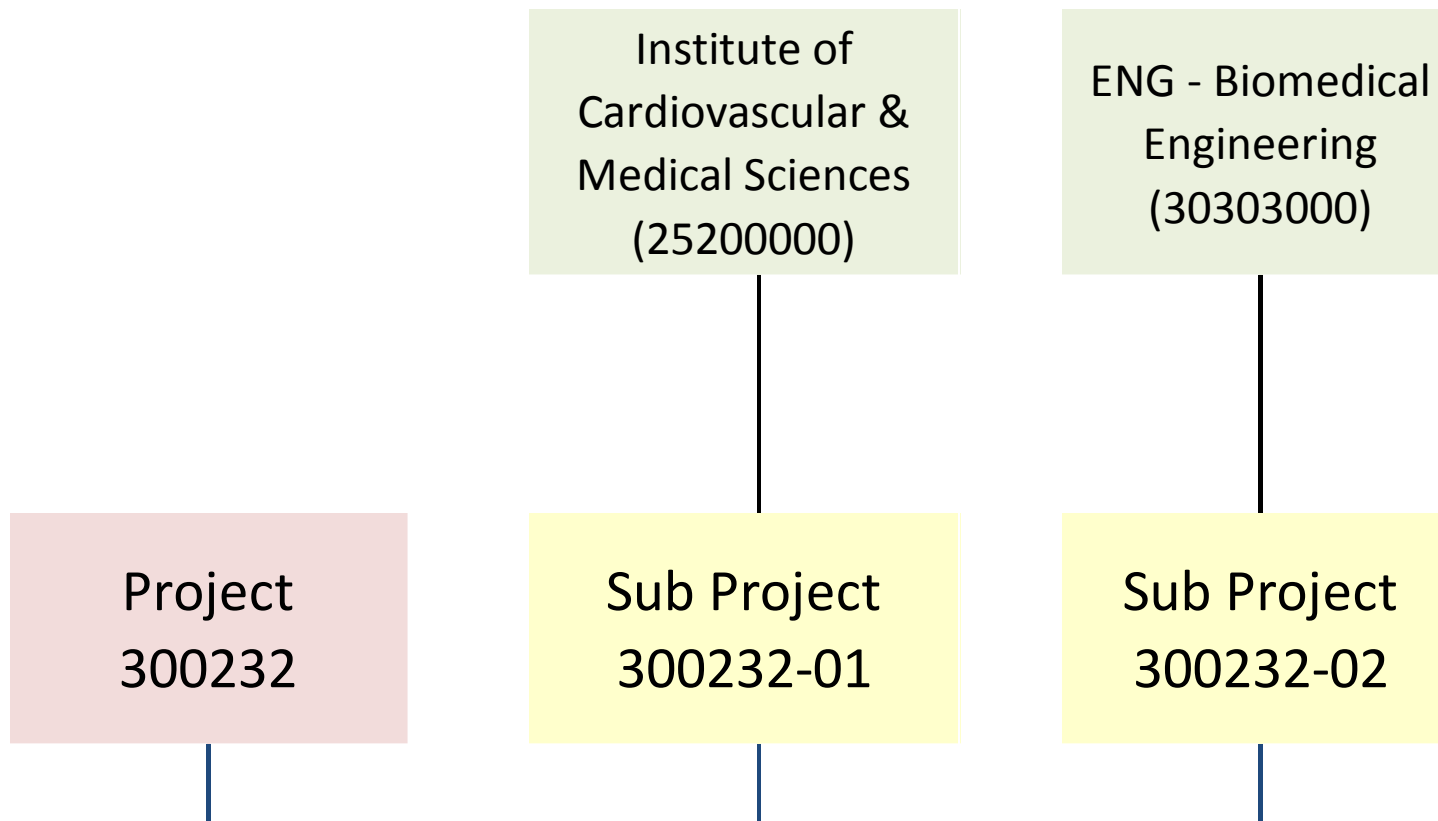
New research numbers after implementation of Sub Project example





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New research numbers after implementation of Agresso Research Costing and Pricing Module





Converted non research numbers example

existing

Finance Systems
(90206000)

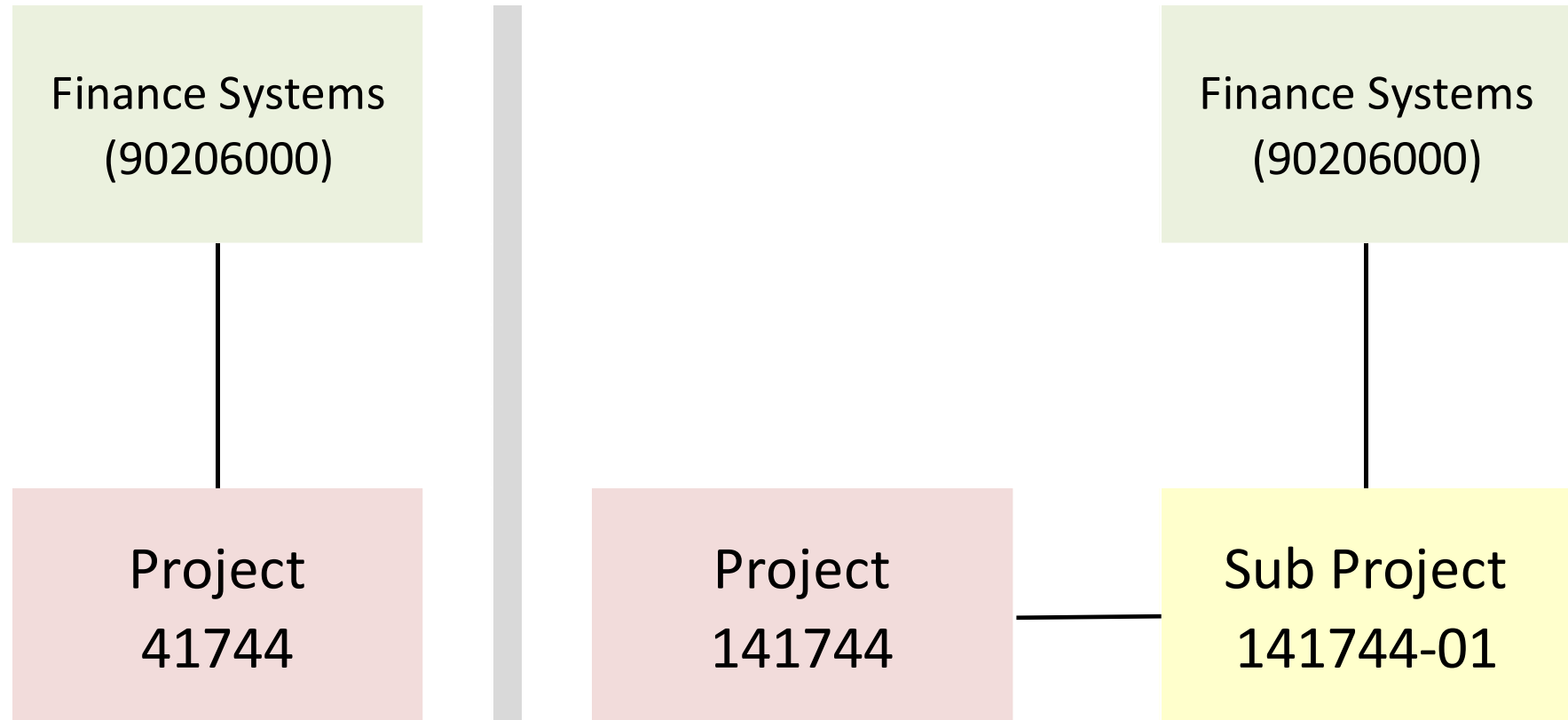
Project
41744

converted

Finance Systems
(90206000)

Project
141744

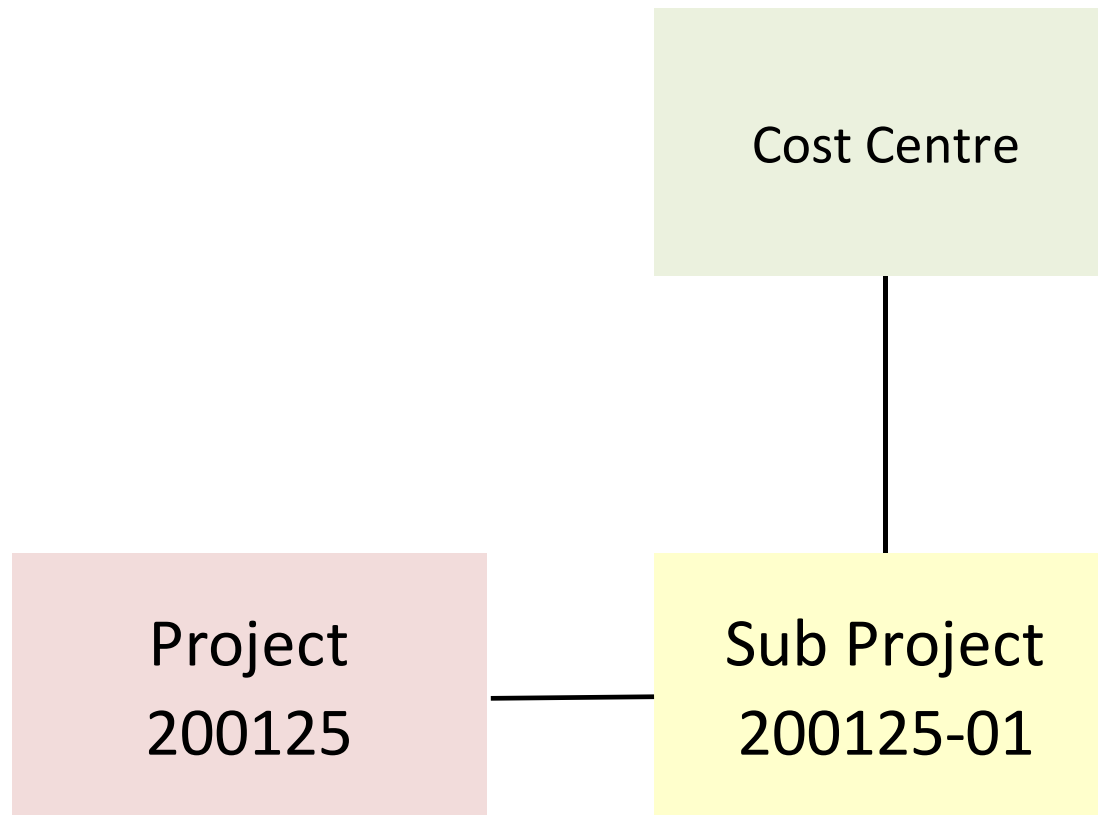
Sub Project
141744-01





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New non research numbers after Sub Project Implementation example





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Timescales

Planned implementation date for Sub Projects

24th Nov 2014

A link to the slides and details of system interfaces being updated will be issued.



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Feedback and questions