Project Purpose

- Enhanced Compliance Processes
  - Accuracy and Timeliness of Reporting
  - Cash Management
  - Letter of Credit Management
  - Salary Cost Transfers

- Utilize Licensed PeopleSoft Modules

- Reduce Redundant Data Entry and Manual Processes

- Increase Operational Reporting Capability and Provide for Reporting of Performance Metrics

- Share Information with Key University Systems and Constituencies

- Better Manage Billing and Accounts Receivable

- Reduce Need for Supplemental Systems
Changes Resulting from Project

- Salary Detail Cost Transfer – S Stuart
- Milestone Notification – T Franklin
- Negotiations Bolt On – Demos are ongoing
- Cost Share – L Price
Cost Share

• End-user focus groups analyzed several cost sharing alternatives
  • No feasible approach that was cost effective.
• To limit customizations and future upgrade issues, the decision was made to use PeopleSoft’s delivered cost sharing functionality.
• The PeopleSoft grants system does not allow for cost sharing using the Project field.
  • If you are going to cost share you cannot use the Project field as a source of funding. (For example: Endowed chairs, optional projects and construction projects.)
  • Keep this in mind when preparing the FY11 budget.
Grants Process

1. Profile Set-Up & Maintenance
2. Proposal Creation & Tracking
3. Award Set-Up & Negotiation
4. Monitor & Manage Award
5. Request Reimbursement
6. Receive Payment
7. Close-Out Award
8. Reporting
Project Scope

• Implement the Grants Management Suite in Version 9.0 of PeopleSoft
  – Grants Management
  – Projects
  – Contracts
  – Billing
  – Accounts Receivable

• Adapt Existing PS Modules as needed
  – Commitment Control
  – General Ledger
Team Members

• Office of Research Administration
  – Mary Cotter-Lalli
  – Kasie Nichols
  – Lisa Asch

• Grants & Contracts
  – Tamie Franklin
  – Janetta Tesch
  – Laurie Price
  – Frank Schwartzott

• Financial Services
  – Scott Stuart
  – Sammy Mayfield

• Information Technology
  – Rao Velvadapu
  – Matt Malone
  – Gary Beckmann
## Project Scorecard

### Project Data as of 11/02/09

#### Development Summary: GREEN

<table>
<thead>
<tr>
<th>ALL</th>
<th>Cash</th>
<th>Pre-Award</th>
<th>Post Award</th>
<th>Data Conversion</th>
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<td>0</td>
<td>1</td>
<td>1</td>
<td>0</td>
</tr>
</tbody>
</table>

- Entered: 10
- Pre-Development: 6
- Development: 7
- Ready for QA: 9
- QA: 2
- Technical Review: 3
- Ready for Prod: 0
- Production: 44

**Totals:** 81, 18, 20, 43, 7

**Complete (In Production):** 17, 8

**Functional:**
- Complete: 1426
- In Progress: 980
- Held: 1650
- Retest: 220

**Unit Testing:**
- Complete: 2648
- In Progress: 942
- Held: 2270
- Retest: 365

- Percent Complete: 54%
- 98%: Red
- 70%: Yellow
- 58%: Green

#### Business Process Summary: YELLOW

- Underway: 14
- Completed: 1

- Initial Draft: 2
- Final Draft: 1
- Review: 1
- First Review: 1
- First Draft: 1

#### System Testing Summary: GREEN

- Underway: 45
- In Progress: 9
- Priority 1: 61
- Priority 2: 821

- Test Script Creation: Completed
- Data Cleanup: Scheduled

- Data Conversion: Completed

- TODO: 132

- Not Started: 132

- Data Collection: completed

- Training Materials: Scheduled

#### Training Summary: GREEN

- Introductory Sessions: Completed
- Desk References: Available

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**Workstream Status:**

- **Green:** Current status of this area is 90% to over 100% on target with established milestones.
- **Yellow:** Current status of this area is 75% to over 89% on target with established milestones.
- **Red:** Current status of this area is under 75% on target with established milestones.

**NOTE:** Currently 24 test scripts ahead of schedule. Team will monitor time required for reviews to ensure these do not become a bottleneck.

**NOTE:** statistics are from last week. ORA is currently 57% complete with Priority 2 clean-up tasks.
www.ouhsc.edu/grants
E-Mail Dorothy Polen to get on the distribution list.

dorothy-polen@ouhsc.edu
Questions?