FINANCIALS IN THE CLOUD – GRANTS & STREAMLYNE

TOWNHALL

The presentation will begin soon.
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PRESENTATION OVERVIEW

- **Streamlyne**
  - Overview
  - Benefits
  - What will change & what will stay the same
  - Sneak peek

- **FITC – Grants**
  - Overview
  - Benefits
  - What will change & what will stay the same
  - Reporting
Financial Systems Transformation (FST) Project:

**Core Transactional Systems**
- Planning and Budgeting Cloud Services (PBCS)
  - Budget preparation
  - Scenario planning for non-grant funds
- Streamlyne
  - Proposal preparation & tracking
  - S2S proposal submission
- Financials in the Cloud (FITC)
  - AR/Billing
  - Payments
  - Budget transfers
  - Requisitions/POs
  - Sponsored Projects- “Grants”
- Concur
  - P-Card reconciliation
  - Travel authorizations
  - Travel expense reimbursements
- Reporting Systems
  - Business Intelligence Tools
  - Scenario planning and forecasts
  - Grant & non-grant budget status
  - Salary forecasting of active positions at the position level
Core Transactional Systems

Planning and Budgeting Cloud Services (PBCS)
Streamlyne
Financials in the Cloud (FITC)
Concur

Reporting Systems
Business Intelligence Tools

What it replaces

NIBS, UBUD & BPC
Cayuse 424
PeopleSoft FSKU & KUPPs
PeopleSoft FSKU
BudCast & DEMIS Financials
SYSTEMS OVERVIEW

Modules:

Planning and Budgeting Cloud Services (PBCS)
- PBCS Planning
- PBCS Management

Streamlyne
- Proposal Preparation and Routing
- Proposal Submission
- Sponsored Contract Negotiation

Financials in the Cloud (FITC)
- Departmental Accounts Receivable and Billing (DARBI)
- Procure to Pay (P2P)
- Assets
- Grants
- General Ledger (GL)

Concur
- Expense

Business Intelligence Tools
- Oracle Analytics Cloud (OAC)
- Oracle Essbase Cloud Services (ECS)
Streamlyne

- **What it is?** Hosted pre-award system that assists with pre-award budget development, proposal approval routing, proposal submission, and proposal document storage

- **Who will use it?**
  - Office of Research and Super Center staff to prepare, approve and submit sponsored project proposals; Research Center staff to assist with proposal preparation; Principal Investigators (PIs), to provide compliance information and to certify and approve proposals; Chairs, Deans & Directors to approve proposals

- **How is it accessed?**
  - By computer using single sign-on at research.ku.streamlyne.org

- **Which department supports it? Who is the lead?**
  - KU Office of Research, Pre-Award Services
  - Associate Director, Nancy Biles
Benefits

**Transparency**
- Role-based permissions using single sign-on;
- Access to proposal status during proposal development and to submitted proposal documents;
- Stakeholders have visibility into commitment of institutional resources and compliance issues associated with proposal submissions.

**Efficiency**
Single system for budget development, proposal submission, routing and storage means less duplicate data entry for pre-award staff

**Accuracy**
Less manual data entry and data transfer between systems means fewer errors
What will stay the same

• Sponsored project proposals must be reviewed and approved before submission to sponsor
• Proposal assistance contacts:
  Office of Research, kucrpremgmt@lists.ku.edu
  Your research center pre-award preparation staff
• Pre-Award staff provide the same services
• Recommended timelines:
  Minimum of 3 weeks for proposal preparation
  Minimum of 5 working days for proposal review
What will change

PI Checklist will be completed in Streamlyne:

Once a proposal has been assigned and logged in, the PI will receive a link to the proposal, and will navigate to the Questions tab to answer the same type of compliance questions that now appear on the PI Checklist.
What will change

Electronic Proposal Routing and Approvals in Streamlyne:
PIs, Chairs, Deans & Directors will receive notifications that include a link to review and approve proposals in Streamlyne
# Sneak Peek

Be alert for system notifications

<table>
<thead>
<tr>
<th>From:</th>
<th><a href="mailto:workflow@ku.streamlyne.org">workflow@ku.streamlyne.org</a></th>
</tr>
</thead>
<tbody>
<tr>
<td>To:</td>
<td>Your Name Here</td>
</tr>
<tr>
<td>Subject:</td>
<td>Action List Reminder</td>
</tr>
<tr>
<td>Date:</td>
<td>Day, Date Time</td>
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</tbody>
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Your Action List has an eDoc (electronic document) that needs your attention:

Document ID: 12345  
Initiator: Admin, Streamlyne  
Type: Add/Modify Proposal Development Document  
Title: New Proposal No: 123; PI/PI Name; Sponsor: Sponsor Name; Due Date: MM/DD/YYYY

To respond to this eDoc:
- Go to [https://research.ku.streamlyne.org/proposalDevelopmentProposal.do?methodToCall=docHandler&docId=14244&command=displayActionListView](https://research.ku.streamlyne.org/proposalDevelopmentProposal.do?methodToCall=docHandler&docId=14244&command=displayActionListView)

Or you may access the eDoc from your Action List:
- Go to [https://research.ku.streamlyne.org/kew/ActionList.do](https://research.ku.streamlyne.org/kew/ActionList.do), and then click on the numeric Document ID: 14244 in the first column of the List.

To change how these email notifications are sent (daily, weekly or none):
- Go to [https://research.ku.streamlyne.org/kew/Preferences.do](https://research.ku.streamlyne.org/kew/Preferences.do)  
Action Item sent to PI Name
Reporting

• Phase II of Streamlyne project

• Working with the Business Intelligence Center/Oracle Analytics Cloud (OAC) to determine what reports will be available at Go-Live
FINANCIALS IN THE CLOUD – GRANTS

TOWNHALL
Financials in the Cloud (FITC) - Grants

• **What it is?**
  • Module within FITC that contains all post-award data, including award setup, award management, grant-related billing and accounts receivable, and all award closeout activity

• **Who will use it?**
  • Office of Research staff and other centralized staff
  • SSCs and others on campus who work with sponsored projects will have access to reporting from the system

• **How is it accessed?**
  • By computer via single sign-on

• **Which department supports it? Who is the lead?**
  • KU Office of Research
  • Assistant Vice Chancellor Alicia Reed
Benefits

• Budgetary controls help mitigate project overspending.

• Easier reporting:
  • With Oracle Analytics Cloud (OAC) an employee with appropriate level of access can run a required report instead of having to request it from the licensed users.

• Ability to determine if re-budgeting is within sponsor-approved limits.
GRANTS INTRODUCTION

High-level Process Overview

- **HR**: Personnel Data for Proposals & Projects, Project Numbers for HR Pay
- **Streamlyne**: Awarded Proposal Data
- **FITC-Grants**: Sponsor Data, Payable Transactions on Projects, Generate Accounting
- **FITC-P2P**: Generate Accounting
- **FITC-Accrual and Cash Ledgers**: Generate Accounting
What will change/what will stay the same

Project / Award / Cost Share

• Different:
  • Projects will have different numbering system, no alpha-prefixes
  • Funds will still be used for management, but each fund will require their own project
    • Cost Share will be a separate project, with it’s own number

• Same:
  • Related Projects in the same multi-project award, including cost share projects, will still be connected to the same award.
  • Agency prefixes will be provided for reporting purposes.
  • All Federal, State, Sponsor and University guidelines that govern award and project management still apply.
What will change/what will stay the same

Example of the converted and new project numbers

Current PS Project: **NSF0012345**, with funds 908 and 950

FITC Converted Project Numbers:

**NSF0012345** for 908

**12345950CS** for 950

New FITC Project Number: 1006789 (will start with 1, 7 digits)
Changes in terminology

**PeopleSoft**  
Posted Budget = Baseline  
New Budgets in PS = Budget versioning  
Budget Categories = Resources  
Fund = Class Category (reporting)

**FITC**
Reporting

• Most Research reporting will be out of Oracle Analytics Cloud (OAC).

• Please refer to handouts from Nick Stevens and the Business Intelligence Center on OAC reporting capabilities.
Process Updates

• Provisionals

• Budget control & alternative cost center identification

• Budget Revisions

• No Commitment Control Dates

• No Speed Charts
WHAT’S NEXT/CALL TO ACTION

- Office of Research will reach out to stakeholders for user feedback on
  - Pre-Award and Post Award processes
  - Additional reporting needs

- Please review existing awards to determine need for any possible adjustments prior to conversion.
HOW TO LEARN MORE & TRAINING

- Check [fst.ku.edu](http://fst.ku.edu) for updates on upcoming training opportunities.
QUESTIONS/CONTACT

General Questions
fst@ku.edu

Streamlyne Questions
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FITC Grants
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Thank you to our working group members:

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