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CU I&E Submission: Sponsored Project Routing Process Tool [1]

Who

Kathy Phillips was primarily responsible for the development of the tool. Sharon DeCarlo, Stephanie Rosario, and Greg Brown were also critical to the development and implementation of the tool.

What

A new routing process tool was developed. The tool is a Cognos report that summarizes the sponsored award information that is checked during the routing process. The report generates an Excel file populated with data stored in the Central Information Warehouse.

During FY 2017, the Grant Accountant team performed the routing process on more than 3,200 awards, exceeding $500 million in total. Using the tool, a Grant Accountant can now complete the routing process for an award in approximately 50% less time than it previously took. Assuming an average of 15 minutes to complete the routing process under the old process, the time it took to process the FY 2017 awards would have been reduced by approximately 400 person-hours if the new routing tool were used (3,200 awards x 15 minutes/award x 50% less time = 400 person-hours saved).

Therefore, the Grant Accountant team can now complete the routing process in a much more efficient manner, revenue will be recognized more quickly, and, because of improved operational efficiencies, the team can process significantly more awards.

Why

Revenue recognition of an award will only begin after the routing process is completed. Therefore, it is important that the Grant Accountant team has the ability to complete the routing process as efficiently as possible in order for revenue to begin being recognized. Prior to the implementation of the new routing tool, Grant Accountants spent a significant amount of time navigating among numerous PeopleSoft screens in order to validate the sponsored award information input in PeopleSoft. The time it took to navigate among the numerous screens added no value to the routing process or the overall sponsored project process.

Where

The new routing process tool has been implemented on the Boulder Campus, and it is currently being used by the Grant Accountant team. There are plans to make the new routing

tool available to groups who do the routing process on the Anschutz Medical, Denver, and UCCS Campuses. In addition, as a result of the work done to improve the routing process, work is currently under way to make the sponsored award set-up process more efficient and effective for all campuses.

When

The new routing tool was implemented on February 12, 2018 on the Boulder Campus, and the Grant Accountant team began using it that day. The tool will soon be available on the Anschutz Medical, Denver, and UCCS Campuses.

Submitter's Information

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Source URL:https://www.cu.edu/controller/i-e-awards/past-submissions/cu-ie-submission-sponsored-project-routing-process-tool

Links
[1] https://www.cu.edu/controller/i-e-awards/past-submissions/cu-ie-submission-sponsored-project-routing-process-tool [2] mailto:greg.m.brown@colorado.edu