SESSION #4629

Sponsor Setup Automation from InfoEd to PeopleSoft

Meet the Project Lead

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Senior Business Systems Analyst

I'm Abhi, a Senior Business Systems Analyst at the University Information Services at CU System. Working to implement new solutions, data & reporting automation, process improvements, and maintaining the existing PeopleSoft ERP systems, Integrations, and Business Intelligence at CU.

I graduated with a Master's in Information Systems and an MBA in Management from the CU Denver Business School.

About the University of Colorado

4 Campuses: Boulder, Denver, Colorado Springs, and Anschutz Medical and a System Administration Office

Over 66,000 active students across its four campuses, over 490,000 alumni

Over 9,474 Faculty and Instructors, over 37,000 employees

CU researchers received more than $1.4 billion in sponsored research funding and gifts supporting research in FY 2023-24 to advance knowledge, create businesses and foster discovery and innovation

CU System Economic Impact on Colorado was $17.2 billion in FY 2023-24.

PeopleSoft 9.2 PUM 51
PeopleTools 8.61.07
Modules: GL, AP, PO, Billing, Grants, Contracts, PC, AR, and AM

InfoEd ERA System
Version: 15.902.05
Modules: PD, PT, AT, FT, COI, and HS

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Sponsors in InfoEd and PeopleSoft

A history of the pain points of managing the sponsors in both systems.

Data reconciliation issues and problems with reporting and data integrity.

The Old Manual Process

How were sponsors maintained in the previous manual process?

Disparate systems with varying data setup needs. What data was needed and why?

Explore the New Automated Solution

Sponsor Setup Automation – overview of the new solution and the different parts of the solution, including Reporting and Error handling, Business analysis, and Project management techniques used.

Lessons Learned and Where We Are Going

Opportunities for improvement and what could we have done differently.

Future state and enhancement opportunities.

Why did we need the automation?

The manual process involved redundant steps across two systems

A high risk of data errors, cause for reporting integrity issues.

A need for a streamlined, efficient solution

The goal of this project was to save hours of work. On average, we got about 10 sponsor entry requests per week, translating to almost 2 weeks spent only on this work yearly.

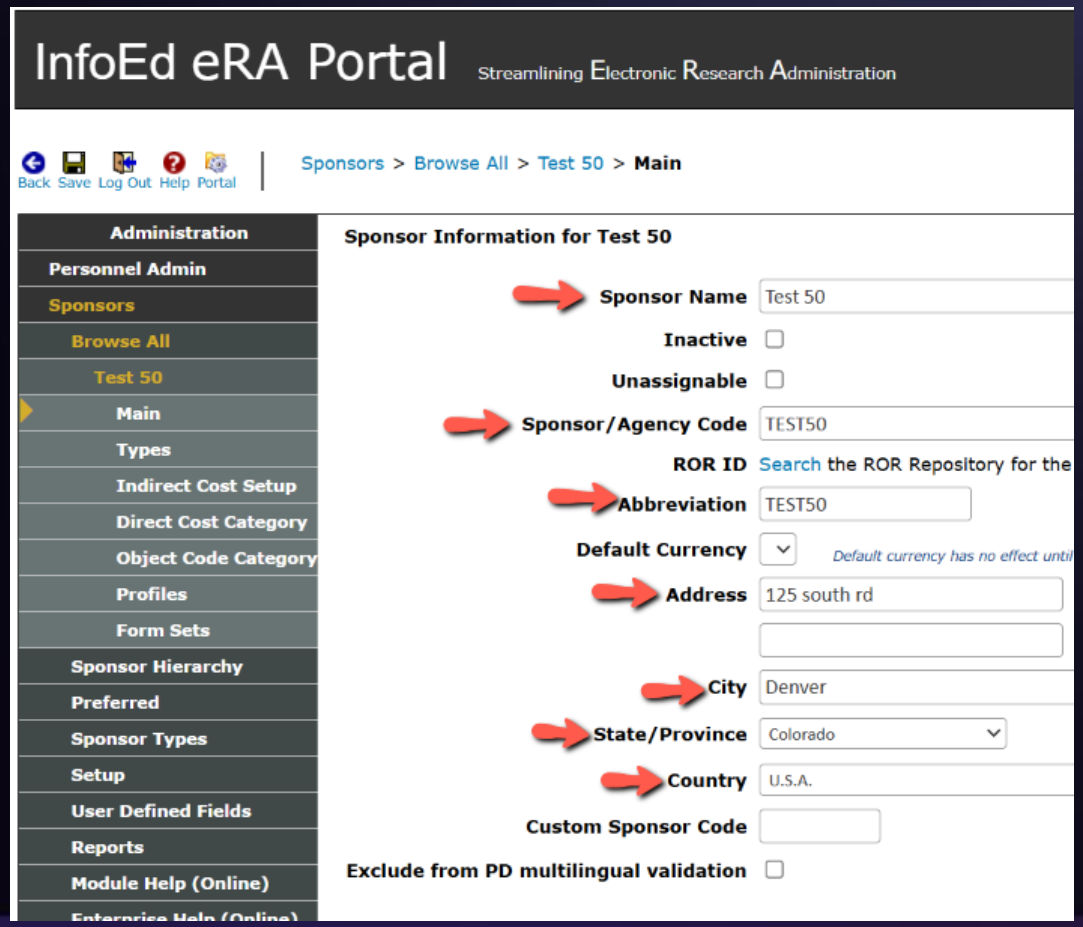
Sponsors in InfoEd and PeopleSoft

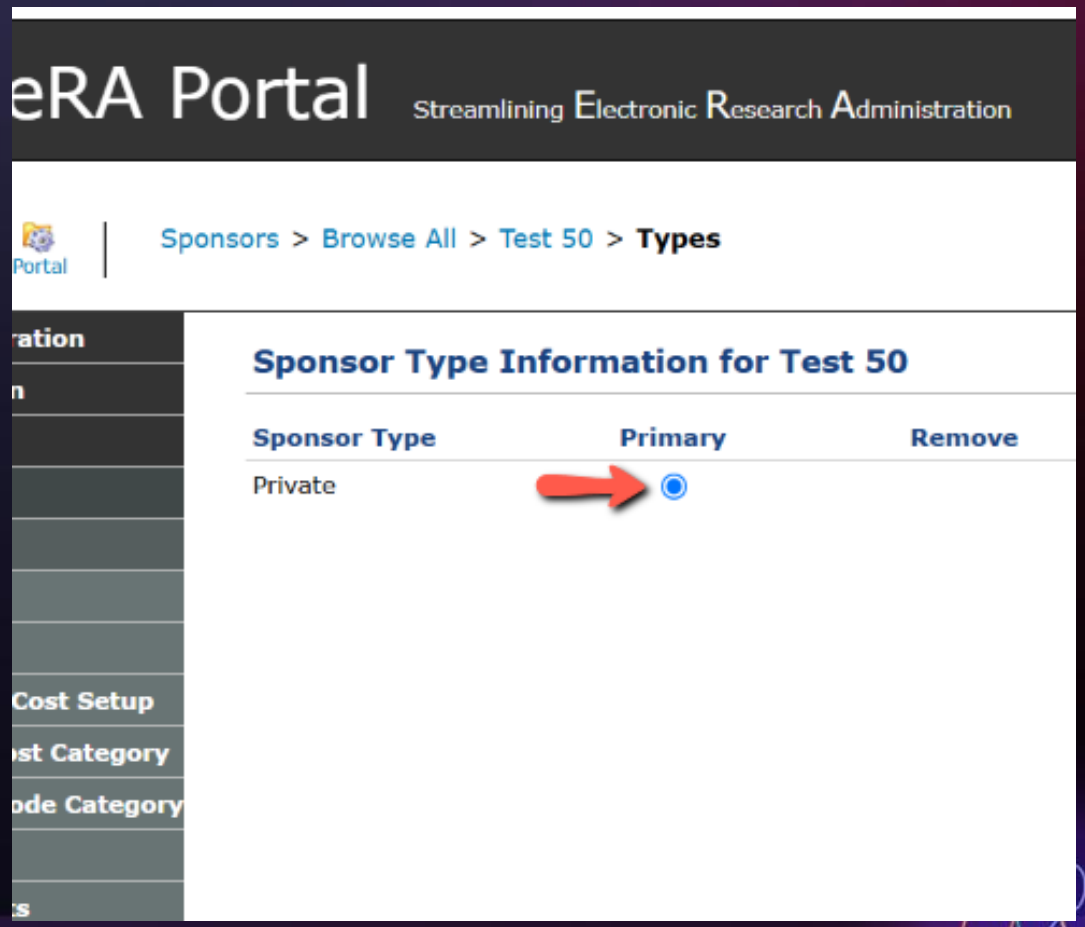
How was it done in the old manual process?

- A system check is conducted to see if they exist in the InfoEd or PeopleSoft system.
- This was done manually, searching by the Sponsor Name in both systems, prone to errors.
- Once the sponsor has been entered into the InfoEd system, the user submits the Sponsor information form through a ticket.
- Our team then verifies that there are no duplicates in the PeopleSoft system before entering them manually.

In this presentation, we will use Sponsor and Customer interchangeably. In the PeopleSoft system, they are called Customers; in InfoEd, they are called Sponsors.

Sponsor Information Pages in InfoEd





Business process improvement

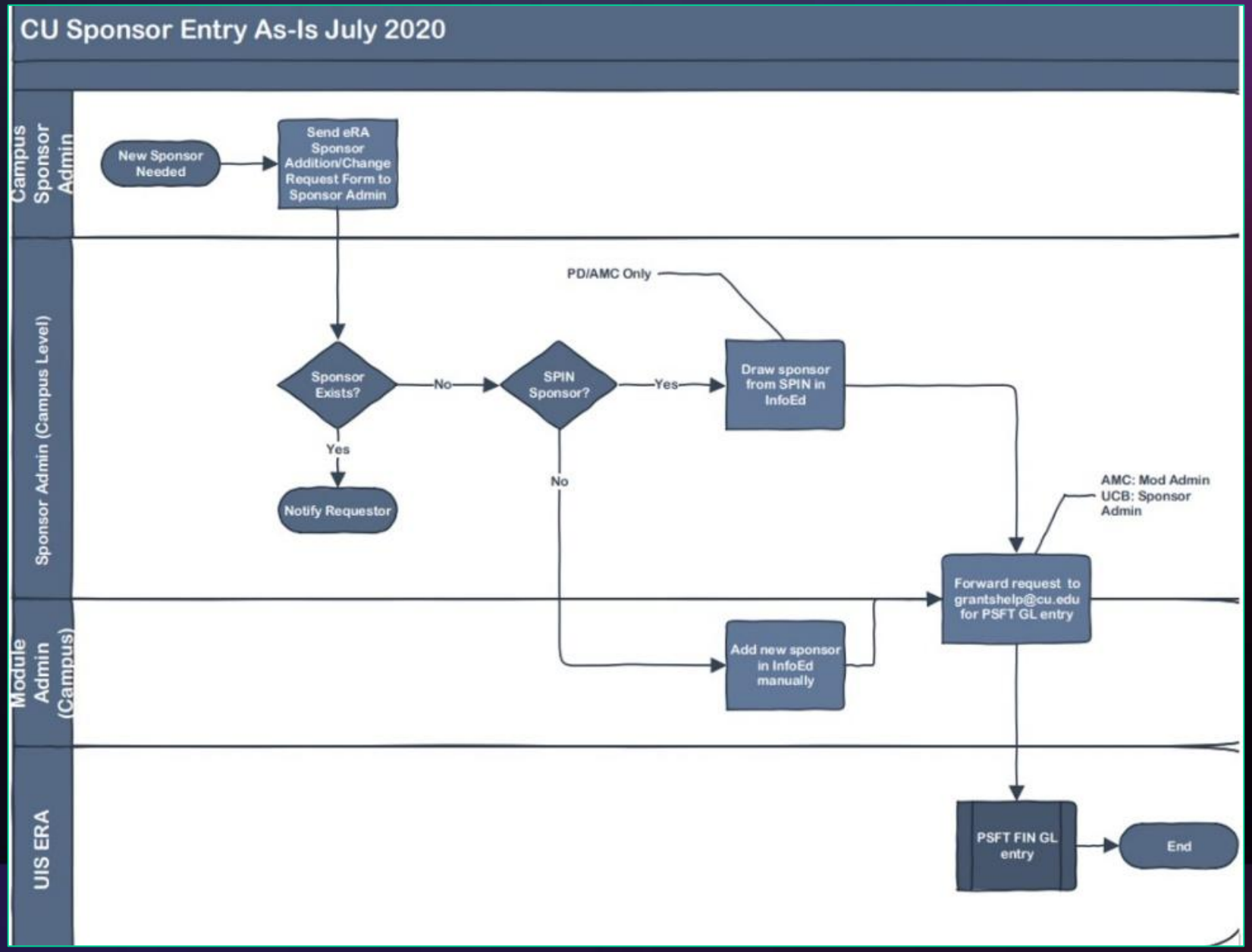
By evaluating the entire process of creating sponsors in the InfoEd and PeopleSoft systems, we found that it could be improved greatly.

Previously, there wasn’t a solution for the quick identification of similar or duplicate sponsors.

We were able to create automated email notification systems for errors and exceptions.

Time savings and reducing data inconsistencies were the major improvement factors.

Process flow diagram – Old Process



New Sponsor Setup Automation

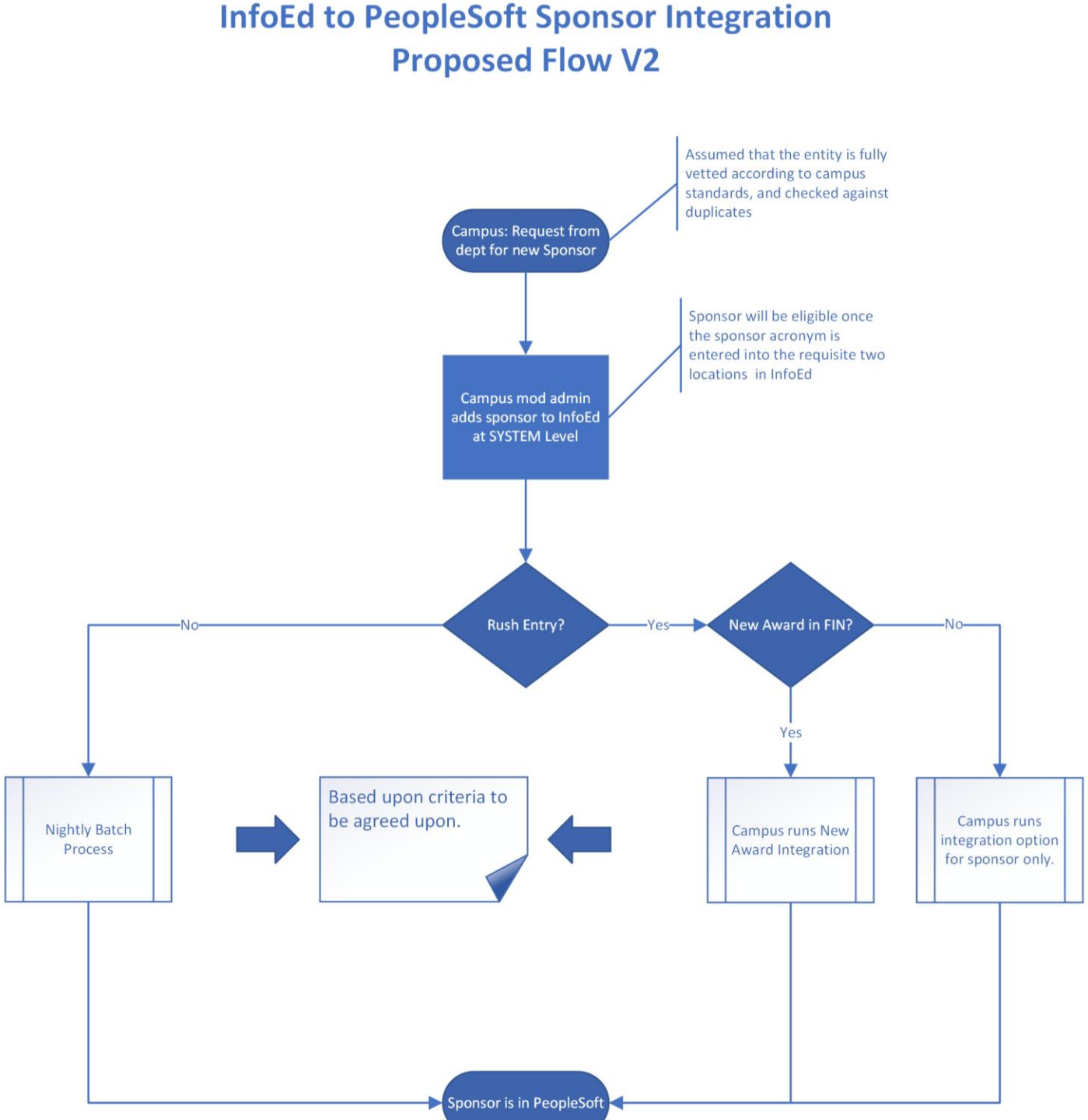
Benefits

- Increased efficiency.
- Reduced manual intervention.
- Near real-time new sponsor data sync between InfoEd and PeopleSoft
- Business Process Improvement

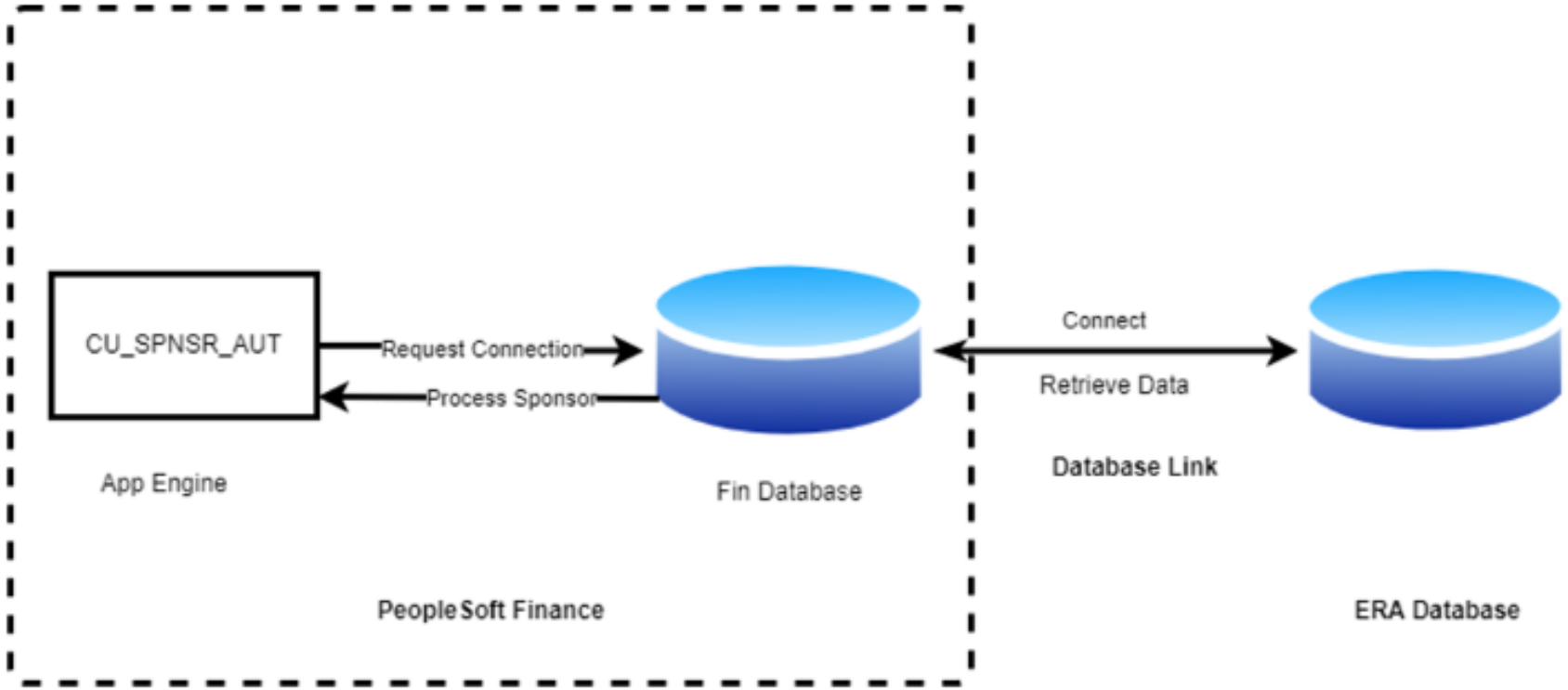
Key Features

- Only new sponsors from go-live will be set up using the automation.
- Data mapping between InfoEd and PeopleSoft.
- Runs on a schedule.
- Error handling.
- Audit and reporting.

Current flow of the Sponsor Setup Automation

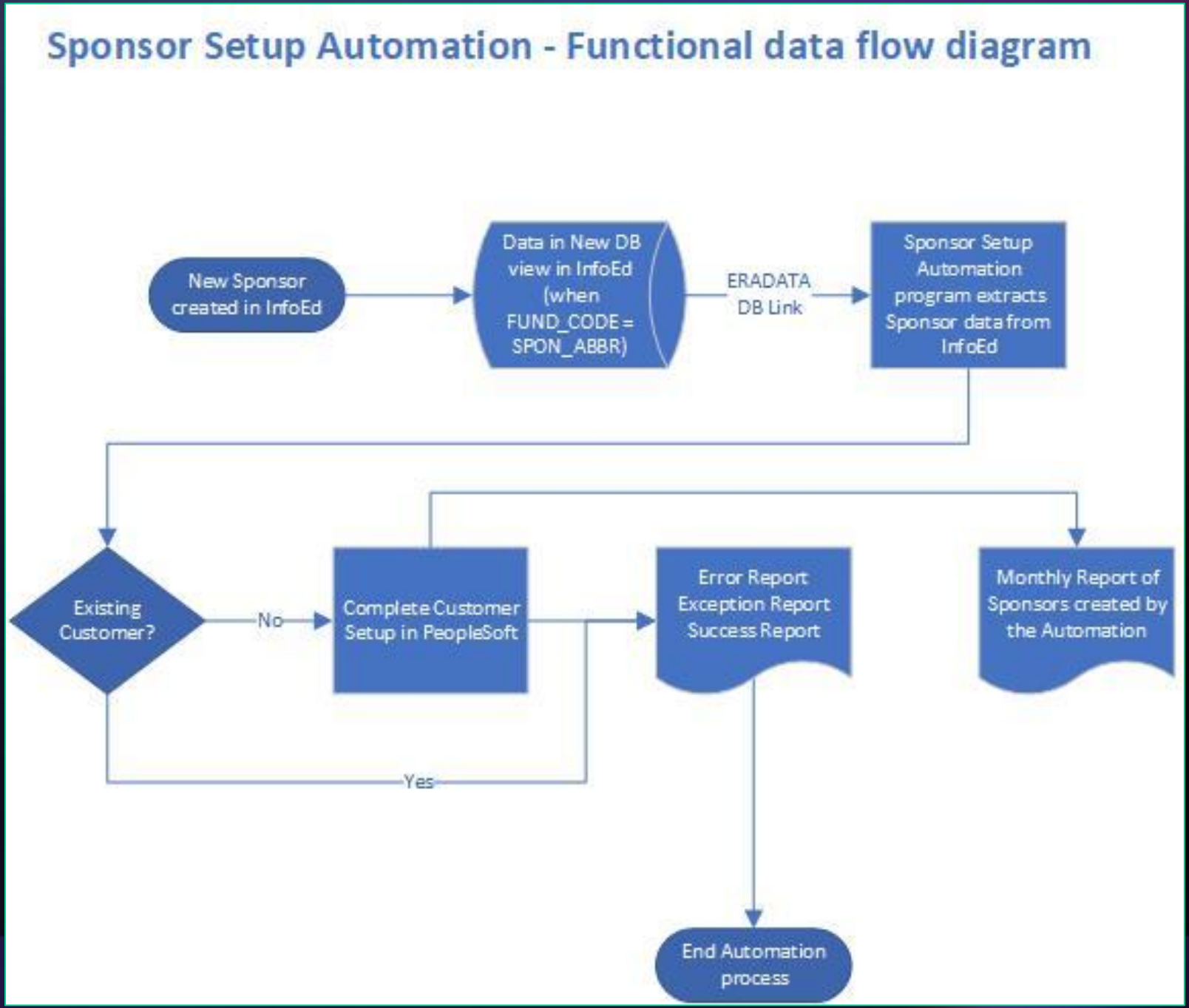


Software Architecture Diagram

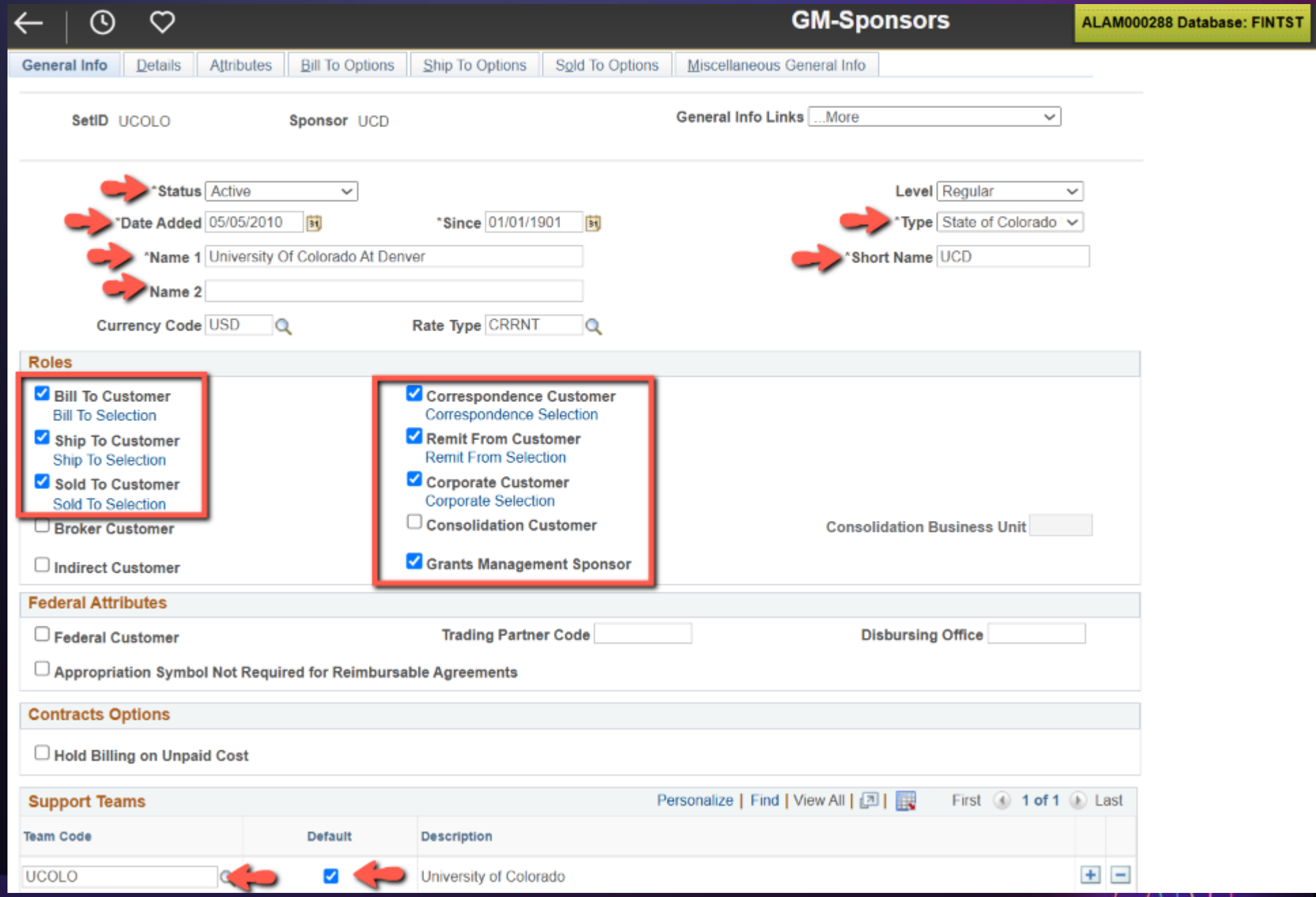


Software Architecture Diagram

Functional Flow Diagram



PeopleSoft Fields for New Sponsors



Address Locations

Find | View All First 1 of 53 Last

*Location 1

*Description Bill To

- [x] Bill To — [x] Primary
- [x] Ship To — [x] Primary
- [x] Sold To — [x] Primary

- [ ] Broker — [ ] Primary
- [ ] Indirect — [ ] Primary
- [x] Correspondence Address

[ ] RFID Enabled VAT Default VAT Service Treatment Setup

Address Details

Find | View All First 1 of 1 Last

*Effective Date 07/01/2009

*Status Active

Tax Code

Language Code English

Physical Nature

Where Performed

Alternate Name 1

Alternate Name 2

Country USA United States

Address 1 Sponsored Programs Accounting

Address 2 Campus Box 129

Address 3 P.O. Box 173364

Address 4:

City Denver

[ ] In City Limit

County

*Postal 80217-3364

State CO Colorado

View Phone Information

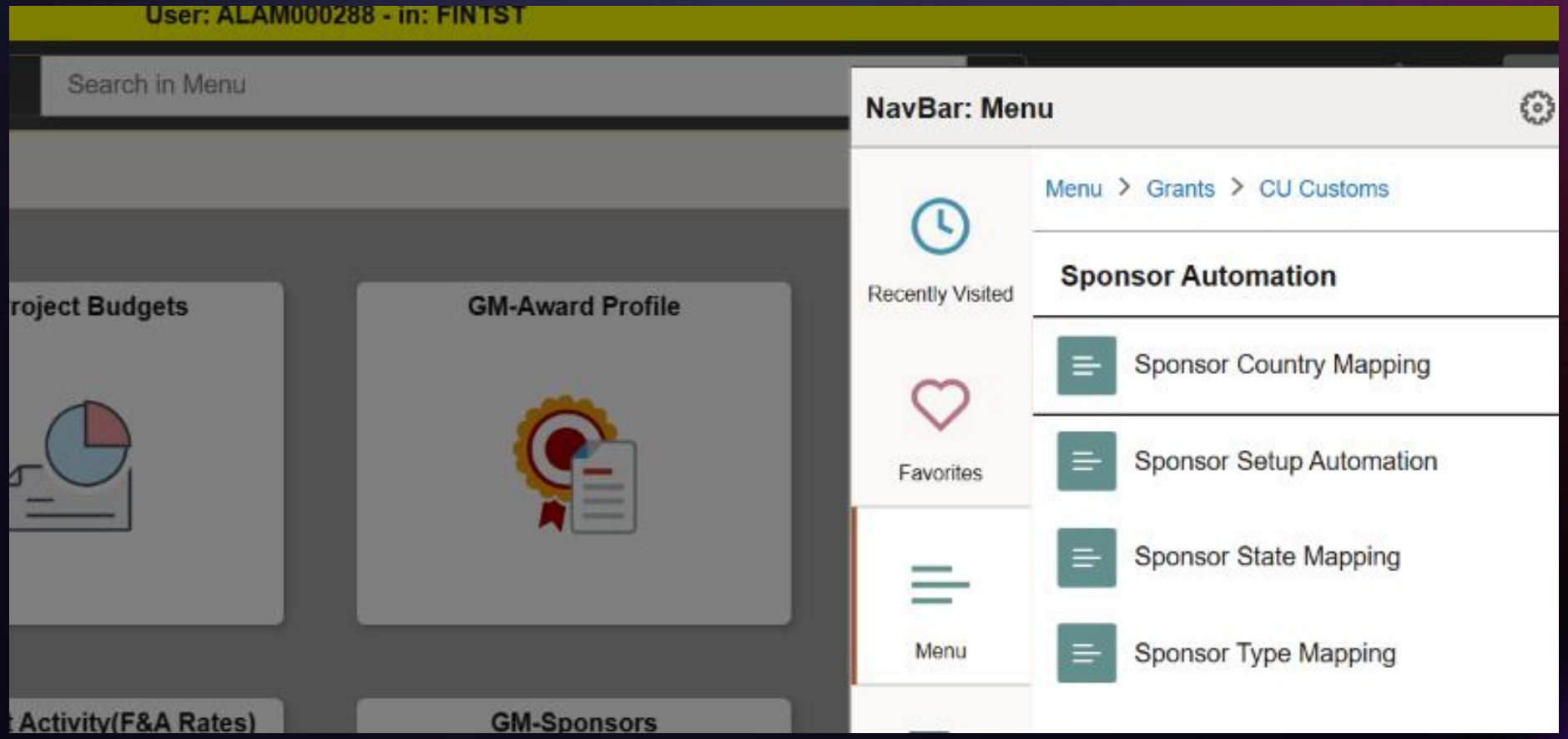
Data mapping pages

Sponsor Type mapping

State Mapping

Country Mapping

Nav Collection with the Run Control and Mapping Pages



Sponsor Type Mapping

ALAM000288 Database: FINTST

Find | First 1-18 of 18 Last

	*eRA Sponsor Type	*GM Sponsor Type	
1	A	A	Associations & Foundations
2	B	B	Private - Non Profits
3	C	C	Tobacco Rsch Fund - ST Settlem
4	D	D	Public Universities - (Not CO)
5	FF	F	Federal
6	G	G	State of Colorado Universities
7	100	H	International Government
8	J	J	Private For Profit Hospitals
9	K	K	Private Non Profit Hospitals
10	L	L	Local Govt Within Colorado
11	M	M	Mineral Impact - CO DOLA
12	O	O	Other Govt outside of Colorado
13	P	P	Private
14	103	R	International Profit
15	S	S	State of Colorado
16	102	T	International Non-Profit
17	U	U	Private Universities
18	101	V	International University

Sponsor State Mapping

ALAM000288 Database: FINTST

Sponsor State Mapping

Find | First 1-24 of 24 Last

	*Country	eRA State	PS State	Description
1	AUS	12	QLD	Queensland
2	AUS	13	VIC	Victoria
3	AUS	14	WA	Western Australia
4	AUS	4	NSW	New South Wales
5	AUS	6	NT	Northern Territory
6	AUS	AU-ACT	ACT	Australian Capital Territory
7	AUS	AU-SA	SA	South Australia
8	AUS	AU-TAS	TAS	Tasmania
9	AUS	WAU	WA	Western Australia
10	CAN	11	QC	Quebec
11	CAN	14	WA	Western Australia
12	CAN	15	BC	British Columbia
13	CAN	2	NS	Nova Scotia
14	CAN	8	ON	Ontario
15	CAN	CA-AB	AB	Alberta
16	CAN	CA-MB	MB	Manitoba
17	CAN	CA-NL	NF	Newfoundland and Labrador

Sponsor Country Mapping

ALAM000288 Database: FINTST

Personalize | Find | View 100 | First 1-10 of 273 Last

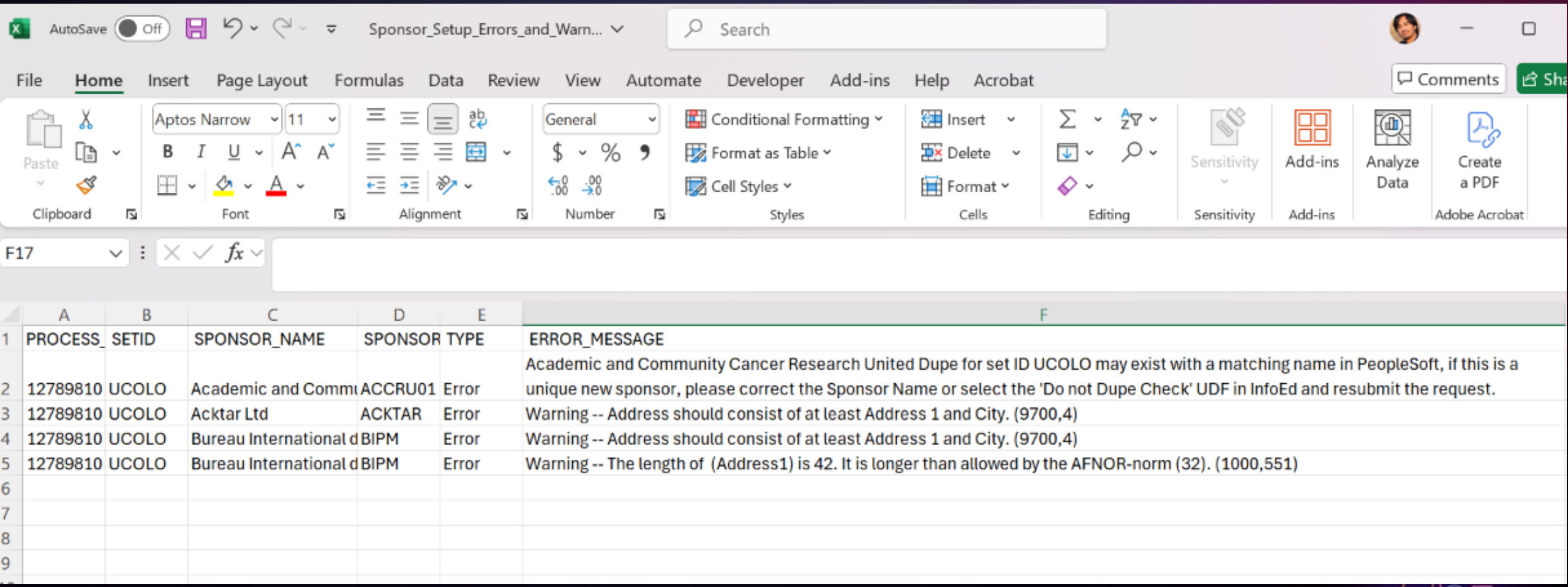
	eRA Country	*PS Country	Description
1	1004	YUG	Yugoslavia
2	1006	ALA	Aland Islands
3	1007	COD	Congo, The Democratic Republic
4	1008	CIV	Cote D'Ivoire
5	1009	HMD	Heard and McDonald Islands
6	1010	IRN	Iran (Islamic Republic Of)
7	1011	PRK	Korea, Democratic People's Rep
8	1012	LAO	Lao People's Democratic Rep
9	1013	MKD	Fmr Yugoslav Rep of Macedonia
10	1014	FSM	Micronesia, Federated States

Save Notify Add Update/Display

Error and Exception Handling

- Error report to capture any Component Interface errors and user-defined errors
- A long name exception report to capture Sponsors with a long name – the Name1 field allows only 40 characters.
- The reports are emailed automatically each time they are generated for user review and any data correction.
- If a sponsor name has an exact match to the Name1 field – a duplicate error is sent out.
- After the duplicate error review, users can skip the Duplicate check validation using a checkbox in InfoEd if it is a truly unique Sponsor.

Error Report

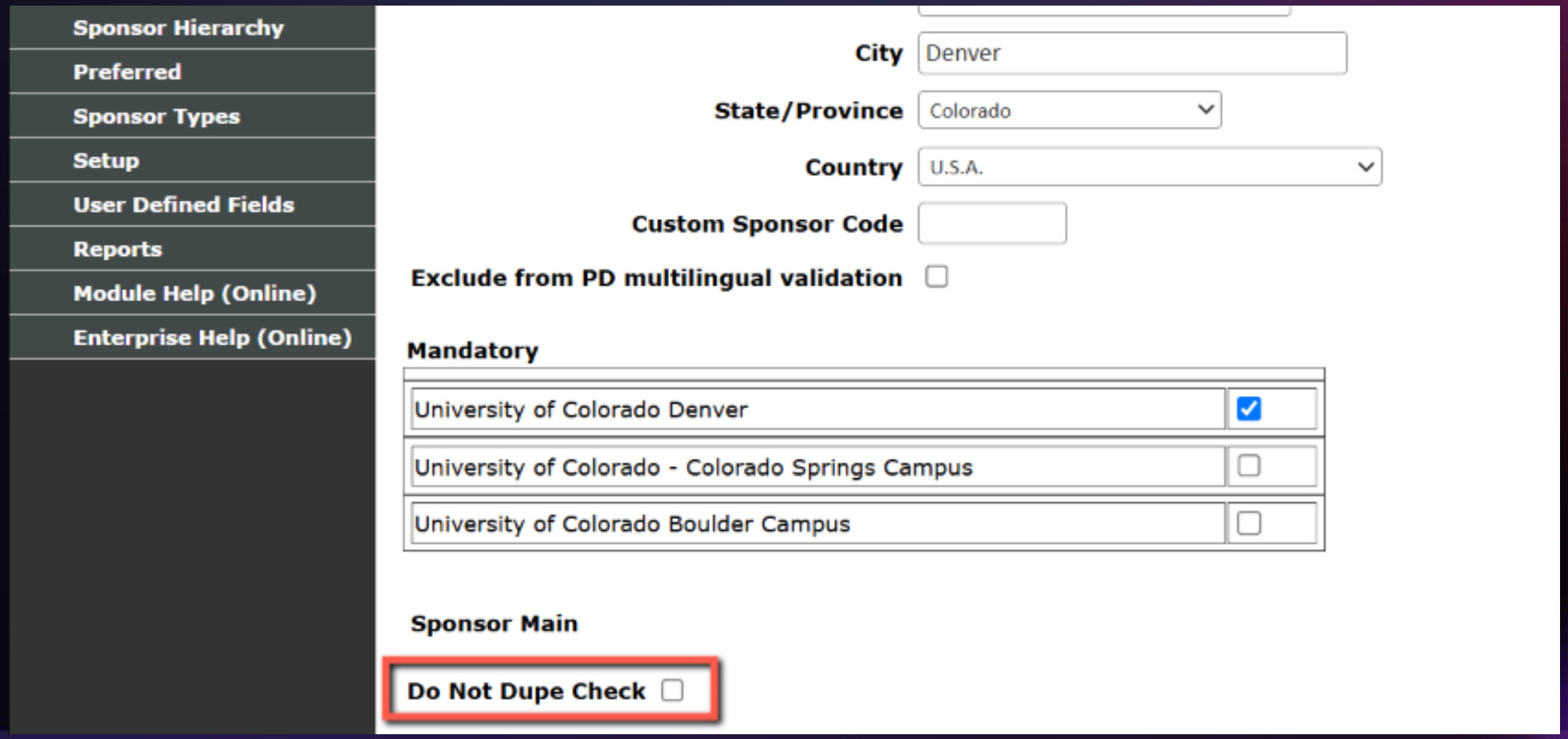


PROCESS_	SETID	SPONSOR_NAME	SPONSOR	TYPE	ERROR_MESSAGE
12789810	UCOLO	Academic and Commu	ACCRU01	Error	Academic and Community Cancer Research United Dupe for set ID UCOLO may exist with a matching name in PeopleSoft, if this is a unique new sponsor, please correct the Sponsor Name or select the 'Do not Dupe Check' UDF in InfoEd and resubmit the request.
12789810	UCOLO	Acktar Ltd	ACKTAR	Error	Warning -- Address should consist of at least Address 1 and City. (9700,4)
12789810	UCOLO	Bureau International d	BIPM	Error	Warning -- Address should consist of at least Address 1 and City. (9700,4)
12789810	UCOLO	Bureau International d	BIPM	Error	Warning -- The length of (Address1) is 42. It is longer than allowed by the AFNOR-norm (32). (1000,551)

Exception Report

PROCESS_	SETID	SPONSOR_NAME	SPONSOR	TYPE	ERROR_MESSAGE	ADDED_O	OPRID
12789810	UCOLO	Bureau International des Poids et Mesures	BIPM	Warning	Sponsor name is too long.	2025-02-1	ALAM000288
12789810	UCOLO	Federation for Innovation in Democracy - North America	FIDENA	Warning	Sponsor name is too long.	2025-02-1	ALAM000288
12789810	UCOLO	Holland Bloorview Kids Rehabilitation Hospital	HBKR	Warning	Sponsor name is too long.	2025-02-1	ALAM000288
12789810	UCOLO	The Jack H. Rubinstein Foundation for Developmental Disabilities	JRFDD	Warning	Sponsor name is too long.	2025-02-1	ALAM000288
12789810	UCOLO	United States Olympic and Paralympic Museum	USOPM	Warning	Sponsor name is too long.	2025-02-1	ALAM000288

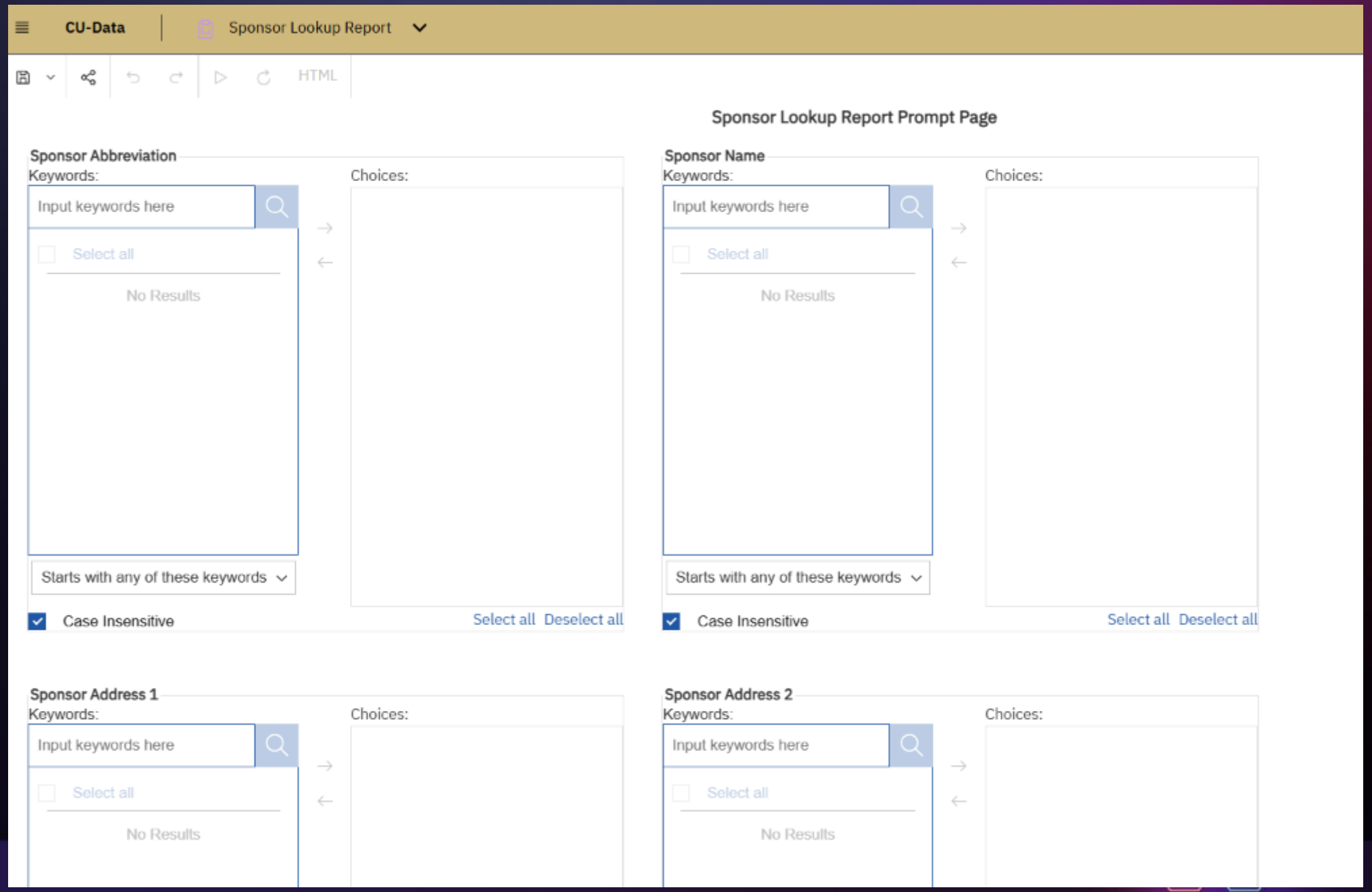
Dupe Check


Sponsor Hierarchy
Preferred
Sponsor Types
Setup
User Defined Fields
Reports
Module Help (Online)
Enterprise Help (Online)
City
Denver
State/Province
Colorado
Country
U.S.A.
Custom Sponsor Code
Exclude from PD multilingual validation
Mandatory
University of Colorado Denver
University of Colorado - Colorado Springs Campus
University of Colorado Boulder Campus
Sponsor Main
Do Not Dupe Check

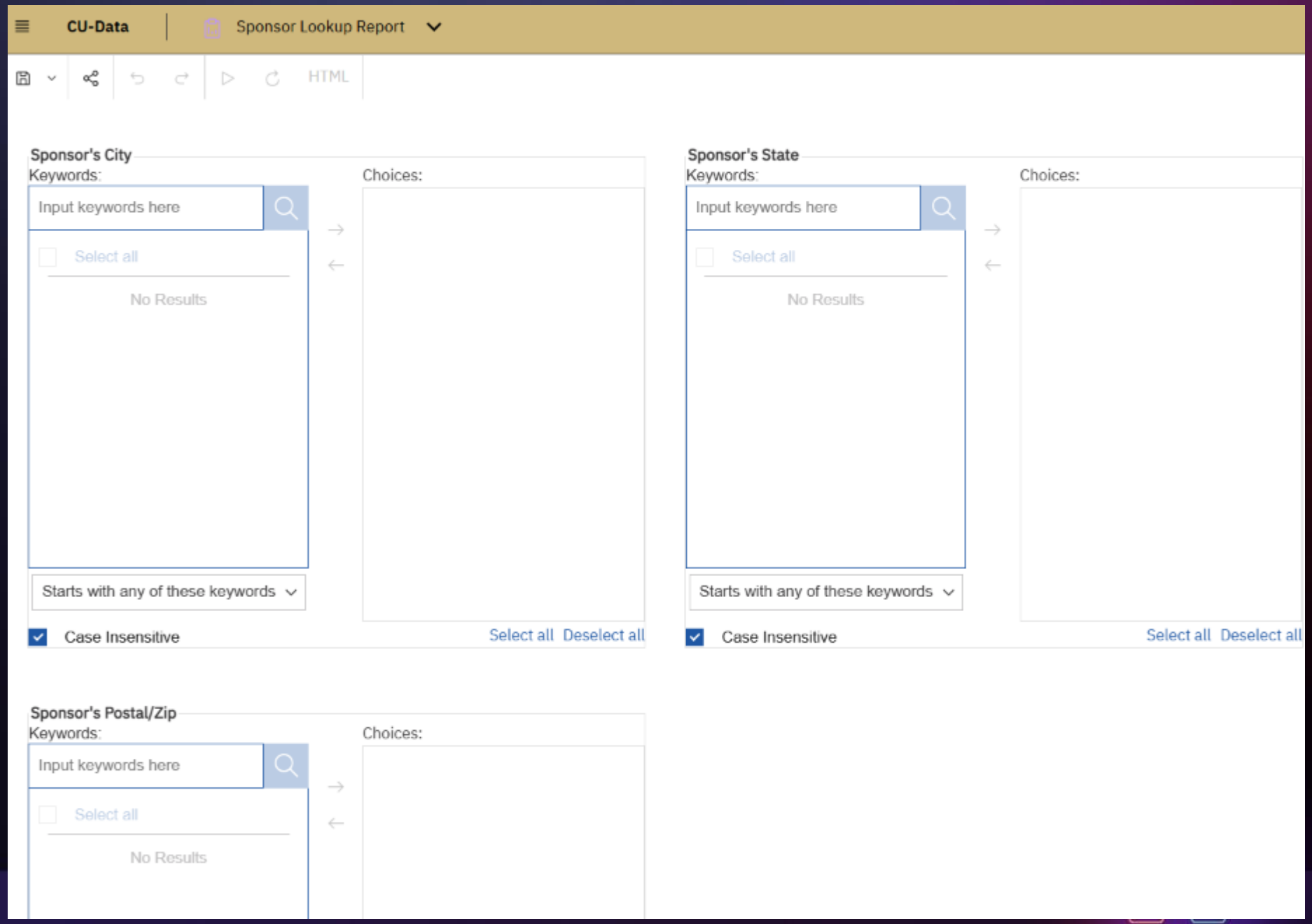
Audit and Reporting

- IBM Cognos Analytics was used as the reporting tool
- Business process improvement – Sponsor Lookup Report
- Auditing, reporting, and Setup team related – New Sponsor Since Date
- The report creation has helped reconcile data between both systems.

Sponsor Lookup Report



Sponsor Lookup Report



Project Management and Business Analysis Aspects

Project Management:

- A blended approach of Waterfall and Agile Project management.
- Clear Project goals.
- Regular progress review.
- Stakeholder engagement and communication.

Business Analysis

- Clear Requirements gathering.
- Multiple Business Process review and improvement sessions.
- Use of process flow diagrams and data mapping

Lessons learned

- Key takeaways
  - Test and test again.
  - Document everything.
  - Preview and stakeholder feedback and engagement.
  - Use the 80/20 approach and split the project into phases.

Future enhancements

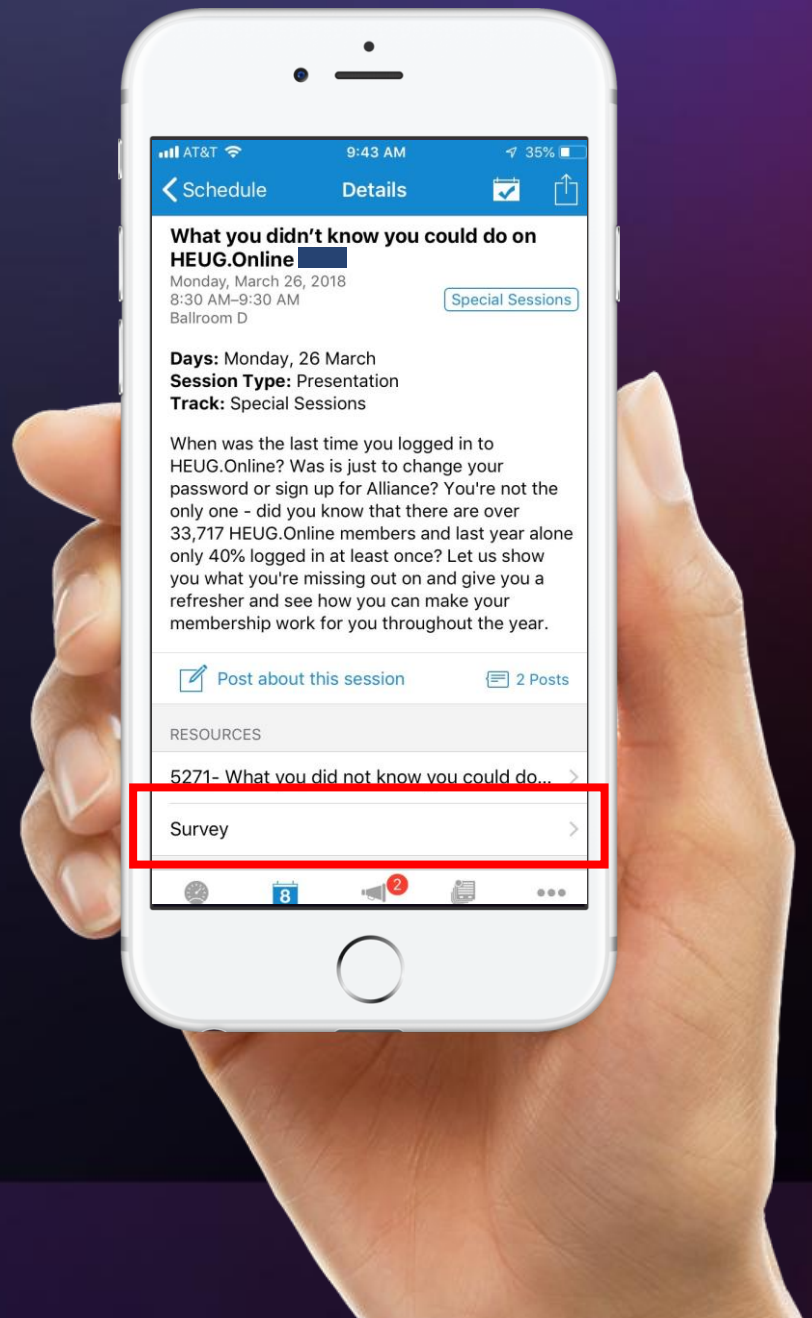
Enable updates to existing sponsors.

Updates to error management and data validation messages.

Look into options to upload sponsors using Excel.

Session Surveys

1. Open the HEUG Events App on your phone, tablet, or laptop
2. Click on this session in your schedule
3. Then click the “Resources” button and “Survey”
   You will be required to login once with your Eventsential username and password.



Questions?

THANK YOU!