ORSP Transitioning to Electronic Grant Routing Approvals

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BACKGROUND

Recently the campus initiated the "Lean University" initiative, and the Sponsored Program Submission and Approval Process was identified as one of these areas for improvement.

Before our new system was implemented, Fresno State utilized a review and approval process via a Project Information Form (PIF) to ensure that the Department and College were aware of and approved the proposal prepared by the Principal Investigator/Project Director and the institutional approvals per California State University system Executive Order 890 and APM 501 were met prior to submission.

The hard copy process was perceived to be complicated and cumbersome, and an electronic, automated workflow system was identified as a solution to expedite and improve this required approval process.

ORSP responded successfully to this challenge.

PIF PAPER FORM & THE ELECTRONIC APPROVAL PROCESS
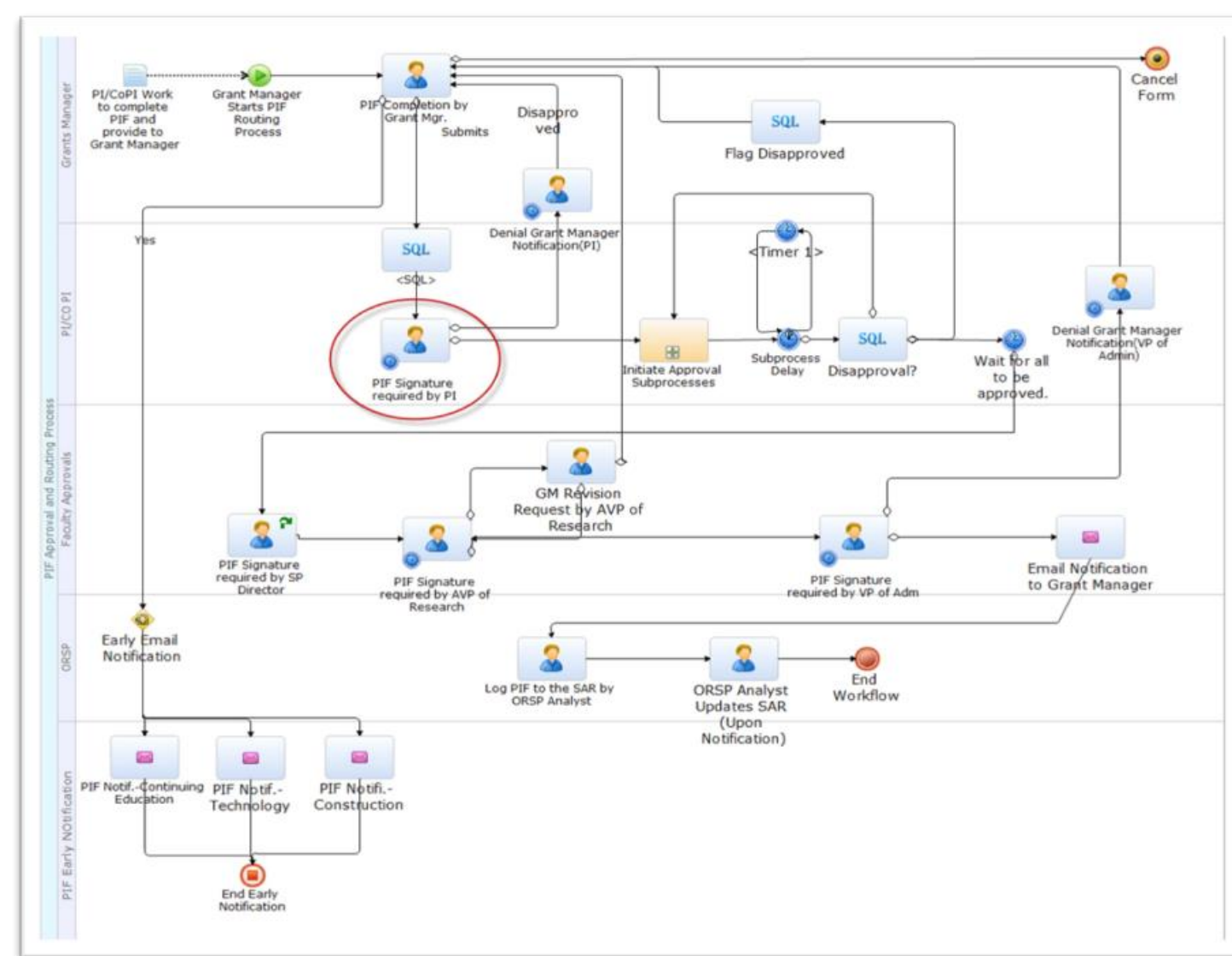
OBJECTIVES

- Reducing the duration of approval time

- Ability to track the Project Information Form during all stages of the approval

- Reduction of duplication of forms

- Ensuring compliance

PROCESS

ORSP collaborated closely with Fresno State's Information Systems personnel to incorporate the new automated process into the existing web-based management platform (BizFlow). Below are the documents created by ORSP for the requirements:

Name of the Document	Brief Description	Person Hours
ORSP Work Flow-Chart	Detailed flow-chart of all work processes for the grants and contracts submissions and approvals	40 hours
PIF Requirements and Specifications	Defining the goals, terminology, perimeters and process specifications for the approval routing process	120 hours
PIF Approval Process	Mapping of the PIF Approval Process for the electronic routing system	20 hours
BizFlow Testing Plan	Planning and execution of the BETA testing of all aspects the routing system	15 hours
BizFlow Notification and Announcement Plan	Campus notifications including faculty and staff on the new system	8 hours
BizFlow Training Plan	Planning and execution of the training all users from ORSP staff to administrators, faculty and staff	20 hours
BizFlow Training Presentations	Multiple power point presentations for training different users	120 hours
BizFlow Grant Manager Manual	User manual for the ORSP Grant managers	40 hours
BizFlow PI & Approvers Manual	User manual for all approvers – 3 major editions	80 hours

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