

Effort Reporting



CedarCrestone takes a unique approach to resolving our PeopleSoft clients' effort reporting needs for Federal research funding. Rather than selling a separate software package that has to be installed and maintained separately and that has unique hardware, software and skill requirements, CedarCrestone provides a service for rapid implementation of a custom solution within an existing PeopleSoft environment. To facilitate this service, CedarCrestone has developed a Rapid Implementation "Effort Reporting Toolkit" for a robust effort reporting solution, complete with an implementation plan, functional/technical documentation, robust PeopleSoft tools, and highly experienced PeopleSoft Implementers for getting the project moving quickly.

This toolkit allows CedarCrestone to provide clients with the following:

- A robust configurable, proven Effort Reporting Solution up and running in a clients' existing PeopleSoft environment
- Defined and developed interfaces to other internal and external systems related to the effort reporting process
- Updated and supplemented documentation designed to meet client-specific needs based on their configuration and business processes
- Tailored end-user training based on the client's business processes

Client Spotlight

Arizona State University required four different types of effort reports to be configured: faculty/staff, hourly, graduate students, and standard students. Each of these reports had different effort-period structures, approval paths, and rule validations. Additionally, the requirements associated with each employee to get them into the correct report was based on different attributes in the HR system. CedarCrestone's configurable design allowed these reporting requirements to be set up with virtually no customizations. The needs for all four reports were met with standard configuration features of the CedarCrestone Effort Reporting Solution.

Effort Reporting Implementation Plan

Utilizing CedarCrestone's Propel Methodology, a typical implementation will have a duration of 4–6 months, assuming no major modifications are required. CedarCrestone will provide highly experienced PeopleSoft consultants with knowledge in finance, grants, HR and payroll. Our consultants have gained knowledge of the various systems by working with such institutions as the University of Delaware; Arizona State University; University of Maryland, Baltimore; University of Maryland, Baltimore County; and Florida A&M University. This experience enables our consultants to quickly develop an understanding of the current configuration and business processes of the client environment.



Company Capsule

Corporate Headquarters:
Alpharetta, GA

Primary Business:
Provider of Oracle's E-Business and PeopleSoft® Consulting, Hosting, and Managed Services

Number of Employees:
600

Oracle Partner Status:

- Certified Advantage Partner
- 2008 Titan Award Winner
- 2007 Titan Award Winner
- 2005 Titan Award Winner

Internal ERP Systems:

- PeopleSoft HRMS
- PeopleSoft Financials
- PeopleSoft CRM
- PeopleSoft ESA
- PeopleSoft Portals

Internal ERP Infrastructure:
Sun/Unix/Oracle

Key Services:
Implementations, Upgrades, Hosting, Lab, and Managed Services

This knowledge of our clients existing systems and processes allows us to develop very effective business process solutions. Not only will we be able to help identify the best configuration and business processes for the Effort Reporting Solution, but we will be able to help identify, understand, and implement business process improvements within the supporting systems that will better facilitate the compliance requirements related to effort reporting. These improvements will likely also carry over into other areas. For example, business process solutions that better facilitate OMB Circular A-21 requirements often improve other areas of grant management—such as grant billing and close-out requirements—and help better comply with OMB Circular A-110.

CedarCrestone's experienced consultants listened well to our needs and collectively explored options to meet our requirements. For example, UMB will be implementing new accounting methods related to revenue recognition and cost sharing for grants that will improve our performance. For reporting and access to information, CedarCrestone also helped us develop a custom end user reporting solution that will greatly enhance end user ability to analyze and report financial information. We appreciate the collaborative style and how well the team has worked together.

J. Kevin Curley
Executive Director, IT Projects
University of Maryland, Baltimore

The End Result

The end result is a solution developed within PeopleSoft along the lines of a typical PeopleSoft module. The look, feel, and use of the Effort Reporting Solution is very similar to that of other delivered PeopleSoft modules from its configurability to the navigation for end users. From an administrator's perspective, maintaining this solution is not dramatically different from other PeopleSoft modules, so it is easy to learn and maintain. End Users will experience the same navigation and use of pages as other functions of PeopleSoft that are often distributed to campus users, such as entering requisitions or P-card transactions in Finance or maintaining HR data in the Position table, Job table, or Commitment Accounting.

Employee IDs, Chart of Accounts, Security, e-mail notifications, etc. all utilize the existing solutions an institution has in place, minimizing any potential incompatibility or "mapping" from the defined values of one system to another. This reduces ongoing maintenance of the implemented solution. No new hardware or software is needed. Additionally, no new skill sets are needed. The same staff that supports the current PeopleSoft environment will be able to support and maintain the Effort Reporting Solution with minimal additional training.

CedarCrestone's Effort Reporting Solution provides institutions with a wide array of leading edge functionality:

- **Committed Effort.** Effort Reporting provides the ability to interface, enter, and manage Committed Effort to support the Plan Confirmation method described within the A-21 circular. Alternative configurations allow the committed module to be used for tracking and/or in support of After the Fact certification. The Committed module allows for tracking of commitments (including cost share) by Project and Employee for up to 20 Effort Periods.
- **Cost Sharing.** Committed Cost Sharing, Over-the-Cap cost sharing, and voluntary cost sharing are all captured and tracked in the system with multiple configurations available to support client-specific business process requirements and accounting methods. This gives the institution the ability to report on a complete summary of Cost Sharing requirements specific to payroll expenses. Over-the-Cap cost sharing is automatically calculated within the effort reporting system based on employee salary data from the HR/Payroll system(s).

- **NIH Salary Cap Rules.** Fully compliant with all NIH salary cap rules, along with identification of “over-the-cap” (OTC) salary expense by Effort Reporting period, CedarCrestone’s solution provides the ability to capture and analyze OTC salary on a more frequent, “sub-period” basis to capture fluctuations in the rate of pay defined by an individual’s Institution Base Salary.
- **Rule Validation.** Delivered with all the rules necessary to comply with OMB Circular A-21, Section J 10 and NIH guidelines on Salary Cap validation, the solution is designed to allow an institution to extend validation rules that are enforced and informational messages that are issues within the report approval process.

Whatever solution is being developed, all systems feeding it must be considered. Those solutions must be able to navigate their way through the maze of systems and business processes being used at your institution. CedarCrestone has extensive experience bringing these different functional areas together within a common system. Our experience with PeopleSoft Financials, Grants, SA, and HCM gives a matchless perspective in providing effort reporting solutions to our clients, utilizing our methodology for implementations, upgrades, and hosting services. Knowledge of this integrated nature of business related to grants and all PeopleSoft systems and business processes gives CedarCrestone a unique qualification for grant-related implementation and business process improvement projects.

System Requirements and Maintenance:

- Can be installed in any PeopleSoft system (FS, FS, SA, EPM, etc.) in version 8.x or higher
- No additional hardware or software is required
- Technical Skills required to support the system are the same as those needed to support existing PeopleSoft systems; no new skills are required
- Can be housed within other applications hosted at CedarCrestone Managed Services (CMS) and still integrated with other systems outside CMS

We needed something that was easily accessible, user friendly, robust reporting, traceable, trackable, and continuously updated with current information for management purposes. The CedarCrestone Electronic Effort Reporting System met all our needs and then some. Our PI's find it user friendly and easily accessible, auditors like it, it is paperless and enabled us to report and manage at every level.

Janice Schwartz

Director of Contract and Grant Reporting
University of Maryland, Baltimore County

CedarCrestone: Turning Software into Solutions

Analyze • Strategize • Design • Implement • Deploy • Upgrade • Manage • Optimize • Host

contact@CedarCrestone.com
866.827.3786

About CedarCrestone

CedarCrestone delivers real client success by providing consulting, technology, and managed services for the deployment, management, and optimization of Oracle applications and technology.