



# The Business & Technology Resource Group (BTRG)

## *Integrating Research Administration into PeopleSoft Financials*

*PS-SNUG*

*November 03, 2006*



# Agenda

- Common Research Administration Challenges
- PeopleSoft Benefits
- Core Research Administration Solution
- PeopleSoft Features
- Integration
- Commitment Control
- Questions

# About BTRG

- Full service consulting firm operating in the USA and Canada
- Founded in 1986
- One of the first PeopleSoft Partners to implement PS/Financials
- We offer solutions for
  - ERP, CRM, Supply Chain & Custom development
  - Strategic Services
  - Application Integration and Middleware
  - Business Intelligence

# About the Speaker

- Cerelia Sumlin, CPA
  - Senior Solutions Manager
  - Accounting background in Federal Aid receivables, accounts payable, and employee travel.
  - PeopleSoft consultant for 8 years
  - Worked with PeopleSoft Grants since first release in v7.5
  - Former PeopleSoft employee
    - Served as Product Lead for Grants Module
    - Attended several conferences as a PeopleSoft Expert

# Common Research Admin. Challenges

- Separate systems for pre-award, post-award, general ledger, billing, and HR/Payroll.
- Untimely information due to separate systems
- Data is often manually re-entered between systems, which increases errors
- Difficult to report research activity

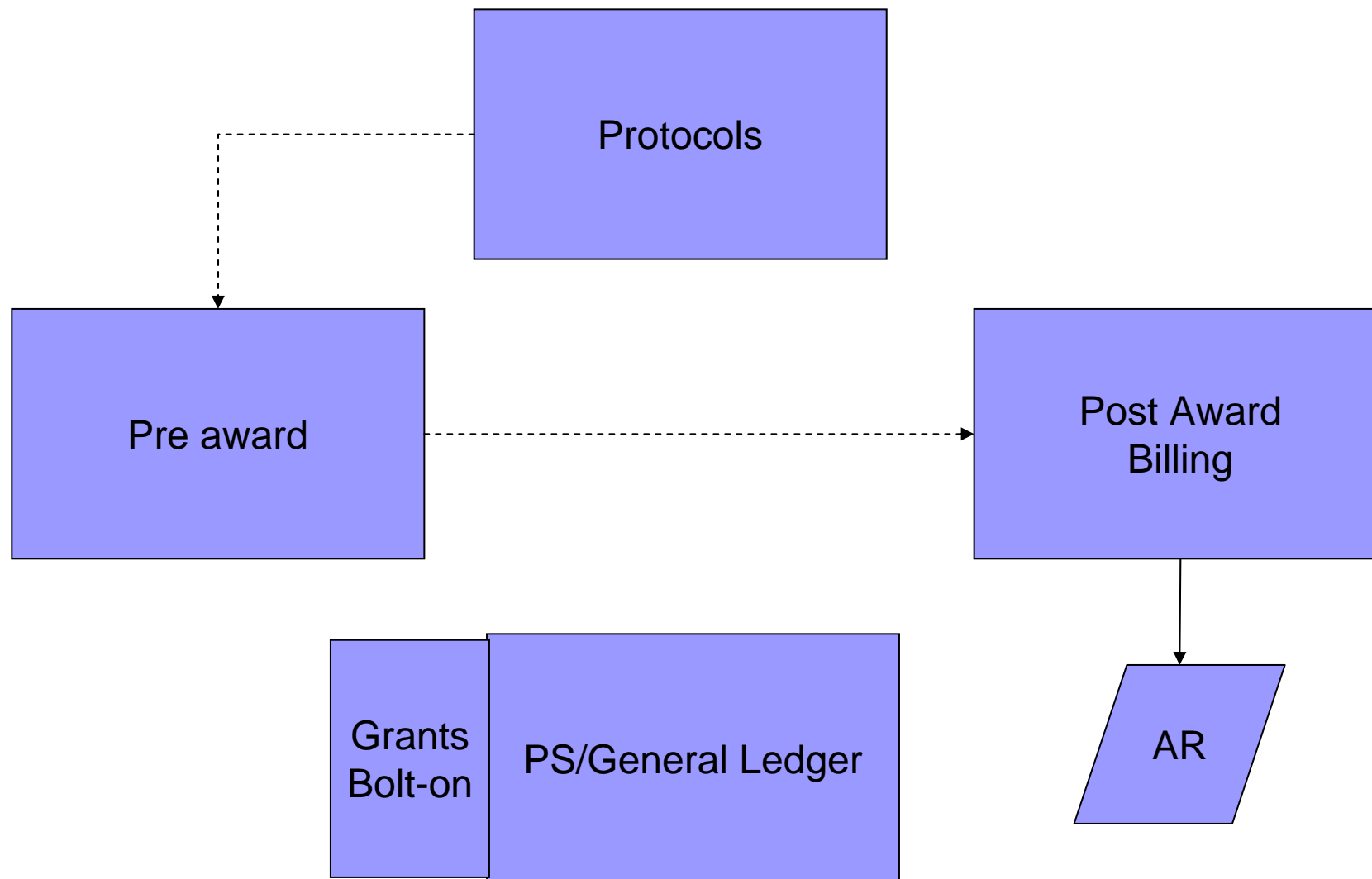


# Common Research Admin. Challenges

- Large amount of information about an award is still maintained in paper files
- Difficult to track and report researchers' effort
- Cost share requirements are often managed offline
- Budgets may be overspent with deficit's falling on the institution



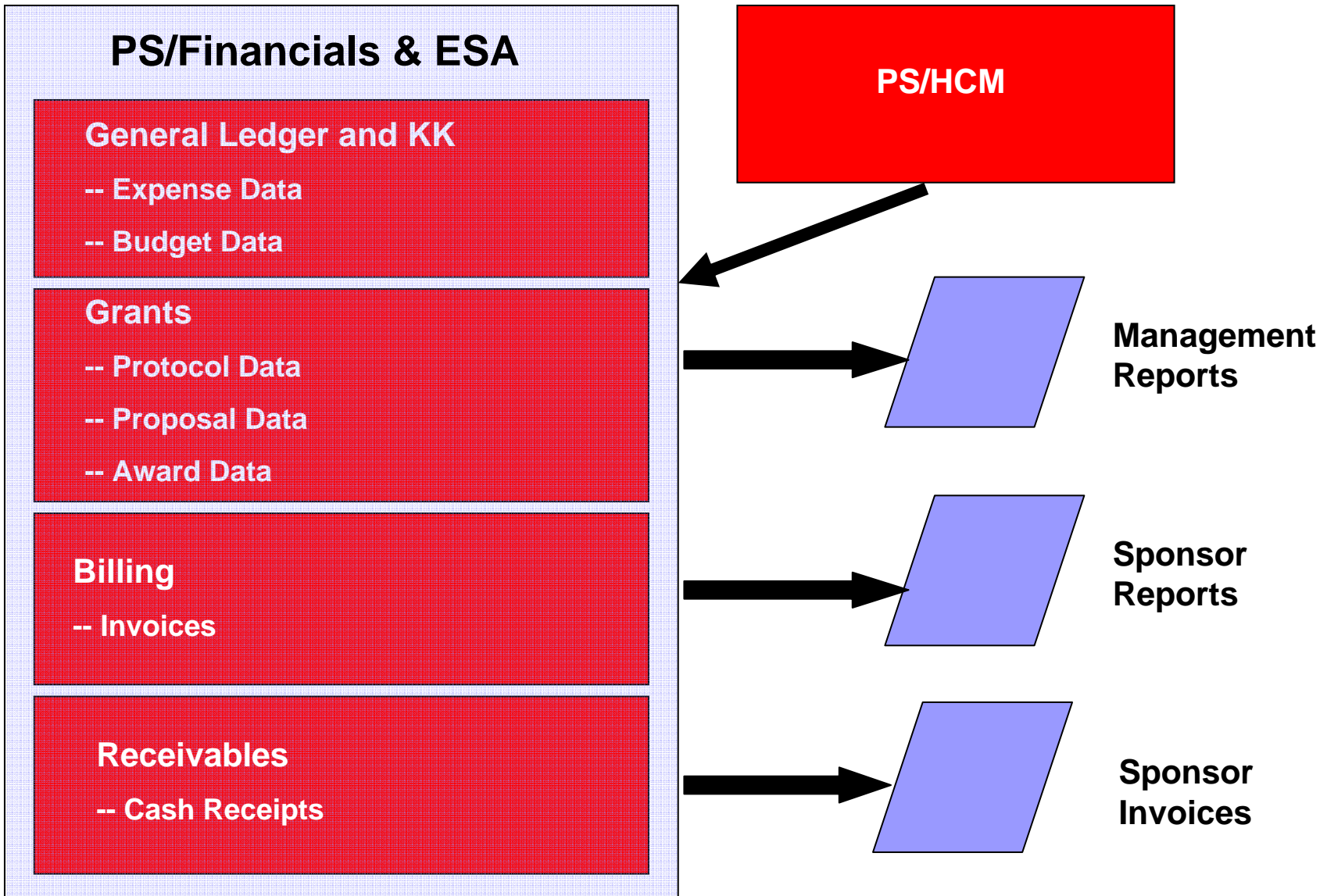
# Example Current Research Systems



# PeopleSoft Benefits

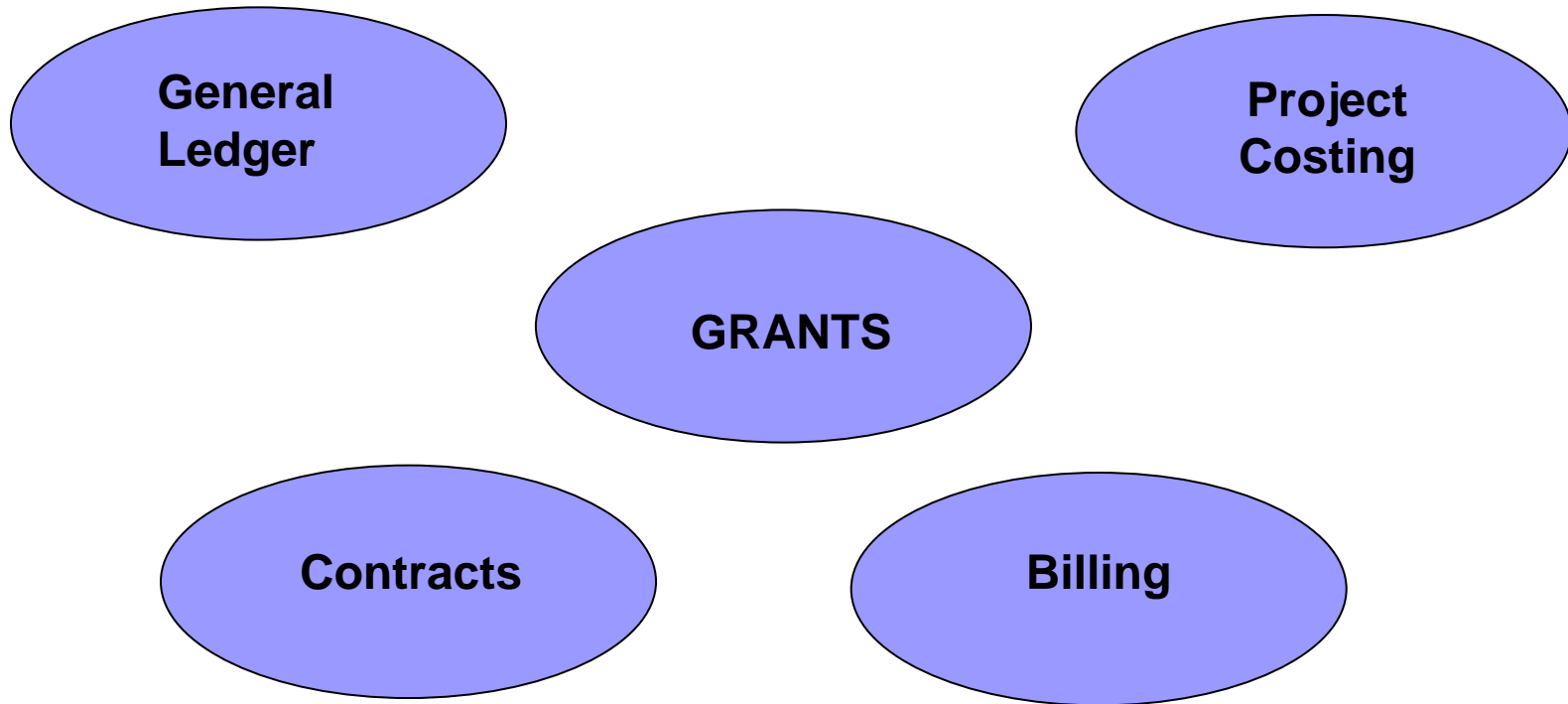
- Integrated Solution
  - General Ledger, Pre Award, Post Award, and Billing are all integrated
  - Interfaces with PS/HCM
- One point of data entry which reduces errors
- Real Time information allows for greater visibility
- Increase in efficiency
- Award rules are applied system wide for consistency

# PeopleSoft Benefits Illustration

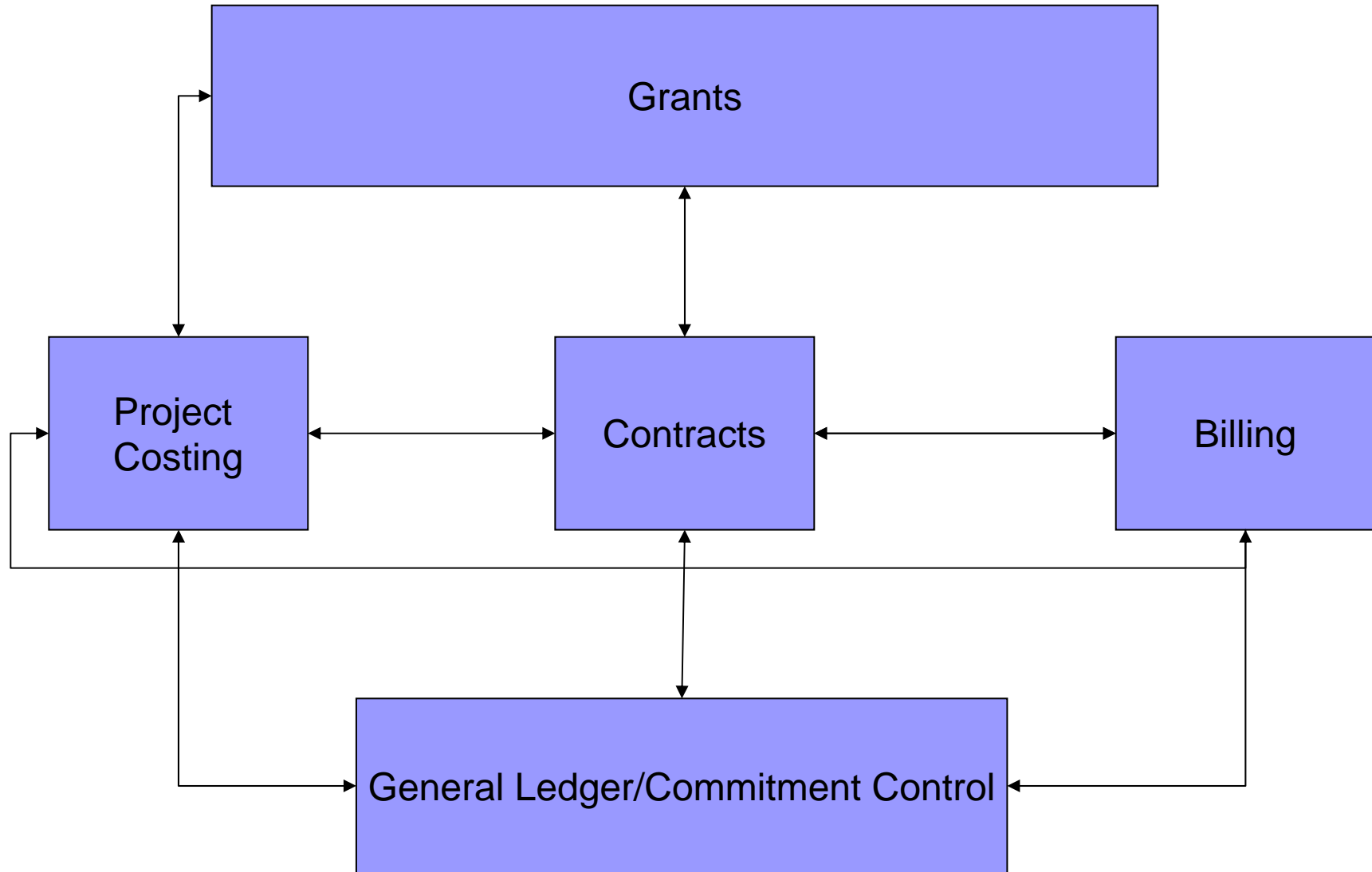


# The Core Research Administration Solution

**The core modules include:**



# Core Solution Integration



# Problems and Solutions

## *The Challenge:*

Information to complete a proposal is maintained in several systems.

## *The Solution:*

PeopleSoft Grants allows users to prepare proposal budgets online, setup required approvals, and track subcontract information.

# Problems and Solutions

## *The Challenge:*

Collaborated awards are separated and managed individually, then must be manually consolidated for reporting.

## *The Solution:*

An award can be broken into multiple projects with their own PI or Project Manager. Each project can be separately managed, but billed and reported as one award.

# Problems and Solutions

## *The Challenge:*

Awards may be over-billed to the sponsor due to untimely information.

## *The Solution:*

Contract Limit processing will automatically manage billing limits and indicate which expense lines are over the limit. Users can then make appropriate adjustments.

# Problems and Solutions

## *The Challenge:*

Awards have separate deadlines for interim and final reporting.

## *The Solution:*

Grants Milestones allows you to setup reporting deadlines for each award, and generate email notifications to remind responsible parties of when each report is due.

# Features: Grants Center

The screenshot shows the PeopleSoft Grants Center interface within a Microsoft Internet Explorer browser window. The browser title is "Grants Center - Microsoft Internet Explorer". The address bar shows the URL: [http://www.btrgroup.com:7300/psp/fin89dmo/EMPLOYEE/ERP/s/WEBLIB\\_PTPP\\_SC.HOMEPAGE.FieldFormula.IScript\\_AppHP?scname=EP\\_GRANTS\\_CENTRAL](http://www.btrgroup.com:7300/psp/fin89dmo/EMPLOYEE/ERP/s/WEBLIB_PTPP_SC.HOMEPAGE.FieldFormula.IScript_AppHP?scname=EP_GRANTS_CENTRAL). The browser's menu bar includes File, Edit, View, Favorites, Tools, and Help. The toolbar contains icons for Back, Forward, Stop, Home, Search, Favorites, and other standard browser functions. The main content area is titled "Grants Center" and features a navigation menu on the left and a central grid of functional tiles. The navigation menu includes categories like Grants, Awards, Protocols, and various management tools. The central grid contains tiles for: My Proposals, Proposal Management, Copy Proposal, Print Proposal, Protocol Management, Generate Award, Manage Award, Facilities and Administration, Contracts, Project, Reports, and Definitions. Each tile provides a brief description and links to specific sub-functions.

**Menu**

- Grants
  - Proposals
  - Awards
  - Protocols
  - Institutions
  - Sponsored Projects
  - Offices
  - Departments
  - Professionals
  - Sponsors
  - Subrecipients
  - Interactive Reports
- Grants Center
  - My Proposals
  - Program Management
  - Project Costing
  - Proposal Management
  - Maintenance Management
  - Resource Management
  - Lease Administration
  - Staffing
  - Travel and Expenses
  - Billing
  - Accounts Receivable
  - Accounts Payable
  - eSettlements
  - Asset Management
  - IT Asset Management
  - Banking
  - Cash Management
  - Deal Management
  - Risk Management
  - Financial Gateway
  - VAT and Intrastat
  - Excise and Sales Tax IND
  - Commitment Control

**Main Menu > Grants >**

**Grants Center** Edit "Grants Center" Collection

Access the grants management center.

- My Proposals**  
Manage proposals from a personal list.
- Proposal Management**  
Establish proposals and versions, prepare budgets, and submit them for printing.
  - Maintain Proposal
  - Enter Budget Detail
  - Submit Proposal
  - 4 More...
- Copy Proposal**  
Create a new proposal from an existing proposal.
- Print Proposal**  
Print a proposal for submission to a sponsor.
- Protocol Management**  
Establish protocols and versions and submit them for approval.
  - Maintain Protocol
  - Enter Protocol Detail
  - Copy Protocol
  - 5 More...
- Generate Award**  
Create award management entities.
- Manage Award**  
View or update an award profile, project, activity, or award budget.
  - Award Profile
  - Project
  - Project Activity
  - 6 More...
- Facilities and Administration**  
Generate overhead expense data.
  - Process Facilities Admin
  - Facilities Admin Error Detail
- Contracts**  
Enter and manage your revenue contracts, including several billing and revenue recognition options.
  - General Information
- Project**  
Establish project information and associate contracts and activity definitions.
- Reports**  
View variance, forecast, and inventory online reports.
  - Project Variance
  - Project Forecast
  - Proposal Inventory
  - 2 More...
- Definitions**  
Define grants.
  - Business Unit
  - Professionals
  - Institutions
  - 6 More...

# Features: Business Processes

Proposal  
Preparation

Project  
Administration

Award  
Funding

Financial  
Reporting

Proposal  
Submission

Protocol  
Management

Budget  
Administration

Project  
Analysis

Letter of Credit  
Processing

Award  
Administration

F&A Cost  
Processing

Award  
Closeout

Payment  
Processing

Award  
Negotiation

Bill  
Creation

Grants  
Workflow

# Features

- Online proposal preparation
  - Multiple Projects
  - Assign key personnel up front
  - Keywords to classify research activity
  - Multiple F&A Rates and F&A Bases
  - Automated Calculation of Fringe
  - Track mandatory and voluntary Cost Share
  - Multiple-Year budget preparation and escalation
  - Track subrecipient information such as the Sub's PI and sub's budget

# Features

- Workflow approvals
- Concurrent Submission tracking Track intellectual property
- Track flow through activity
- Maintain department credit percentages
- Manage pending support and current support

# Features

- Protocol Management
  - Manage human protocols
  - Manage animal protocols
  - Manage the approval process

# Features

- Automated Award Generation
  - Generate Award from proposal to reduce data entry and increase data integrity
  - Reduces time for information exchanged between pre-award and post-award offices
  - Pre Award Spending
  - Project ID and Activity ID creation
  - Project Budget
  - Contract/Billing defaults

# Features

- Efficient Award Administration
  - Multiple Projects to a single award
  - Track Terms and Conditions for each award
  - Track Certifications
  - Attributes to configure other user-defined data
  - Milestone Workflow to send email notifications on interim reporting, final reporting, etc.
  - Delivered SF-269 and SF-272

# Features

- Fully Integrated Project Administration
  - Project ID Chartfield to record costs
  - Project Costing features
  - Drill down into transactional systems such as AP and GL
  - Project Status to control costs
  - Project Analysis

# Features

- Automated F&A (indirect cost) calculation
  - Multiple F&A Rates
  - Multiple Modified Total Direct Cost structures
  - Effective dating for rate changes
  - Defaults for the Institution and the Sponsor
  - Sponsored F&A, Cost Shared F&A, and Waived F&A

# Features

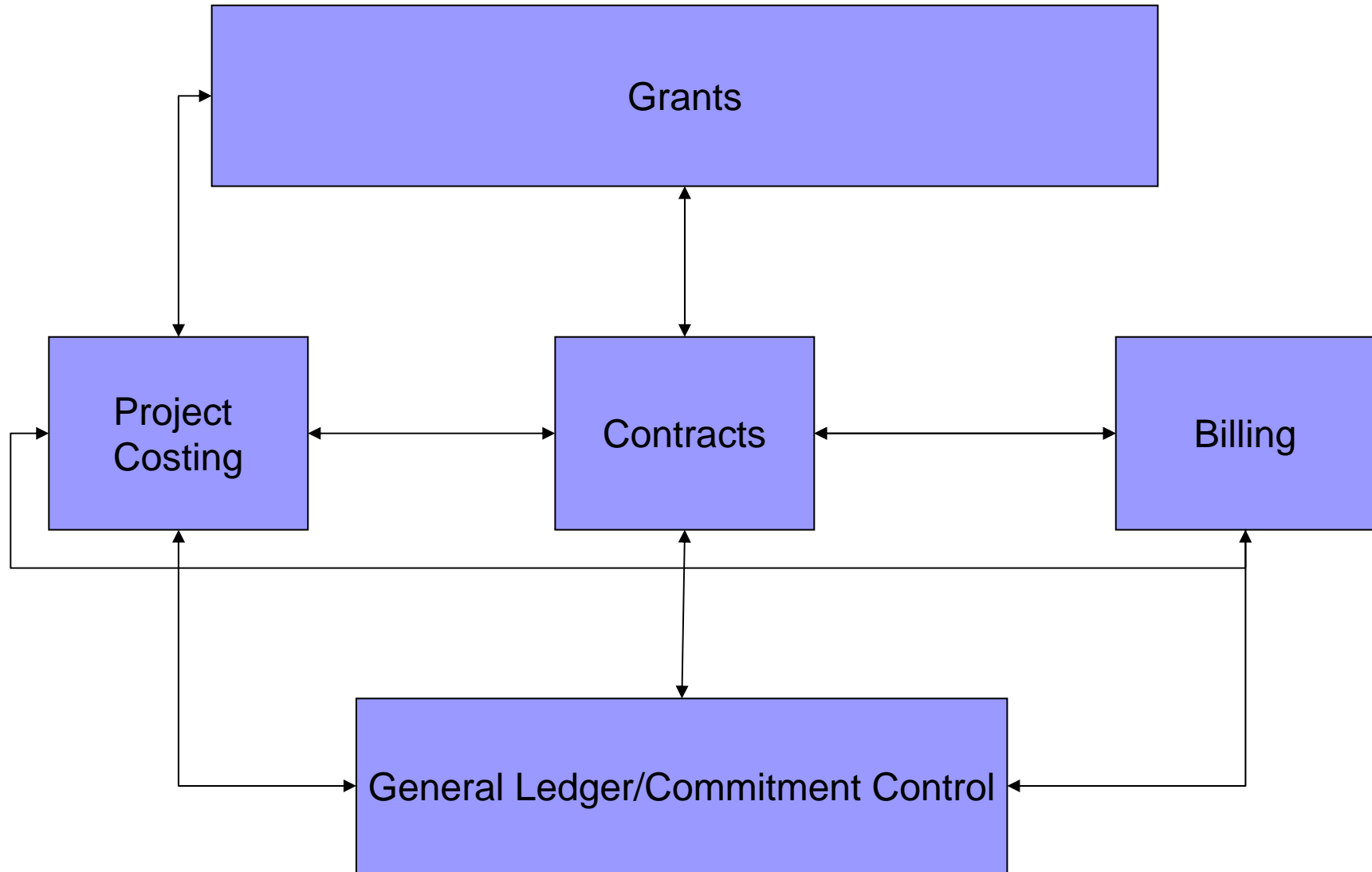
## ■ Grants Billing

- As-incurred/Cost reimbursable billing
- Fixed price billing – various methods
- Project Billing Limit
- Milestone Billing (typically used for Clinical Trials)
- Advance Billing
- Retainages

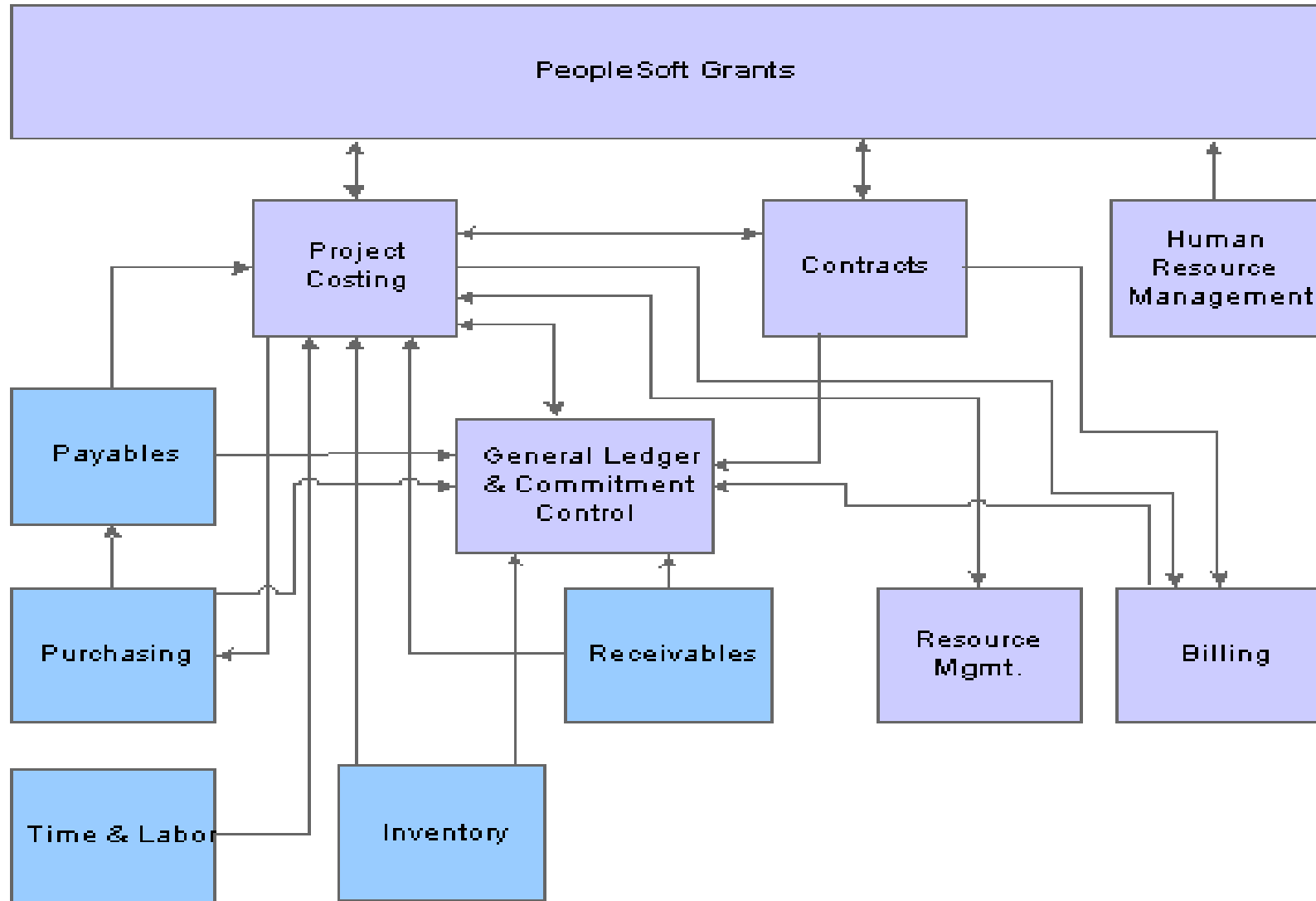
# Features

- ❑ Flexible revenue recognition that is independent from Billing Cycle
- ❑ Letter of Credit draw reports
- ❑ Billable item identification
- ❑ Manage multiple billing cycles
- ❑ Delivered SF1034/1035

# Core Solution Integration



# Integration with other FIN modules and HCM



# Problems and Solutions

## *The Challenge:*

Grants open receivables are often managed offline and may not reconcile with the General Ledger.

## *The Solution:*

Accounts Receivable will manage your grants receivables and automatically stay in balance with GL.

# Integration with Receivables

When you add in Receivables, you get:

- **Payment Processing**

- Lockbox and Bank Statement processing
- Easy payment identification
- Payment Predictor

- **Receivables Analysis**

- How long it takes for each sponsor to pay
- Easily identify past due receivables through Aging Analysis
- Statements

- **Option to record receivables and cash at the Project Id level**

# Integration with AP, Expenses, PO, and Inventory

When you add in AP, Expenses, PO, and Inventory, you get:

- Immediate recording of expenses to your Grant
- Pre-Encumbrance and Encumbrance liquidation in Project Costing
- With Commitment Control, immediate budgetary control of expenses and allowable costs

## Integration with AP, Expenses, PO, and Inventory

- Assets can be recorded to a Grant up front during procurement process, and capitalized in Assets module afterwards
- With Expenses module, ability to control which employees can charge travel expenses to the Grant
- Track Subrecipient costs easily

# Integration with PS/HCM

When you add in PS/HCM you get:

## ■ Personal Data

- Employee ID for security and reporting consistency
- Job and salary information for proposal budgets
- Education and accomplishments for Biosketch/CV preparation
- Supervisor information for Workflow approvals
- Keywords associated to a PI to assist in collaboration

# Integration with PS/HCM

When you add in PS/HCM you get:

## ■ Payroll

- Salary expense recorded to the grant up front instead of making adjustments in GL

## ■ Time & Labor

- Effort reporting
- Timesheet tracking
- Ability to control which employees can charge their time to a grant
- Detail salary expense needed for reporting

# Commitment Control for Grants

With Commitment Control you can:

- Control costs: amount and/or allowable
- Build budgets at various levels of detail to meet various sponsor requirements
- Build multiple-line and multiple-year budgets
- Manage budget by grant year, rather than by fiscal year
- Encumber expenses in Purchasing

# Commitment Control for Grants

- Build your proposal budget by using Budget Categories
- Budget Categories are translated into General Ledger accounts
- Complete and post your Budget within Grants
- Commitment Control is automatically run in the other modules and it checks the rules of your project budget in order to pass a transaction
- Real-time information. PIs and administrators can know exactly what's left in their budget and when it expires

## In Conclusion...

- ✓ **Get all your proposal, award, contract and project data in one place**
- ✓ **Define all the rules for managing your Grants in a system so they're applied consistently**
- ✓ **Greater visibility into Grant finances and activity = less adjustments after the fact**
- ✓ **Delivered billing templates for typical granting agencies**

# Questions

# Questions?