# 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.
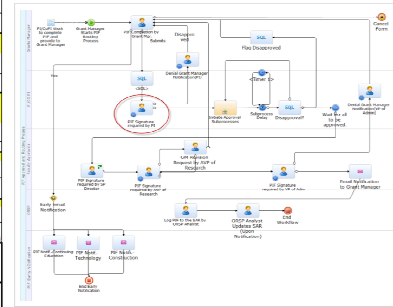
Before our new system was implemented, Fresno State utilized a review and approval process via a Project Information Form (PIF) to ensure that the Department and College were aware of and approved the proposal prepared by the Principal Investigator/Project Director and the institutional approvals per 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

If routing through BizFlow, no signatures are required.

## 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 |