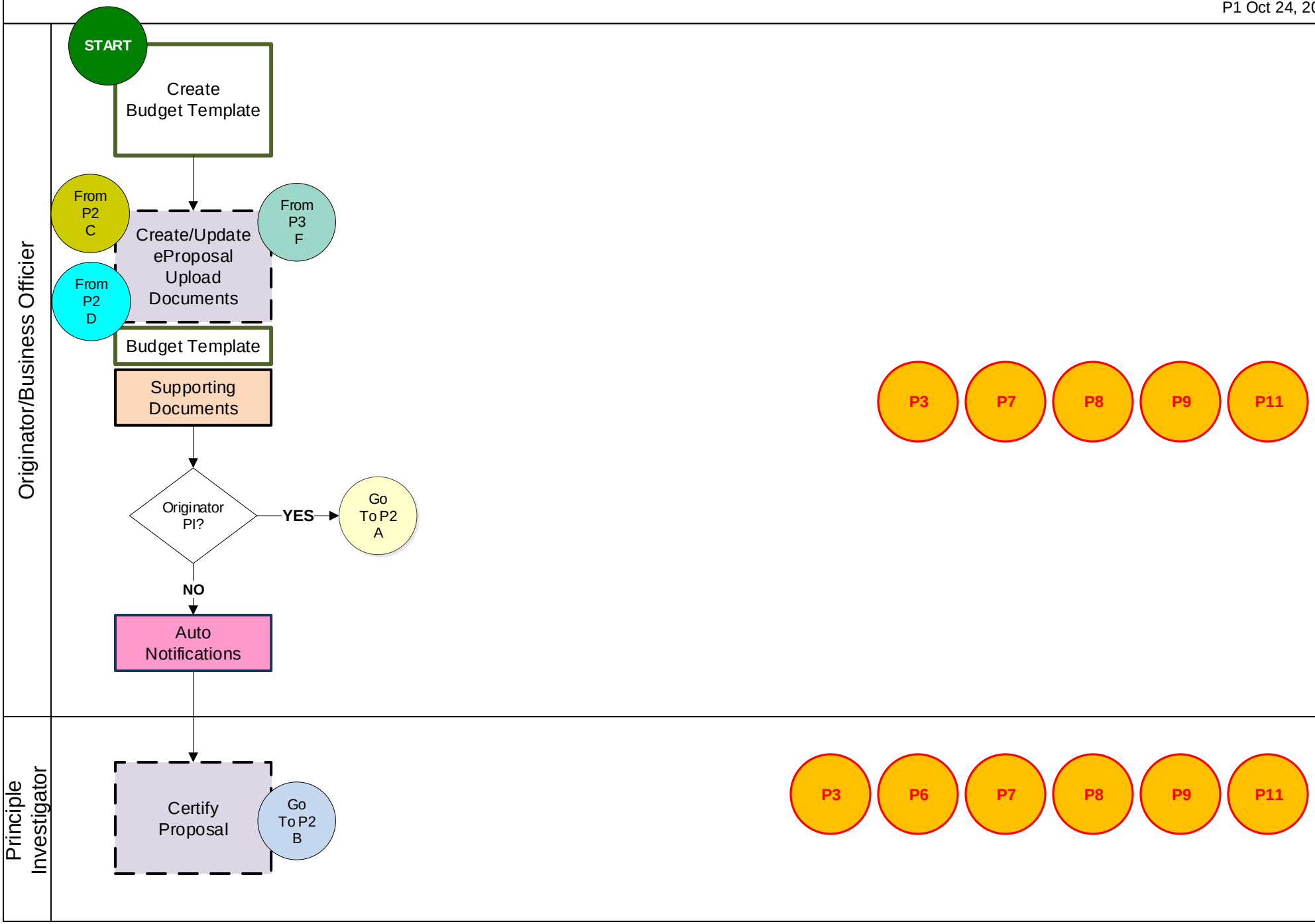
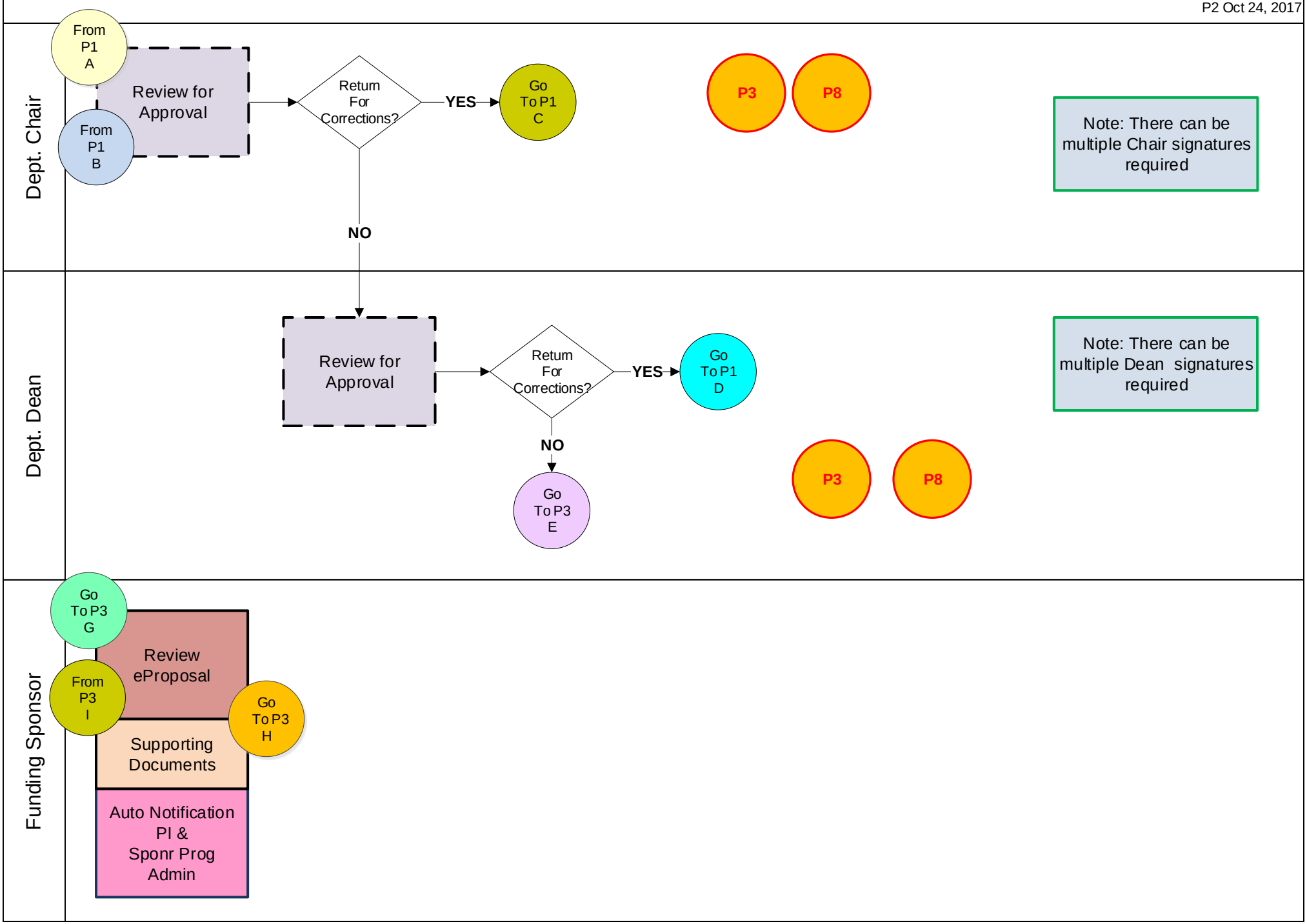
Cayuse - Sponsor Projects Administration – 'AS IS'

P1 Oct 24, 2017



Cayuse - Sponsor Projects Administration – 'AS IS'

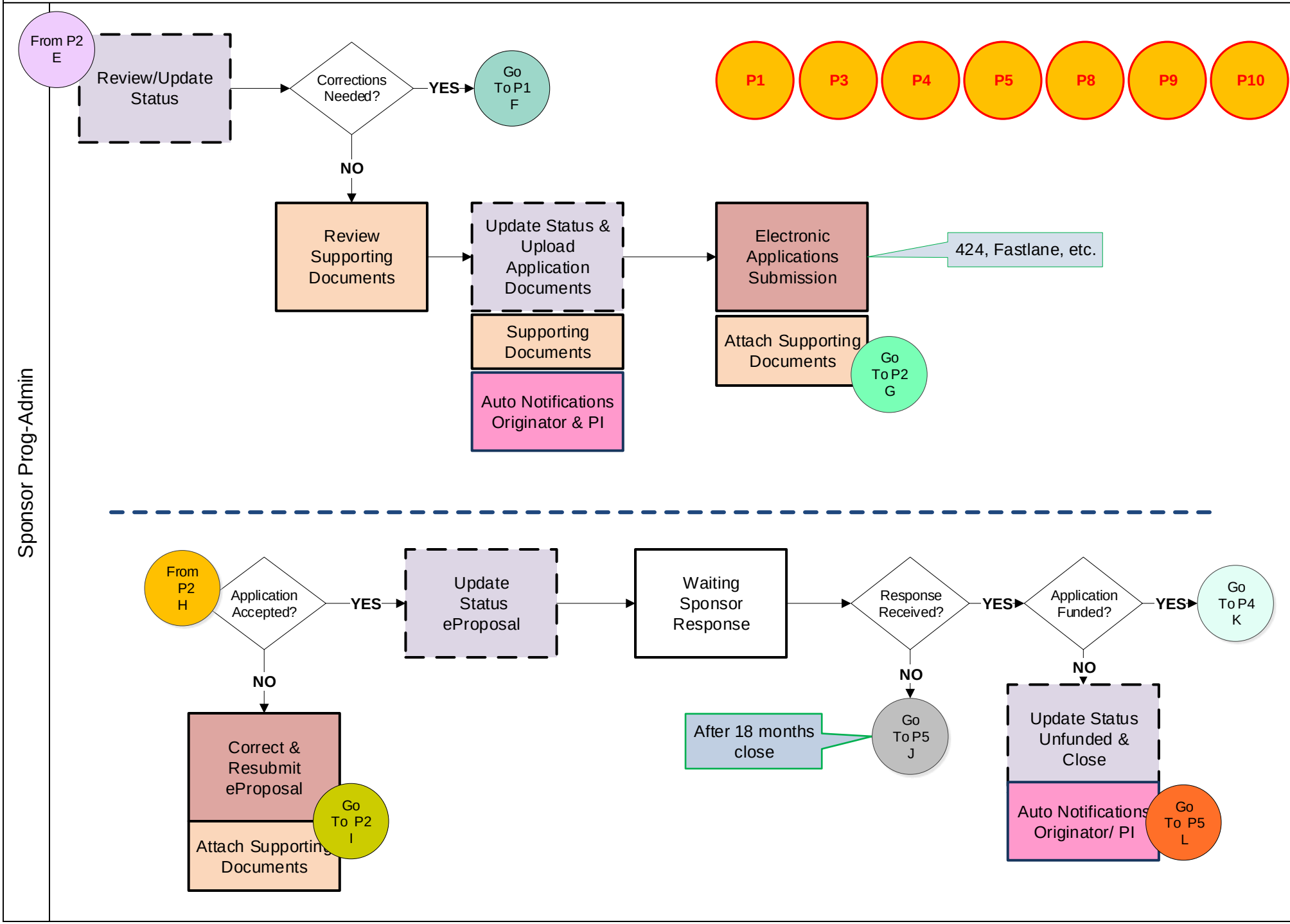
P2 Oct 24, 2017



Cayuse - Sponsor Projects Administration – 'AS IS'

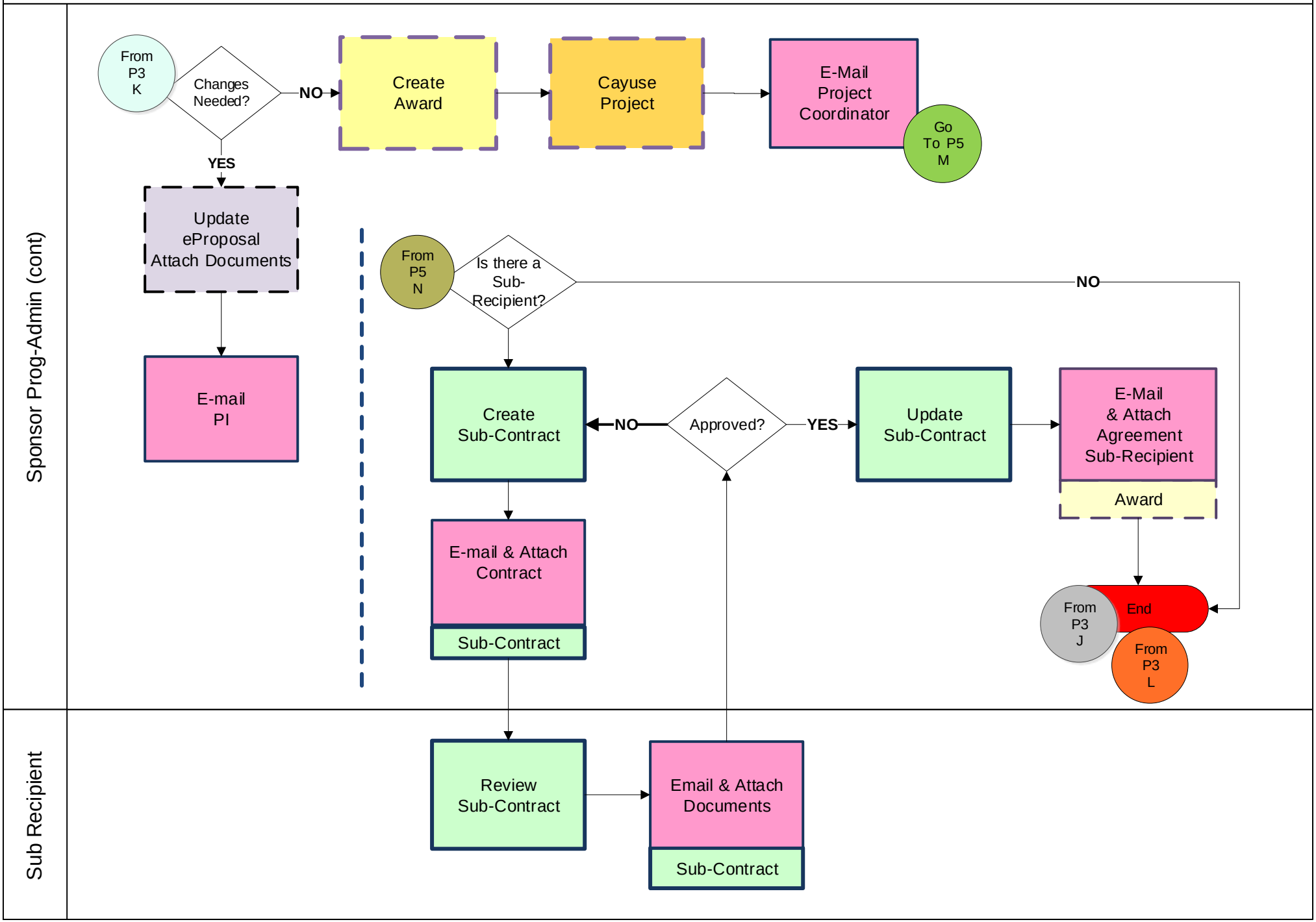
P3 Oct 24, 2017

Sponsor Prog-Admin



Cayuse - Sponsor Projects Administration – 'AS IS'

P4 Oct 24, 2017



Cayuse - Sponsor Projects Administration – 'AS IS'

P5 Oct 24, 2017

Project Coordinator/Admin

From P4 M

Review Award & Proposal Update Proposal with Award ID

Run Process Create FRAPROP Record from Cayuse

Make Updates to FRAPROP Record

Create Screen Shot

Remove External ID from Award Record

Remove ID in order that the Banner Process to create FRAPROP record from Cayuse will be skipped

Attach FRAPROP Screen Shot

E-Mail Grants Acctng., Primary Admin FRAPROP Created

Add to email the PI, Title, Award #, Type

P1 P2 P3 P5 P8

Grants Accounting

Review Award

Update FI FRAGRNT (Index created)

E-Mail PI / Bus Officer/ Sponsor-Prog Admin, Project Coordinator

Update HR

Rpts

Review Daily

P1 P3 P5 P8 P9 P10

Create Manual Billing

Go Pg4 N

Pains & Issues:
The issues and pain points identified during the AS IS Process Mapping and Analysis workshop are noted below. The issue is numbered and its Root Cause Analysis is in red text, preceded by RCA prefix.

1. Cayuse script to create Banner FRAPROP record from Cayuse was modified during implementation.
RCA: Base line script to create FRAPROP with Cayuse data was modified to combine proposal and award data to populate FRAPROP.

2. Duplication of effort updating Banner FRAPROP after record created from Cayuse.
RCA: Script to create FRAPROP missing key data fields, e.g. org code.

3. Departmental reports needed and distributed electronically.
RCA: Reports comparing Cayuse and Banneer have not been created.

4. Cayuse allows proposal to be submitted without PI certification.
RCA: Software needs to be updated to make field required.

6 Sometimes email message is not clearly understood by the receiver.
RCA: Acronyms used are not defined or instructions are not understood.

7. Training for departmental users needed.
RCA: Training is not periodically scheduled for campus users.

8. Index numbers are not available in Cayuse.
RCA: Currently we are unaware if this can be stored in Cayuse.

9. Email communications sometime are not delivered to all essential staff members.
RCA: They are not always identified on the proposal record group.

10. Currently not using Cayuse to create the Banner FRAGRNT record.
RCA: Implementation team decided to use manual process to generate the FRAGRNT record.

11. PI/ Business Officer is not notified when award is created.
RCA: Cayuse does not require 'Primary Admin' field to be updated.

Analysis of the 'AS IS' process

1. Are all roles essential? What roles could be considered to be eliminate? No – eliminate the Project Coordinator role

2. What is the number of hand-offs? 0- Cayuse is an electronic system

3. Are any steps/process automated? Some of the notifications, routing, approvals are systematic

4. What steps can be eliminated? Manual data entry of FRAPROP and FRAGRNT Banner forms, manual emails

5. What steps could be automated? Creating the proposal and grant award form, more of the email communications

6. What tasks consume the greatest amount of time? Originator/PI submissions and the Sponsor Admin managing role

7. Does each task add value? Yes

8. What steps/processes should be added? New reports for departmental users with automated distribution. Create Shared Drive where forms and information can be shared between College Reps, Scholarship and Grants offices

9. Iterations (how many times is process repeated in a timeframe)? Daily

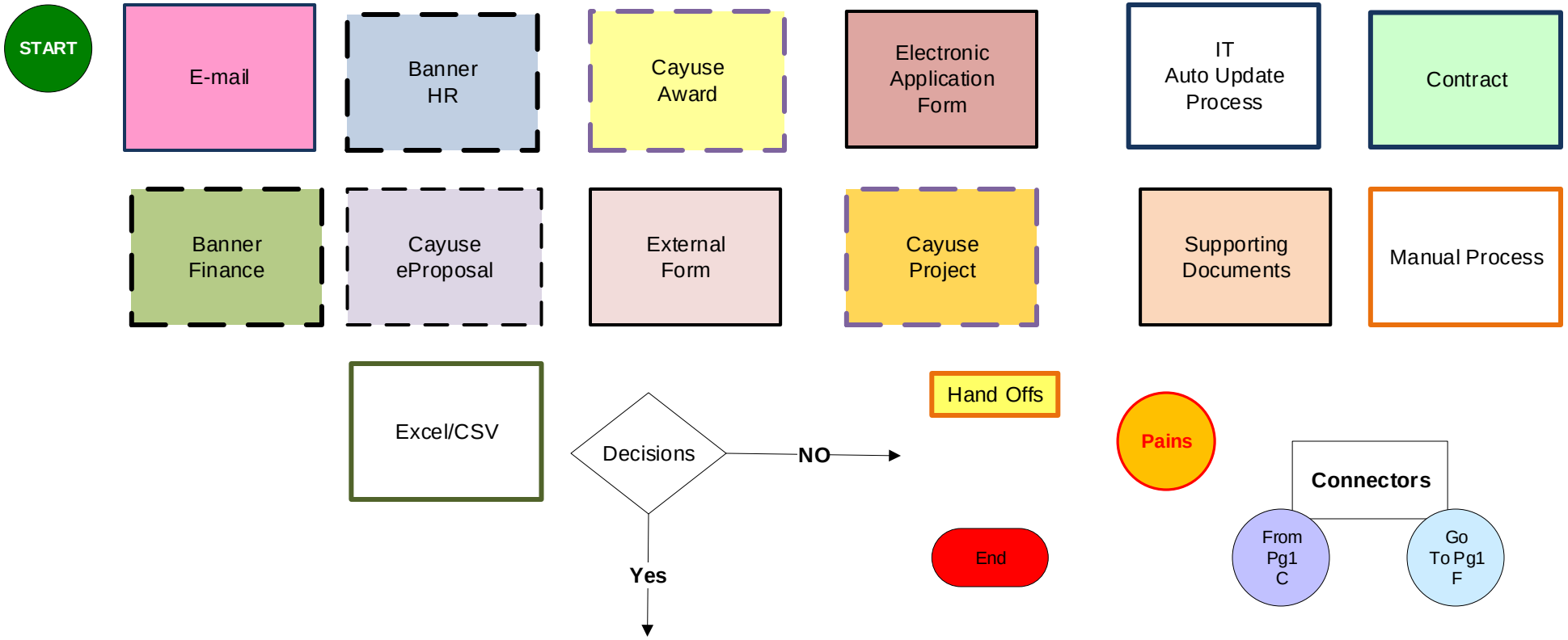
10. Percentage of errors (forms returned, corrected, contacted person for corrections, etc.) 50%

11. % FTE and/or estimate time takes for each key role in the process. PI/ Originator=50%, Sponsor Admin=80%, Project Coordinator= 20%, Grants Accounting=25%

12. Metrics – identify measurable outcomes (time, manual steps, paper, manual communications, unnecessary reviews & approvals). Identify current time spent on task for roles: Based on 500 submissions yearly * 7 hours = 3,500 hours

Originator = 1 hour
Sponsor Admin = 3 hours
Grants Accounting = 2 hour
Project Coordinator = 1 hour

Legends



Penultimate Semester: Contact faculty advisor for names of honors students

Rejected contracts may go to either rep for re-processing

Text Box

Consider for Phase 2 implementation - Put on hold if waiting on Confirmation of final semester enrollment

Note: On revisions some departments do not send form back to faculty for signature

text

Text box

Text Box