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CU I&E Submission: Personalized Post Award Work Centers [1]

Team Information

Sridevi Bankupalli, sridevi.bankupalli@cu.edu [2], Assistant Director of Finance System Development
Milap Sharma, Milap.sharma@cu.edu [3], Assistant VP of IT Service Delivery

Who

Linda Warren (UIS)
Samantha Leann Fildish (UIS)
Bryce Oakes (UIS)
Ginger Acierno (AMC)
Margaux Johnson (AMC)
Julie Burger (AMC)
Stephanie Rosario (CU Boulder)
Melinda Hamilton (UCCS)

What

The Post Award WorkCenter enhances delivered PeopleSoft WorkCenter functionality to provide a one-stop experience to Post Award and Billing teams in Sponsored Project offices. It is personalized to reflect the workload and action items that are relevant to the logged in user . It shows customizable action Items, directly executable from the WorkCenter, for various tasks that are specific to a Grant Accountant. It organizes the flow of Billing activity into executable action items to provide a point in time view of billing, to help a Biller prioritize their work. The Exception section helps Post Award and Billing teams manage data and process irregularities. Other useful features include dashboard reporting and simplifying navigation via predefined links to key pages within the Finance and Grants system. The Personalized WorkCenter makes it easy for a user to quickly see their highest priority tasks and plan their work. This results in improved efficiency, accuracy, and timeliness of work. It has also served as a great tool for training new employees.

Why

Before introducing Post Award WorkCenter, all campuses used to navigate between multiple locations in Peoplesoft and shadow systems to process billing. They would need to run several queries to keep up with Post Award tasks that are due. Peoplesoft delivers a one-size-

fits-all Grants WorkCenter that is insufficient in addressing the goals of efficiency, timeliness and accuracy. By collaborating with campus partners, UIS designed Post Award WorkCenter to manage post award and billing activities in more efficient manner.

When

Post Award WorkCenter planning started in September of 2020(FY20 Q1) and we implemented the initial version in September of 2021(FY21 Q1). We are taking a phased approach and will continue to improve the WorkCenter by creating new capabilities for other Sponsored Projects teams like Award setup and Close Out teams, as well as adding more queries, revising links, and improving dashboard reporting. These phases are currently being planned out.

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Links
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