

SESSION #10918

Making a Molehill out of a Mountain: Automating OUHSC's Grants Pre-Award Process

Hello!

Lynette Chaudoin

Solution Architect

Gideon Taylor

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University of Oklahoma

The University of Oklahoma is the state's flagship university. OU is a major, public Research university that gives students the feel of a private college atmosphere.



\$416.6M RESEARCH EXPENDITURES.



Designated by the Carnegie Foundation as a Highest Research Activity institution, placing it in the highest tier of comprehensive research universities in the nation.



Three campuses in Norman, Oklahoma City and Tulsa.

OU Health Sciences Center



762

FY22 Sponsored Awards



\$179.3

Million in Sponsored Award funding in FY22



\$134.6

Million dollars in Expenditures in FY21

Centers of Excellence

The University of Oklahoma Health Sciences Center is a comprehensive academic health center with several strategic research centers and institutes that support advanced research across many different disciplines including cancer, diabetes, obesity, ophthalmology, geroscience, and microbial pathogenesis.



OU Health Stephenson Cancer Center



OU Health Harold Hamm Diabetes Center



Oklahoma Center for Geroscience



Oklahoma Center for Microbial Pathogenesis



Dean McGee Eye Institute



Oklahoma Children's Hospital OU Health



Oklahoma Clinical and Translational Science Institute

GT eForms™ - Validated PeopleSoft
Automation Solution

PeopleSoft Project Services

AI Digital Assistants

Process Optimization Analysis

PeopleSoft 'Keep Current'
Services

Full-Stack Cloud Managed Services

Automation Centers of Excellence

Integrated / Automated Testing – PeopleSoft
and Beyond

Robotic Process Automation



Giving Your Enterprise a Voice

Delivering on the Promise of Enterprise Technology

Gideon Taylor enables clients to envision and create custom solutions for eForms and workflow technology, OCI cloud hosting, UiPath RPA, always-current managed services, full-service consulting and staffing, WebUX and conversational AI.

Founded in 2001, based in American Fork, UT

Gideon Taylor is a PeopleSoft custom solutions provider for business, education, and government organizations.

ORACLE

Partner

UiPath™ Partner
SILVER



Transforming and Extending the Peoplesoft Experience

ORACLE
Validated Integration
PeopleSoft



BYU-Hawaii

Cloud Migration & Hosting

Key Achievements:

- Moved all PS databases to OCI
- Increased response time
- GT now remotely manages all patching, PS updates, etc.



Seneca College

Ida Enterprise Chatbots

Key Achievements:

- 259,000+ questions answered during last 12 months
- 93.99% ACCURACY. Average confidence the AI has the right answer for the user's questions
- Almost 50% of questions answered outside of business hours



State of Tennessee

GT eForms™

Key Achievements

- Using eForms, performing all personnel actions for more than 45,000 employees across multiple agencies
- Disbursing centralized invoices to applicable State agencies via eForms
- eForms enabled over 250,000 retirees to enroll in benefits programs each year



Brigham Young University

Managed Services

Key Achievements:

- Enabled client to reallocate 12 FTEs to new projects
- GT assigned six team members to manage all PeopleSoft processes, upgrades, etc.
- Created and administered innovative ticketing system to proactively manage client needs.

The Past

History

For more than 10 years, the University of Oklahoma's Health Sciences Center used a third-party application to manage the complexities of its grants pre-award process.

Dollars

Annual licensing Fees = \$180,000

Annual Maintenance = \$40,000 - \$90,000

Interaction Poll

**What are your
top issues with
tracking pre-
award
proposals?**



The issues...

- User Interface was not intuitive.
- Information was scattered.
- Limited visibility for casual users.
- Broken features.
- Limited access to data and reporting.
- Changes/updates, nope.

And more...

- No Peoplesoft Integration.
- System access was not standardized.
- Printed documents galore.
- Forms in forms in forms, and yeah... paper forms.
- What is the status?
- \$\$\$\$\$

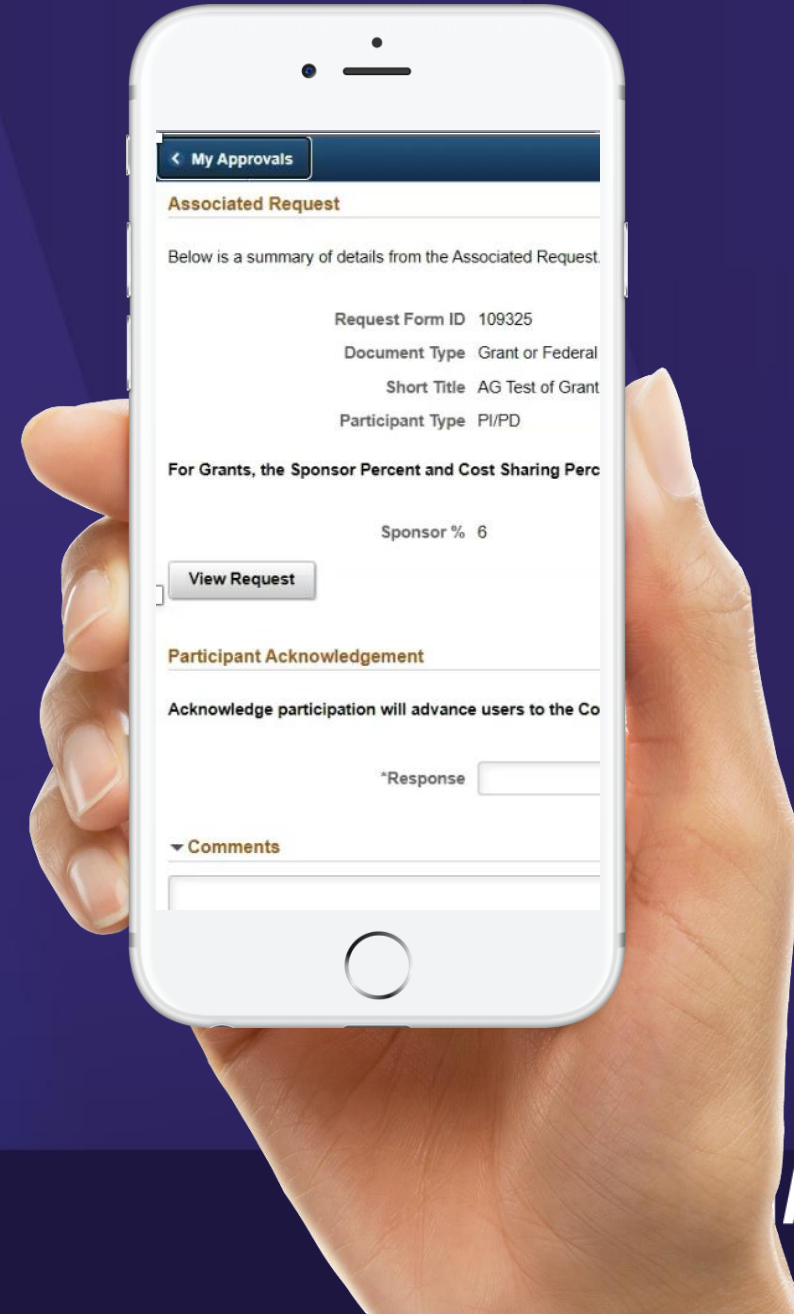
Key Requirements



- Intuitive data collection
- Send, receive, and log email communications
- Reporting!
- Integrate with Peoplesoft Maintain Proposals (V101, V102)
- Accessible Attachments
- External Participants
- User Security

Interaction Poll

What are you currently using to track proposal requests?



Buckle Up!!!

What “forms” are included?

Request Form

This is used to collect all of the details of the proposal process. Conditionally hiding and showing to walk the user through the process.

Compliance Form

PIs and all Key Participants can easily complete the Compliance Form.

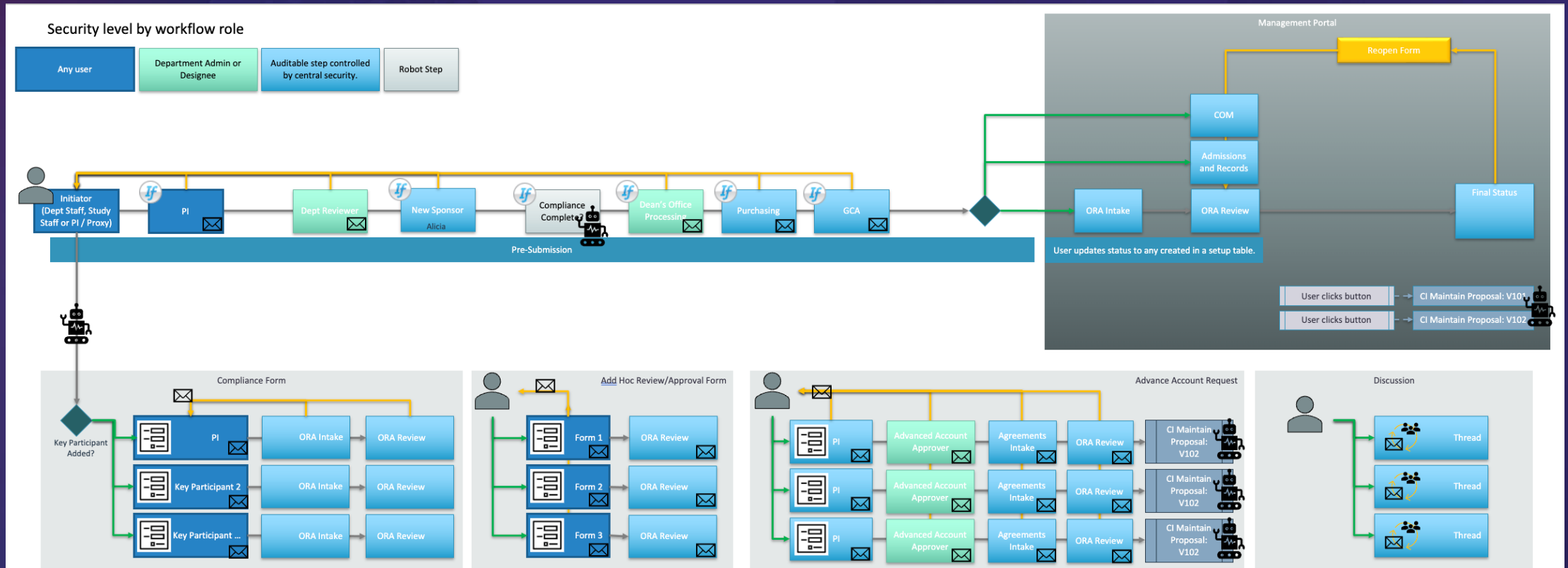
Advanced Account Request

Early creation requests to create accounts.

Review Request

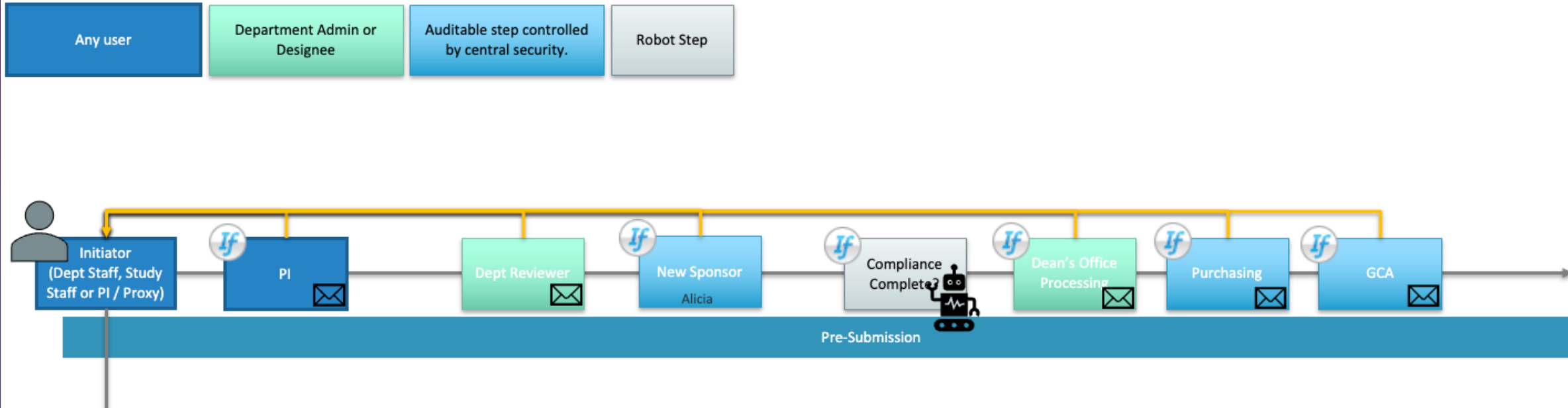
Legal review, Ancillary Review, Internal Comments, External Review, Request for Information...

To Summarize



Request Form

Security level by workflow role



PeopleSoft Homepage and Tiles

SoonerTrack

Instructions

Welcome to SoonerTrack II, gavr0002!

Thank you for participating in SoonerTrack II User Acceptance Testing (UAT). Your views and comments on this new system will be extremely helpful in assisting its further development. The SoonerTrack II test environment will be available from 4/18/2022 to 5/27/2022. Please access the test environment during this time, begin testing, and report any defects encountered.

What you need to do:


Test scripts can be found [here](#). Please follow the steps outlined in the test scripts and record the results of the test. Use your *last name* at the beginning of the Title of every Request Form you create. A "Testing Strategies" Checklist has also been provided as a guide for some of the tasks you may need to complete in the new system. Note that this is not an exhaustive list. Please think about all of your own business processes, reports, etc. Test everything you possibly can!

Reporting issues:

If you are unsure whether an issue should be reported, please reach out via the UAT Teams for advice. Choose a QA category from the list in Teams that best describes your question/issue and search to see if it has already been reported in Jira. If you didn't find the question/issue in the channel, please field it using the template provided. If it was decided that the issue should be reported in Jira, please log into Jira to do so.


Accessing Jira/Atlassian System to report an issue:

Create a New Request




3771

Approvals




3771

Manage Requests




6

Additional Forms




6

Compliance & Participation



133

Discussions




6 Unread Discussions

Email Administration

9

Number of in error messages assigned to you

Org User Setup





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6 Unread Discussions

Email Administration

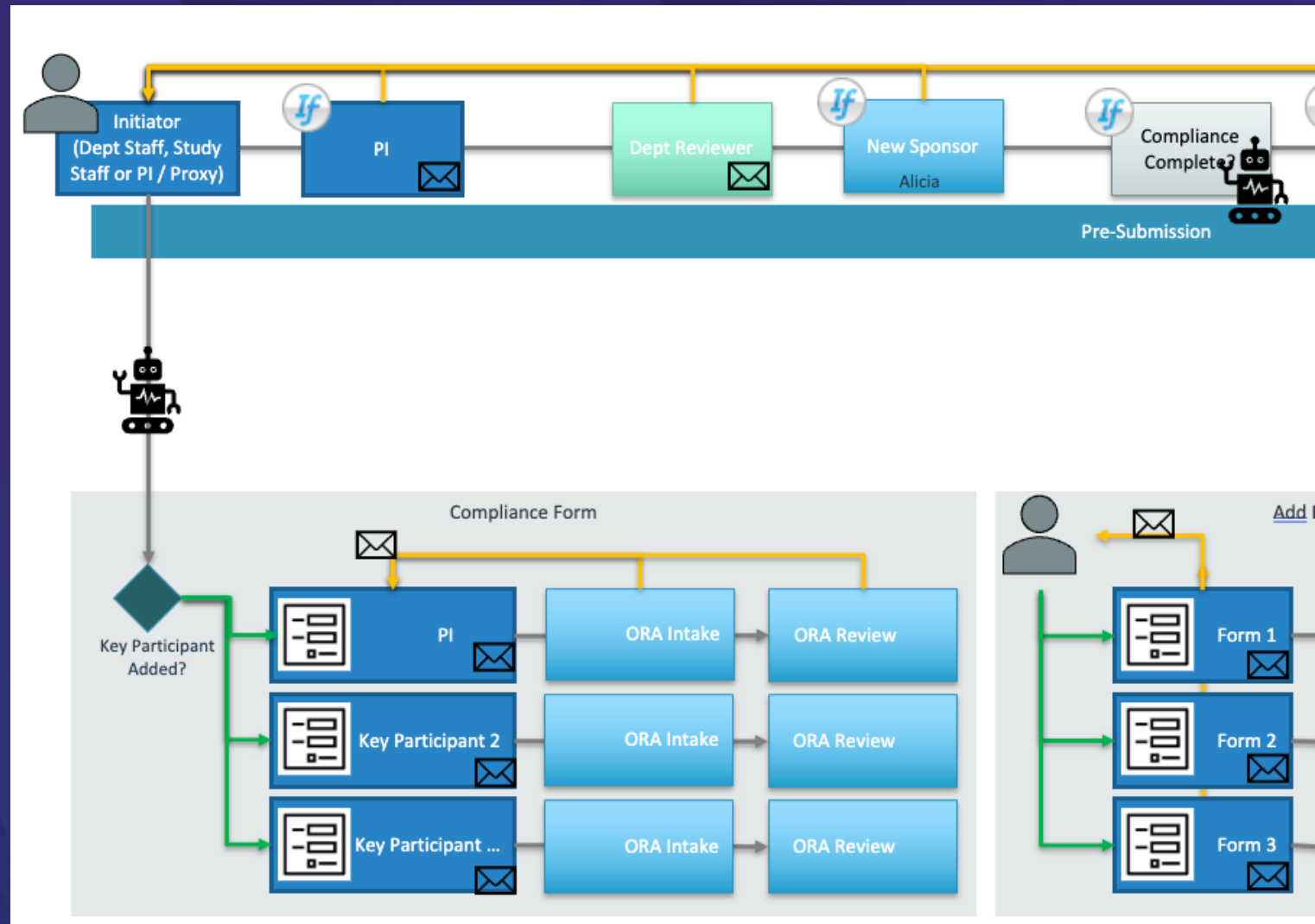
9

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Compliance Form



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IGT

Compliance & Participation



IGT

14

Additional Forms



IGT

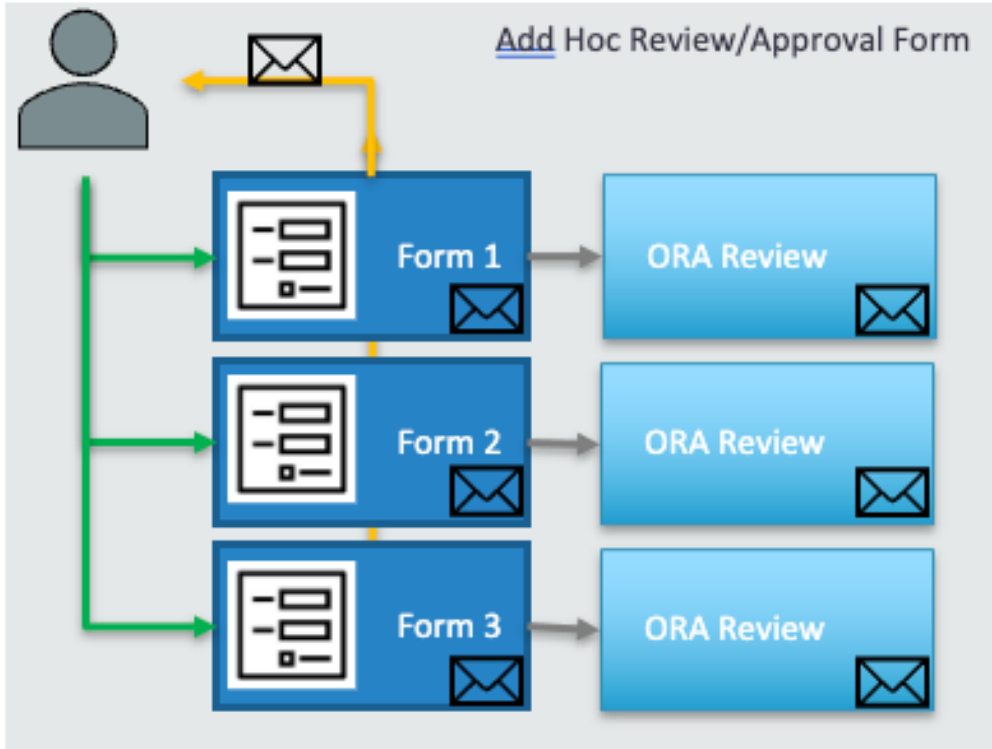
6

Discussions



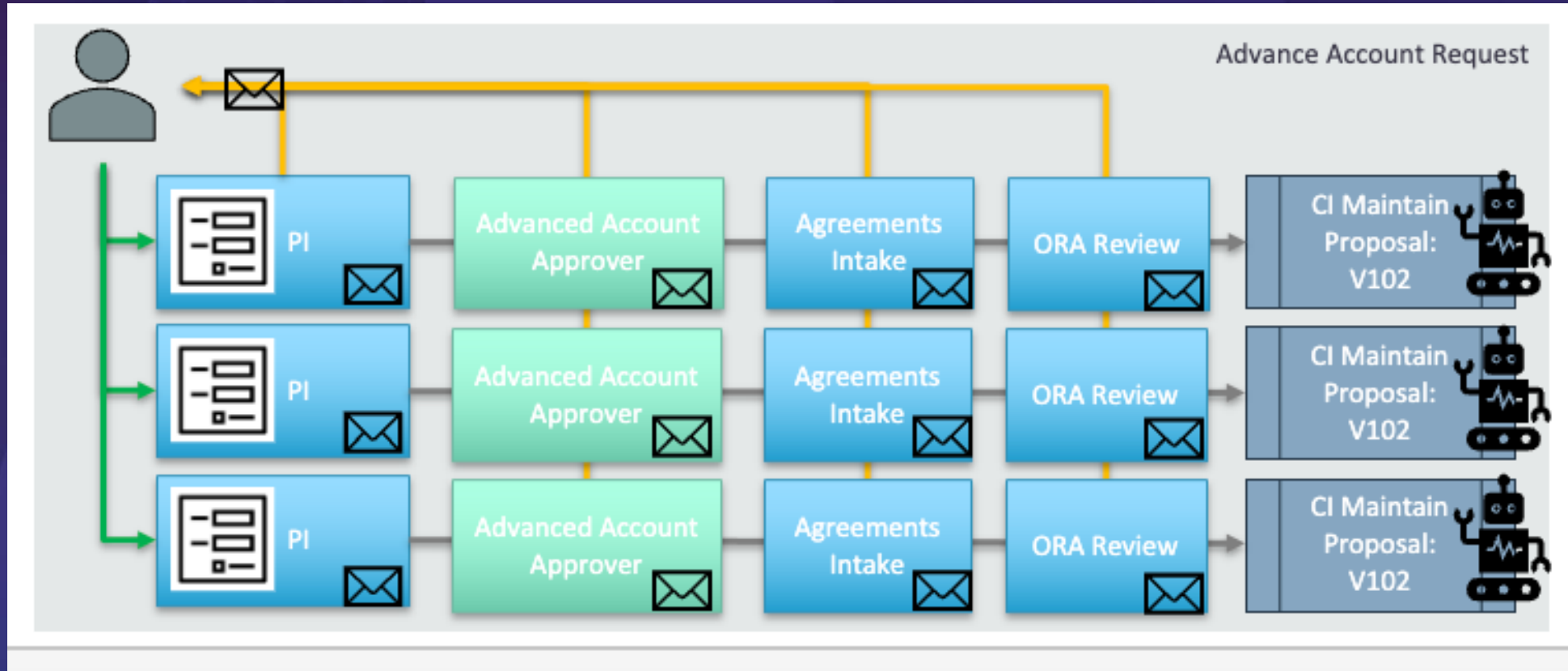
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Request Review and External Participation

Advanced Account Request



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IGT

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6 Unread Discussions

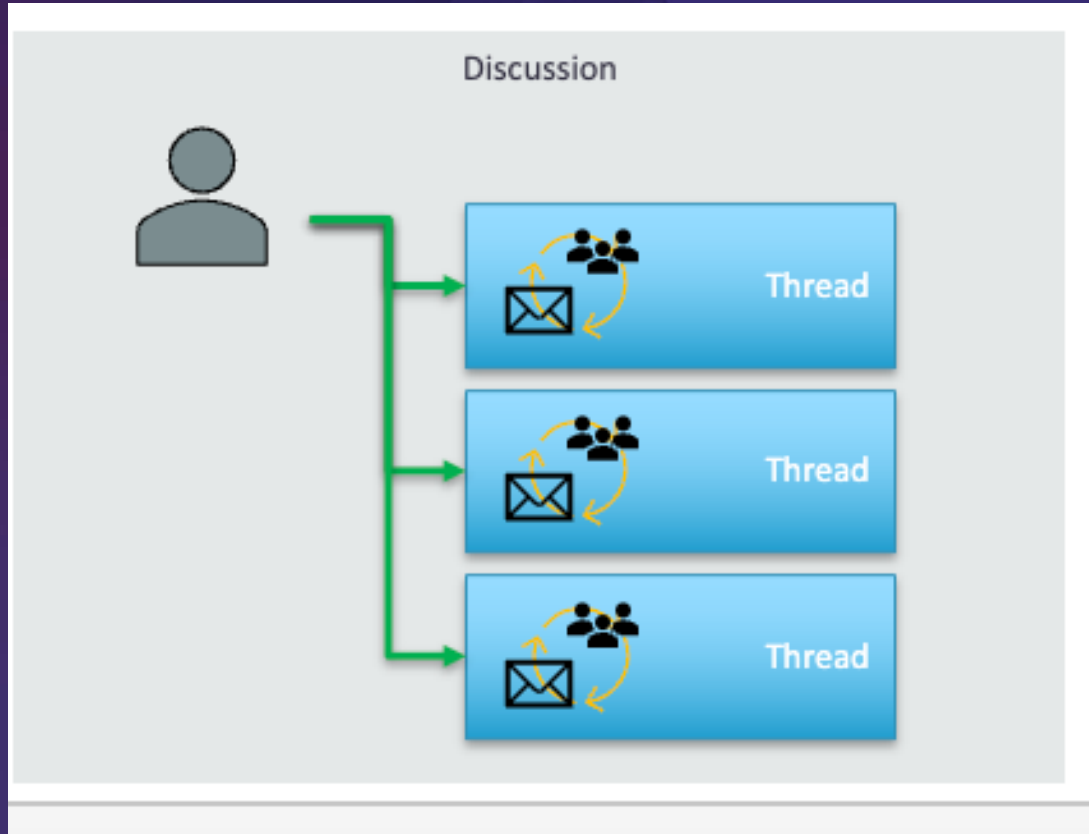
Email Administration

9

Number of in error messages assigned to you

Org User Setup





Comments and Emails

SoonerTrack Home | Search | Settings | Help

AG Test of Grant Document type

Request ID 109325

Status Routing for Approvals

Navigation Menu

- Request Form
- Additional Forms
- Compliance Admin
- Attachments
- Department Setup Table
- Form Admin Tool
- History Log

Update a Request : SoonerTrack Request Details Form ID 109325

Overview

Awarded No

Status

Next Review Date

Owner

Current Workflow Step PI Review

Proposal ID

Assigned To SPA

Status Details

| 1 row | Status Detail | Start Date/Time | Status Complete? | Complete Date/Time |
|-------|----------------------|-----------------|--------------------------|--------------------|
| 1 | <input type="text"/> | | <input type="radio"/> No | + - |


Requestor Information

Information below prepopulates as read only, based on the user who began this request form.

Created By Beckmann, Gary M
Created On 07/01/2022


Related Information

General




0 Unread Discussions

Ancillary



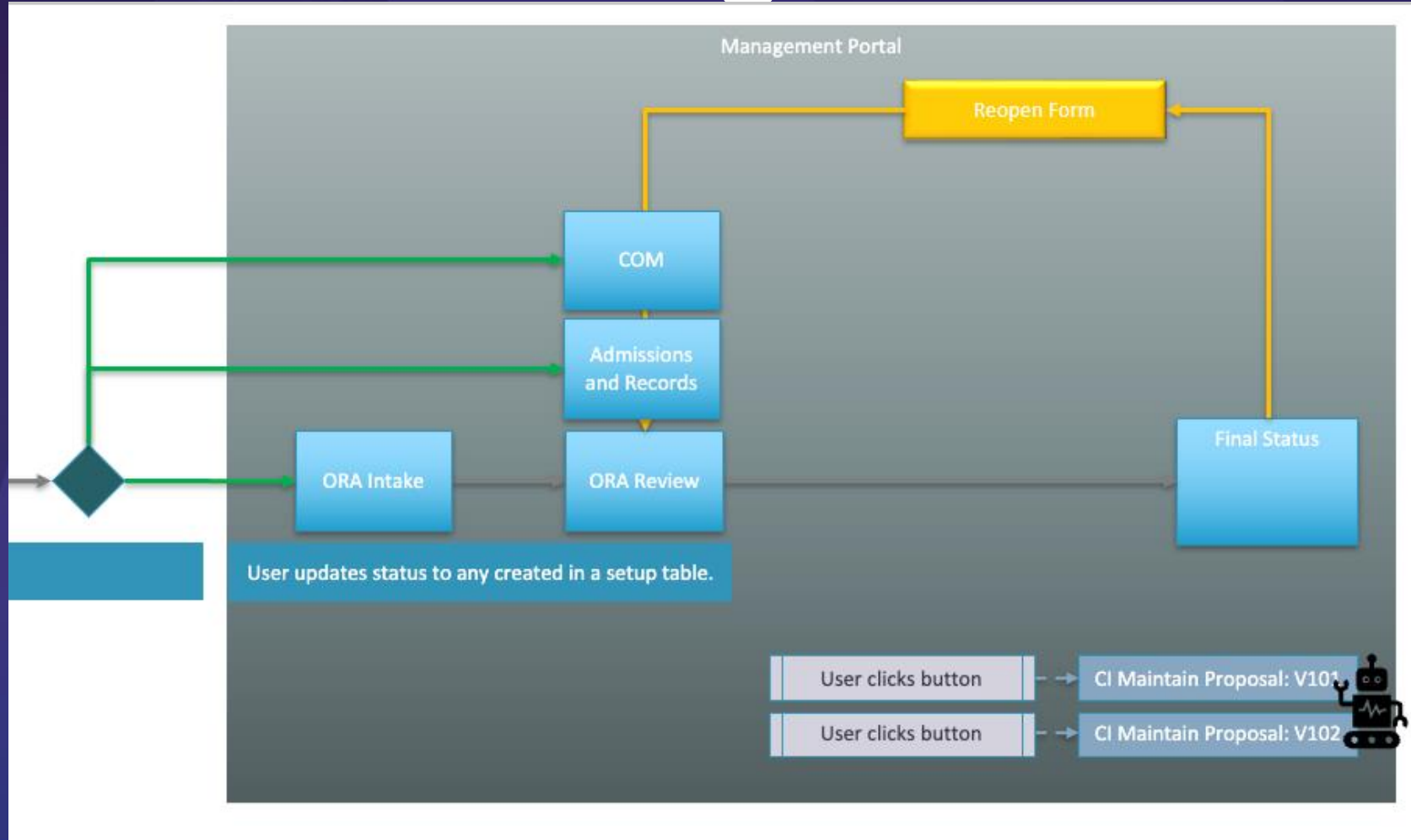
0 Unread Discussions

ORA Only



0 Unread Discussions

Final Processing



User Defined Search

SoonerTrack Dashboard

Search Criteria

Saved Search

Personalize Search

Form ID Begins With

Proposal ID Begins With

Document Type is Equal To

Status is Equal To

Project Full Title Begins With

Financially Responsible Department is Equal To

Short Title Begins With

Assigned To SPA Begins With

Current Workflow Step Begins With

Last Modified is Not Less Than

PI/PPD Name Begins With

Created On Date is Equal To

Status Detail Contains

Related Request Pending Additional Forms No

Search Clear Save Search

My Recent Searches

Search Results

Personalize Search

Results Fields

| | | | |
|------------------------|-----|--------------------------|-----|
| Form ID | Yes | Related Request | No |
| Proposal ID | Yes | Short Title | No |
| Document Type | No | Assigned to SPA | Yes |
| Status | No | Current Workflow Step | Yes |
| Project Full Title | Yes | PI Name | Yes |
| Fin Responsible Dept | No | Last Modified | Yes |
| Expected Start Date | No | Created By | No |
| Expected End Date | No | Created On Date | Yes |
| Reference Award Number | No | Next Review Date | No |
| Sponsor ID/Name | No | Owner | No |
| Orig Sponsor ID/Name | No | IRB Number | No |
| Project ID | No | Status Detail | No |
| Req IDC Rate Exception | No | Pending Compliance Forms | No |
| Status Grouping | No | Pending Additional Forms | No |
| Document Type Grouping | No | Unread Discussions | No |
| | | Qualified for | No |

Save Search

Search Criteria

My Recent Searches

Search Again

Today - 2:13 PM
Project Full Title Begins With ag Financially Responsible Department is Equal To MED00700 Document Type is Equal To Grant or Federal Clinical Trial

Search Again

Yesterday - 4:07 PM
Project Full Title Begins With ag

Search Again

Yesterday - 11:06 AM
Proposal ID Begins With 20192304

Search Again

Yesterday - 9:28 AM
Project Full Title Begins With a Document Type is Equal To Grant or Federal Clinical Trial Status is Equal To Internal Review

Search Again

Yesterday - 9:27 AM

Link, Copy, and Amend

The screenshot shows the SoonerTrack Dashboard interface. At the top, there is a navigation bar with 'SoonerTrack' on the left and 'Dashboard' in the center. On the right side of the navigation bar are icons for home, a menu, and a search function. Below the navigation bar, there are sections for 'Search Criteria', 'My Recent Searches', and 'Search Results'. The 'Search Results' section is expanded, showing a table with 3 rows. An 'Actions' menu is overlaid on the first row of the table, with 'Open Request' highlighted by a yellow circle and a mouse cursor. The table columns are: Form ID, Proposal ID, PI Name, Current Workflow Step, Assigned to SPA, Created On, and Last Modified.

| Form ID | Proposal ID | PI Name | Current Workflow Step | Assigned to SPA | Created On | Last Modified |
|----------|-------------------------------------|------------------|-----------------------|-----------------|------------|---------------|
| 1 109320 | ADMISSIONS AND RECORDS/LISA MERRELL | Keesee,Linda Lee | Executed | | 06/30/2022 | 07/01/2022 |
| 2 109325 | document type | Meder,Paula A | PI Review | | 07/01/2022 | 07/01/2022 |
| 3 109332 | AG Test Oth Svc | Meder,Paula A | PI Review | | 07/01/2022 | 07/01/2022 |

Packet Navigation

The screenshot displays the SoonerTrack web application interface. At the top, there is a dark blue header with the text "SoonerTrack" and several navigation icons (home, flag, list, refresh). Below the header, the main content area is split into two sections. On the left is a sidebar with a "Navigation Menu" containing the following items: "Request Form", "Additional Forms", "Compliance Admin", "Attachments", "Department Setup Table", "Form Admin Tool", and "History Log". The "History Log" item is highlighted in yellow and has a mouse cursor pointing to it. On the right is the main content area, which is currently blank and contains the text "Use the side bar to review the components of your Request Form".

What is Delivered PeopleSoft?

- Security
- Navigation
- Homepages
- Tiles
- Activity Guide
- Search Features
- Related Actions
- Discussions
- Guest Access
- Maintain Proposals
- Query
- BI Publisher
- Attachments

The Result

6226

Requests submitted in the last 1.5 years

75%

Decrease in submission time.

The Challenges



- High Tensions
- New/Changing Staff
- Endless Grant Deadlines
- Data Conversion

The Good

Training



Participation



Change Management



Post-Award deserves love too

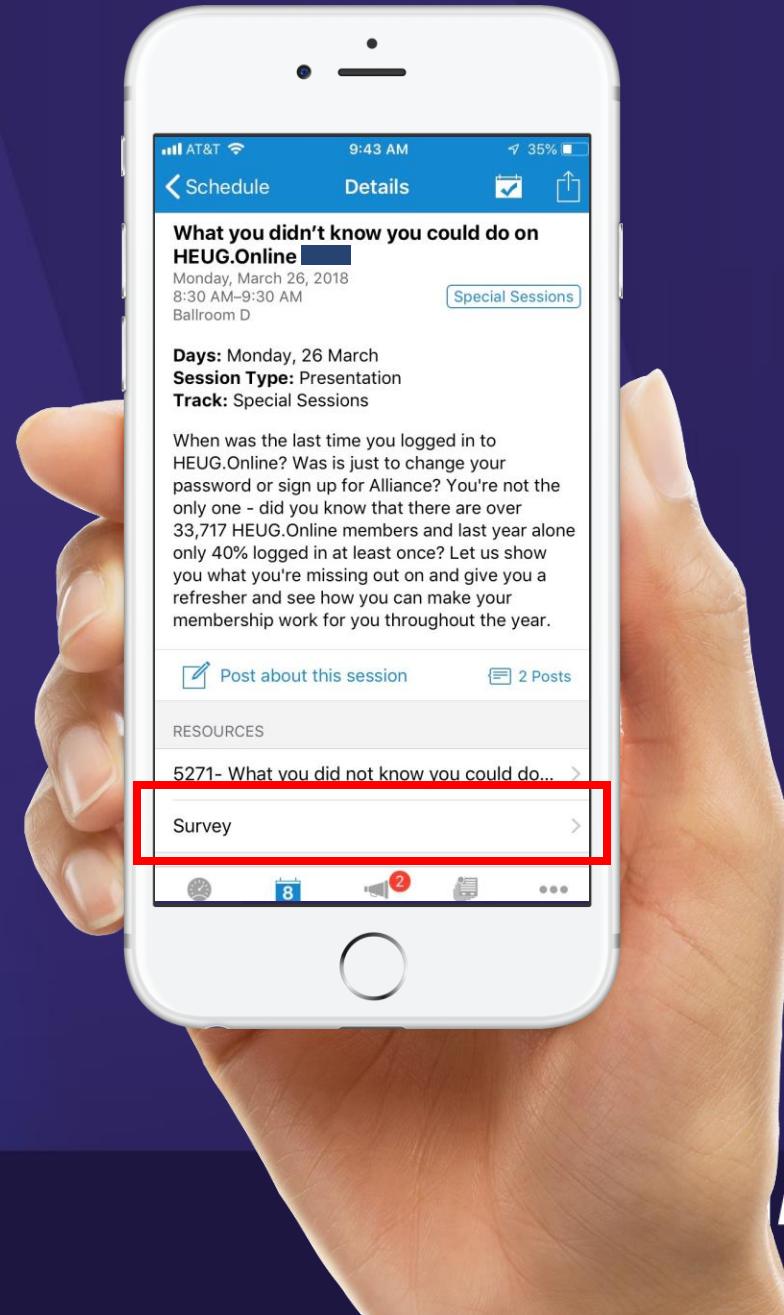
- Update overall budget of year 1, year 2, year 3....
- Update start date
- End date
- Direct amount
- Indirect amount

Big Wins

- All forms, attachments, discussions, etc is all accessible in one easy view
- Configuration-based
- Peoplesoft development
- Reporting tools
- ~~Dual entry~~
- ~~Data entry errors~~
- Quiet Help Desk
- Licensing fees = \$0

Session Surveys

1. Open the HEUG Events App on your phone, tablet, or laptop
2. Click on this session in your schedule
3. Then click the “Resources” button and “Survey”
You will be required to login once with your Eventsential username and password.



Questions?

THANK YOU!

This presentation and all Alliance 2024 presentations will be available for download from the conference site at: www.alliance-conference.com

