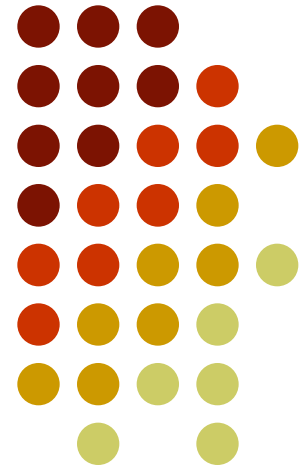


Converting Legacy Data

Case study: University of Maryland
– Baltimore



Introduction



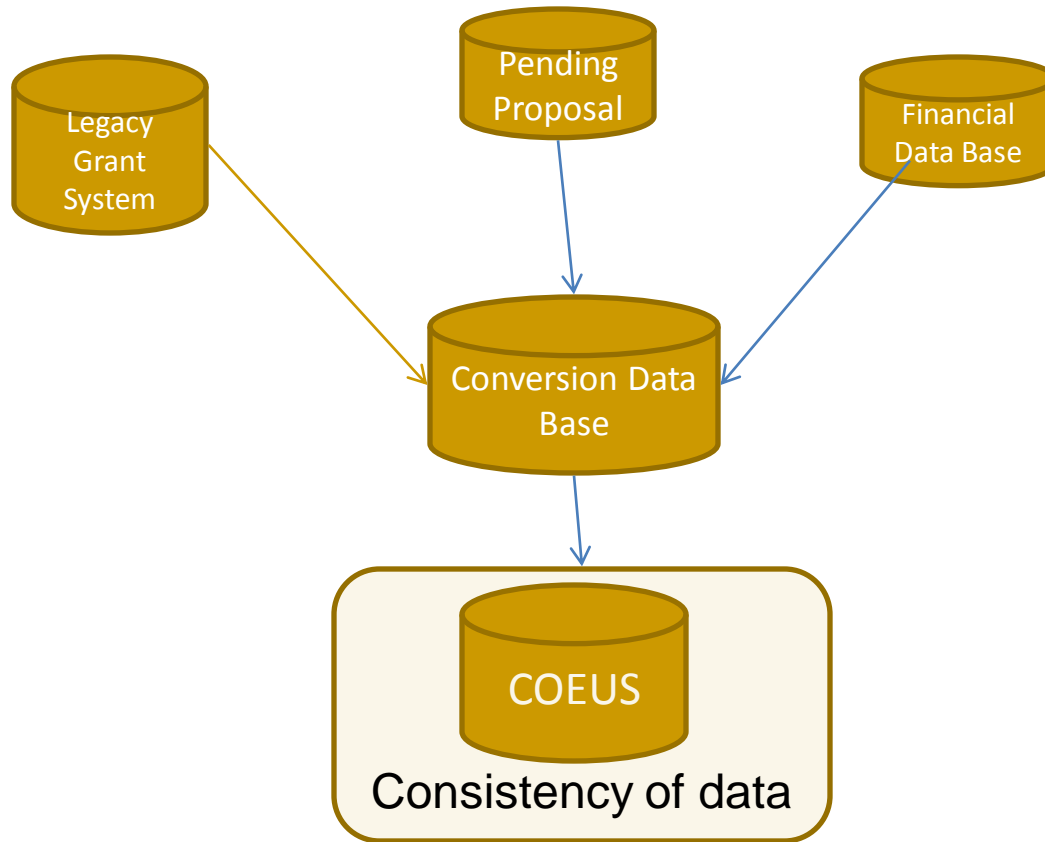
- Doug Bowser
 - IT Application Manager
 - Center for Information Technology Services
 - 26 years at UMB supporting many different systems

Overview



- Review the experiences that UMB encountered during their recent conversion effort. We will review which tables were loaded, which Oracle sequences require updating, loading of Medusa tables and other helpful information.

Where did we start





Data structuring

- UMB converted data into the Institute Proposal, Award and Budget modules
- Converted the complete current funding block for grants active as of July 1, 2007
- All types of grants where converted
- MIT delivered field definitions were used where possible

Data structuring



- Decided to use Other Data Tab to create custom data fields
- Used a conversion environment that was refreshed from production periodically
- Planned for multiple mock conversion runs



Method of Loading Data

- Delimited files were created from the conversion data base
- Files were formatted, reviewed for visual errors before loading
- UMB created Java programs to load the data
- Output logs were reviewed for errors encountered while loading the grant data

Loading for Institute Proposal Module



- Tables Loaded
 - OSP\$PROPOSAL
 - OSP\$PROPOSAL_IDC_RATE
 - OSP\$PROPOSAL_INVESTIGATORS
 - OPS\$PROPOSAL_UNITS
 - OSP\$PROPOSAL_CUSTOM_DATA
 - OSP\$PROPOSAL_SPECIAL_REVIEW
- No Medusa entry was required since no proposal development entry existed

Institute Proposal Tips



- Use Oracle sequence
SEQ_INST_PROPOSAL_NUMBER to auto-increment the proposal number
- Create an IP record for pending proposals and awarded proposal
- Limit of 9,999 proposals per month
- Understand 2 character Y/N fields
- Decide where to get the person COEUS_ID value
- Use a unique id for the updated user field



Loading for Award Module

- Tables Loaded
 - OSP\$AWARD
 - OSP\$AWARD_HEADER
 - OSP\$AWARD_HIERARCHY
 - OSP\$AWARD_IDC_RATE
 - OSP\$AWARD_INVESTIGATOR
 - OSP\$AWARD_UNITS
 - OSP\$AWARD_AMOUNT_INFO
 - OSP\$AWARD_CUSTOM_DATA
 - OSP\$AWARD_FUNDING_PROPOSALS **

** Indicates Medusa table

Loading for Awards Module cont.



- Tables Loaded
 - OSP\$AWARD_COMMENTS
 - OSP\$AWARD_DOCUMENT_TERMS
 - OSP\$AWARD_EQUIPMENT_TERMS
 - OSP\$AWARD_INVENTION_TERMS
 - OSP\$AWARD_PRIOR_APPROVAL_TERMS
 - OSP\$AWARD_PROPERTY_TERMS
 - OSP\$AWARD_PUBLICATION_TERMS
 - OSP\$AWARD_REPORT_TERMS
 - OSP\$AWARD_RIGHTS_IN_DATA_TERMS
 - OSP\$AWARD_TRAVEL_TERMS
 - OSP\$AWARD_CONTACT
 - OSP\$AWARD_SUBCONTRACT_TERMS

- Setting up of Templates can assist in populating data into these tables. Makes the conversion much easier.

Award Tips



- Use Oracle sequence SEQ_AWARD_NUMBER to auto-increment the award number
- Do not forget to go back and fund IP record
- Must update the Medusa table with IP and Award info (for all sequences)
- Understand 2 character Y/N fields
- Decide where to get the person COEUS_ID value
- Use a unique id for the updated user value
- Understand your award hierarchy structure

Award Tips – award structure



- UMB structure:
- xxxxxx-001 (award/grandparent level)
 - xxxxxx-002 (project/parent level)
 - xxxxxx-010 (child level)
 - xxxxxx-021 (child level)
 - xxxxxx-003 (project/parent level)
 - xxxxxx-004 (project/parent level)
 - xxxxxx-005 (project/parent level)
 - xxxxxx-014 (child level)
 - xxxxxx-021 (child level)
 - xxxxxx-006 (project/parent level)

Award Tips – HIERARCHY structure



Award #	MIT Award #	Parent #
● xxxxxx-001	xxxxxx-001	000000-000
● xxxxxx-002	xxxxxx-002	xxxxxx-001
● xxxxxx-010	xxxxxx-010	xxxxxx-002
● xxxxxx-021	xxxxxx-021	xxxxxx-002
● xxxxxx-003	xxxxxx-003	xxxxxx-001
● xxxxxx-004	xxxxxx-004	xxxxxx-001
● xxxxxx-005	xxxxxx-005	xxxxxx-001
● xxxxxx-014	xxxxxx-014	xxxxxx-005
● xxxxxx-021	xxxxxx-021	xxxxxx-005
● xxxxxx-006	xxxxxx-006	xxxxxx-001



Loading for Budget Module

- Tables Loaded
 - OSP\$AWARD_BUDGET_INFO
 - OSP\$AWARD_BUDGET_DETAIL
 - OSP\$AWARD_AMT_FNA_DISTRIBUTION

Budget Module Tips



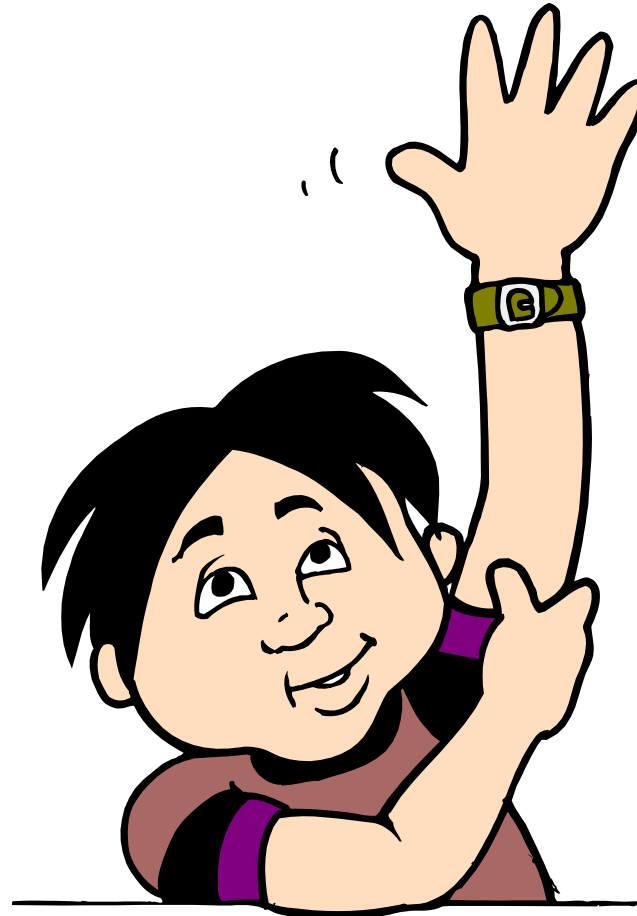
- Be careful of budget dates
- Be sure to load the F&A table in the correct order
- Load converted budgets with a status of “Posted”



Conversion Stats

- Converted 3844 funding proposals
- Converted 2010 pending proposals
- Converted 6874 award records
- Shut down COEUS for 3 days
 - 2 days to load data
 - 1 day to review data

Questions?



Contact Information

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