University of Minnesota

Enterprise Financial System

Grants, Project, Contracts
Subproject

October 6, 2005
Agenda

- Sub-project Background
- Current Process
- Recommendation
- Known Gaps
- Next Steps
Background

- Strategic Goal: Top 3 research university

- EFS Goals:
  - Replacement of CUFS
  - Elimination of any related “redundant” systems or processes

- Grants modules (includes Grants, Contracts, Projects, Accounts Receivable, & Billing) were included in purchase of PeopleSoft
Current Process

High level life cycle

Proposal Prep → PRF → EGMSi → CUFS → JD Edwards

EGMS
Recommendations

- Retain EGMS for proposal preparation and routing
- Use of full PS Grants suite to replace remaining grants systems:
  - Grants
  - Contracts
  - Projects
  - A/R
  - Billing
Recommendations

- Reasons
  - Data in one format
  - Integrated F&A expenditures and allocations
  - Enhanced functionality
    - LOC, Cumulative quarterly 272 reporting, Separate Grants Ledger, Sub-recipient tracking, Cost share tracking, Multiple budgets, Multiple revenue recognition methods
  - Commitment control
  - Continued use of EGMS Proposal Prep
Recommended Process

High level life cycle

Proposal Prep → PRF → EGMSi → CUFS → JD Edwards

Retained

Eliminated
Known Gaps

- Notice of Grant Award (NOGA)
- Tracking Statuses (aka – progress of award set-up)
- Multiple invoice forms
- Material Transfer Agreement tracking
- Accountant Workbench
Next steps

- Project approvals
- Project planning
- Determination of impact on EFS project
- Fit/Gap of full functionality
- Implementation of full functionality
Questions?

- Brittany Lloyd
  - OVPR
  - 612-624-0411
  - lloyd020@umn.edu