

SPAC POST QUANTUM AWARD AND PROJECT NUMBERING

The conversion of the data from PeopleSoft to Quantum, posed a new numbering system for not only projects but at times awards. In PeopleSoft SPAC would perform all financial functions at the project level; in Quantum we perform all functions at the award level. Therefore, this requires SPAC to change our numbering logic in Quantum for both contract and projects.

Contract Numbers:

In the new system, award numbers are sequential and cannot be modified to accommodate our previous procedure of using a suffix for continuations. We are only able to modify project numbers.

With Quantum, the only time we will change the award Number is:

1. Change in a Purchase Order (PO) Number
 - a. Single - (VA)
 - b. Multiple PO's on one award (BCPS)
2. Change in Sponsor Contract Number (not adding the year at the end, the core # must change)
3. Change in Letter of Credit (LOC) ID
4. Change in Sponsor funding source (like LOC ID change – but this is a new funding window)

We will refer to these situations as the Sponsors funding source.

In Quantum, the only way that we can achieve that association is through an award edit, referring the new award back to the previous award or associated award. This will require SPAC to advise SPA and the departments of the related awards when sending the setup email.

The award numbers that were active when UMB went live in Quantum transferred over with their original award number. This number will remain until one of the changes above occurs. New awards set up in Quantum are a sequential numbering logic; next one available becomes the award number.

Project Numbers for transferred project numbers:

The project numbers that were not closed in PeopleSoft transferred over to Quantum. However, the project numbering logic in Quantum is that a project number is an extension of the award number with the last number being the current funding year for this awards funding period.

Utilizing that logic for the old Award Numbers: Award # 990873D

Yr 1 PID: 10019983 (transferred from Peoplesoft)

Yr 2 PID: 10021940 (transferred from Peoplesoft)

Yr 3 PID: 10021941 (transferred from Peoplesoft)

If we are funded for year 4 and 5 of the award utilizing the new logic:

Yr 4 PID: 990873D4 (award number – year 4 funded)

Yr 5 PID: 990873D5 (award number – year 5 funded)

As you can see the new project ID's assumed the award number followed by the funding year.

Continuations:

If we receive continuation funds from the award above, but the contract number, PO, LOC or funding source changes it will receive a new award number which will be referred to 990873D5

Project Numbers for New Awards:

As stated, the project numbers on the new awards are the new 6-digit number plus the year of funding. Therefore, a five-year award would have the following numbering on award number 2003746:

Yr 1 PID: 20037461

Yr 2 PID: 20037462

Yr 3 PID: 20037463

Yr 4 PID: 20037464

Yr 5 PID: 20037465

Project Numbers for Child Projects

Child projects follow the same naming convention as the examples above using C as a designator that it is a child. For example, using the same project number and it has a child project on year 1

Yr 1 PID: 20037461 (1st year funding)

Yr 1 PID: 20037461C1 (1st year funding, 1st child)

If there were 2 child projects in year one, then the numbering scheme would be

Yr 1 PID: 20037461 (1st year parent funding)

Yr 1 PID: 20037461C1 (1st year funding, 1st child)

Yr 1 PID: 20037461C2 (1st year funding, 2^{cd} child)

If we had year two child projects

Yr 2 PID: 20037462 (2^{cd} year parent funding)

Yr 2 PID: 20037462C1 (2^{cd} year funding, 1st child)

Yr 2 PID: 20037462C2 (2^{cd} year funding, 2^{cd} child)

This will continue for future years

Concerns of tracking Carryover

1. Awards have two formats
 - a. Automatic Carryover
 - b. Not Automatic Carryover
2. If it is automatic carryover, the award should only have one project for the period of the award – Note, there may be children, but this should not affect the 1 project period for the parent
3. If an award does not automatic carryover, it should have multiple projects, one for each year of budget. Child projects were described above for this type or project
4. For both formats, SPAC is **implementing immediate closure***
 - a. Once a final bill amount for a budget year equals the cumulative expense total in Quantum it will be presented to the Manager for signature
 - b. The manager should be notified that this is a final invoice by the Financial Analyst
 - c. The manager will review the supporting documentation and financial information from Quantum
 - i. If all expenses are posted by the department with no small balance batch entries by SPAC to produce the final bill, the manager will close the project in Quantum
 - ii. If there were small balance batch entries by SPAC, that project will have to remain open until the department posts the corresponding entries
 - d. A project will only be opened if there is approval from a sponsor to move the budget from one budget year to the next
 - i. The unused budget will remain in the closing project until carryover is approved
 - ii. If carryover is received later, ask your manager to open the project
 - iii. The project will be reopened, budget moved to a future year
 - iv. Analyst must notify the manager that the budget move is complete
 - v. Project will be closed again after budget amendment

* Close-Out

(Script) Change the status of the project to “Closed” (9/6/2019)

1. Click over to Navigator > **Projects** > **Project Financial Management**.
2. Search for the project(s) created and click on the **Project Status** hyperlink
3. In the **Change Project Status** window, change the status to **Closed**. Then click **Save and Close**

(Script) Change the status of a contract to “Closed”

1. Navigate to **Contract Management** > **Contracts**
2. Search for the relevant **Contract Number**
3. Click the **Number** hyperlink in the Search Results
4. Within the Contract, with the **Overview** tab selected, select **Actions** > **Close** and select the appropriate **Reason**
5. Click **Save and Close**, then click **Save and Close** again to exit the Contract