

Higher education researchers discover a better way to project finances

Custom-developed program using SAP software helps university manage post-award grants and projects

At one respected university located in the Northeast, becoming one of the leading recipients of federal research and development funds had profoundly benefited the institution. But, managing post-award research projects and grants—particularly the financial end—had become a labor-intensive, time-consuming process that kept researchers from, well, research.

The process became noticeably simpler and more efficient last year when about 4,000 members of the university were given access to a custom-developed solution using software from SAP, a leading provider of enterprise resource planning, business intelligence and related applications. The solution gives researchers access to summary views of all sponsored projects they manage, as well as detailed information on items such as equipment purchases or personnel assignments to better track spending over the length of the project. PIs, or principal investigators, oversee a particular grant or project and communicate with the sponsor.

“Before this solution, there wasn’t the ability to enter anticipated expenditures and marry them with historical data to project what your budget balance would be at the end of the budget year,” says the project manager for the university. “Now PIs can constantly correct spending patterns, adjust allocation of human resources or determine how the purchase of a piece of equipment will affect their year-end budget balance.”

This custom solution uses the SAP BusinessObjects Business Intelligence platform, which the university has used since 2011. “We also use the integrated planning functionality that’s part of [SAP NetWeaver] Business Warehouse, or BW, to allow users to enter projections directly into the system,” he says.

User-entered financial projections are stored in the business warehouse and accessed by the solution, allowing reports to display both actual expenditures and projections—providing visibility into future budget balances. For example, principal investigators can see all employees who have been or will be paid on their awards, making planning and error detection easier.



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“Administrators can move away from downloading reports from [SAP NetWeaver] Business Warehouse and formatting into spreadsheets and building their own financial reports, because all of that is automated now,” the project manager says. “Now more of their time is spent doing analysis and value-added [tasks] like looking for errors, detecting issues such as ‘Spending is out of control here,’ or ‘This person isn’t funded beyond a certain point.’”

Once a grant is awarded, it is entered into the SAP system, where the principal investigator for that grant is identified and authorized to view pertinent information. “From then on, a PI and administra-

tor both have access to the grant; they see exactly the same information,” the project manager says. “There’s one source of data and one truth, not multiple spreadsheets flying around.”

The data include:

- Summary-level reports that provide a holistic view of financial activity and personnel
- Detailed reports that focus on the sponsored program’s level of activity, allowing users to review summary information or detailed transactions
- Planning templates that allow users to enter and store budget, personnel, and non-personnel-related financial projections

The new solution improves the university risk/compliance profile because departments and divisions can more easily complete reconciliations and avoid deficit balances. It also allows for smoother collaboration among researchers and those who support them.

“With the steady increase in cross-disciplinary research, having a common and consistent set of reports makes conversations about post-award research financials much simpler. No translations required,” the project manager says.



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