Progress on the Grants Project

What is happening in the Grants Project?

We have concluded our Design phase, and are progressing through the Development phase. We will start testing next month. During the Design Phase, we looked at financial processes across the institution, primarily in ORA, GCA and Finance and determined whether to use the PeopleSoft processes, or modify the software to suit our own processes. Some key decisions regarding our processes are discussed below.

- Over 1000 hours in design and over 1700 hours in development completed to date
- Over 50 business processes were reviewed and redesigned
- 16,500 awards to be converted

Key Process Decisions in the Grants Project

- Negotiation Bolt-On—ORA has designed a major software bolt-on that will make tracking and documenting proposal and agreement negotiations much easier. A focus group of end-users were involved in the design and testing of the bolt-on. This is a major addition to PeopleSoft, but the benefits will be significant. The bolt-on will provide better visibility in proposal and agreement processing, streamline communication with ORA as well as enhance reporting and documentation.

- Project Numbering — we will retain our current project numbering schema. Our project numbering schema has the numbers begin with a “C” and the last 2 digits of the number will iterate the grant year for multi-year grants. Keeping our current schema makes the transition easier, however, PeopleSoft had to be modified to accommodate our numbers.

- Milestone Notification — PeopleSoft provides Sponsored Award Milestone Notification of upcoming award milestones (for example, a report that is coming due). It requires some set up, but it will make us more effective. We are looking forward to using this process and rolling it out to the campus. People, such as departmental staff and Principal Investigators, can be listed in the award set up to receive milestone alerts via email.

- Salary Detail— we have modified PeopleSoft to include Salary Detail on invoices. We will pull the detail from HR records, so these must be kept current, especially in regards to the source of salary funding. We will capture all sources of salary (direct, cost share, cost transfers) related to sponsored and non-sponsored projects in a single location to provide one complete source for sponsor and internal reporting.

- Cost Sharing — Over the past few months, end-user focus groups analyzed several cost sharing alternatives, but could not find a 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 chartfield. If you are going to cost share you cannot use the Project chartfield as a source of funding (for example: endowed chairs, optional projects and construction projects). Keep this in mind when preparing the FY11 budget. Additional detailed training and communication will be provided by the project team prior to project go live. If you have any questions on this process, send an email to grantspmo@ouhsc.edu.

For More Details, See our Web Site: WWW.OUHSC.EDU/GRANTS/