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CU I&E Submission: Sponsor Setup Automation [1]

Category

Finance & Accounting
Sponsored Projects/Research
Technology

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Project Description

The University of Colorado campuses receive grant funding from more than 500 sponsors every year. Adding these sponsors to the PeopleSoft Finance System was a highly manual and repetitive process. Sponsor Setup Automation greatly simplifies sponsor data entry. Collaborating with Campus InfoEd Module Administrators, the Research and Grants IT Services team developed this solution to improve the process. Key benefits include:

- Automated Data Entry – seamless data flow and setup.
- Automated Data Validation – Ensures accuracy and consistency.
- Error Reporting via Email – Instant notifications for quick resolution.
- Enhanced Reporting with IBM Cognos – New search and tracking tools for better management. This automation saves significant time, reducing manual effort and improving data integrity.

Project Efficiency

The Sponsor Setup Automation eliminates over 3 weeks of manual work annually by streamlining sponsor data entry. With 500 sponsors added each year, the previous process

required 15 minutes per entry, including searching for existing records. Automating this task saves valuable time, improves data accuracy, and enhances efficiency. Staff can now focus on higher-impact improvements in InfoEd and PeopleSoft, driving greater innovation and system enhancements.

Project Inspiration

The inspiration for this project came from the need to eliminate delays and errors in sponsor setup. Campuses waited 2–8 hours for manual sponsor entry for each sponsor after a ticket was submitted, slowing down financial transactions and impacting Sponsored Project Research. Data entry mistakes and misclassifications led to reporting issues and compromised data integrity. Automating this process ensured accuracy, reduced wait times, and freed up valuable time for staff to focus on more meaningful work, rather than repeating the same manual task each week.

What Makes You Happiest about this Project?

The greatest satisfaction comes from seeing how this automation has transformed efficiency and accuracy in sponsor setup. What once took hours of waiting and manual work is now instant and error-free, allowing financial transactions to proceed without delays. The reduced workload means staff can focus on strategic improvements instead of repetitive data entry. The positive feedback from everyone involved, who no longer experience frustrating delays, validates the project's impact. Knowing that this solution saves weeks of effort annually and improves data integrity makes this project truly rewarding.

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