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CU I&E Submission: Automated POI Creation and Extension Process [1]

Submitted By

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Project Description

The Anschutz Medical Campus collaborates extensively with external researchers ("affiliates") on sponsored research. Currently, affiliates gain access to the InfoEd eRA system for managing compliance activities through a cumbersome process involving the manual creation of Person of Interest (POI) records in the HCM system. ERA Module Administrator Christa Bryan-Duffus handled the work. To set up each POI, Christa had to enter data on several pages in the HCM system. Christa and Kelly Fleming worked with HCM development to create a POI batch creation procedure that leverages CU Transfer and STAR (Secure File Transfer Protocol) to get the personnel data securely to UIS from Anschutz Medical campus and upload it into the HCM system as POIs. The new process enables Christa to securely create many POIs in a single run while minimizing human input. We also created a second procedure for the Extension of POIs, resulting in significant time savings.

Project Efficiency

The campus spent approximately 20 minutes creating/extending each POI in HCM. The process entails gathering personnel information, identifying employment history with CU, and

confirming that it is appropriate to create a POI in HCM. We also noted that the campus was manually deactivating POIs in HCM despite an existing monthly automated process that manages deactivations. Today, many POIs can be created simultaneously via a CSV upload to CU Transfer. Replacing manual steps with automation saved the Denver campus approximately four hundred hours this last fiscal year. These changes will continue to save hundreds of hours year after year.

Project Inspiration

Christa recently absorbed the work due to losing a full-time position on her team. Kelly was motivated by Christa's frustration as her workload was increasing. Kelly was also aware that HCM Development previously engineered an efficient POI creation procedure for Boulder. Kelly thought we could leverage something to enable Christa to create POIs in a more efficient batch manner to grant access to Affiliates and medical research personnel.

Future Plans

Currently, InfoEd is the only research administration system used by Affiliates that requires the creation of POIs. UIS is looking for opportunities to eliminate the POI process as a step for gaining access to InfoEd. We have the opportunity to be innovative and improve how access is given and verified, such as leveraging Master Data Management (MDM) and federated authentication to provide relief and also to eliminate security risks associated with expired POIs.

What Makes You Happiest about this Project?

Kelly is happiest that she and Christa conceived the idea and brought it to fruition. The collaborative nature of this effort demonstrates the value created across teams given the opportunity.
We also had fantastic support within UIS across multiple teams. Within UIS we worked collaboratively with Laura Abeyta, Laura Haller, Christine Bauder and Jordan Wight to develop a batch creation and extension process using a secure file transfer solution STAR and CU Transfer that is still saving Christa a ton of time providing her customers and improvement in service and allowing her to focus on more critical work.

Source URL:https://www.cu.edu/controller/i-e-awards/past-submissions/cu-ie-submission-automated-poi-creation-and-extension-process

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