Implementing Sub Project Numbers

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Gillian Richardson
Carol Goldthorp
Agenda

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

| University | College | School | Subject | Cost Centre | Project |

- 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

Cost Centre 1

Project A

Cost Centre 2

Project B

Project Co-Investigator
• 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.
No transactions processed to main project. It is used for grouping information for reporting and invoicing.
example

Institute of Cardiovascular & Medical Sciences (25200000)

ENG - Biomedical Engineering (30303000)

Project 90032 (Main)

Project 60493 (child A)

Project 60494 (child B)
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.
Sub Project numbering

Sub Project numbers will consist of the project number and an added suffix to represent each sub section of the project.

A project number is suffixed with a hyphen and a 2 digit numeric

e.g. project 141744

sub project 141744-01
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

Project 190032

Sub Project 160493-01

Institute of Cardiovascular & Medical Sciences (25200000)

ENG - Biomedical Engineering (30303000)

Sub Project 160494-01
New research numbers after implementation of Sub Project example

Project 170561

Sub Project 170561-01

Institute of Cardiovascular & Medical Sciences (25200000)

ENG - Biomedical Engineering (30303000)

Sub Project 170561-02
New research numbers after implementation of Agresso Research Costing and Pricing Module

- **Project 300232**
  - **Sub Project 300232-01**
    - Institute of Cardiovascular & Medical Sciences (25200000)
  - **Sub Project 300232-02**
    - ENG - Biomedical Engineering (30303000)
Converted non research numbers example

existing

Finance Systems (90206000)

Project 41744

converted

Finance Systems (90206000)

Project 141744

Sub Project 141744-01
New non research numbers after Sub Project Implementation example

Project 200125

Sub Project 200125-01

Cost Centre
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.
Feedback and questions