

# Enhance Your Grants! Simplified Proposal Entry with Robust Routing

**Excerpts from Webinar 27 May 2009**

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# Welcome

- SmartERP's Webinar Series
  - March 4 : Workflow and Row Level Security Solutions for PeopleSoft
  - April 29 : Configurable PeopleSoft User Interface with Robust Workflow and Security Solutions
  - May 27 : Enhance Your Grants! Simplified Proposal Entry with Robust Routing
  - Upcoming Topics
    - Supplier Diversity Reporting
    - 1099 Enhancements including Procurement Cards
    - Look for our monthly invitations !

**For your convenience, replay of this webinar will be available after the presentation. Instructions to access the recorded webinars will be emailed to all registrants.**

# Introductions



## **Doris Wong**

CEO, Smart ERP Solutions, Inc.

Former Oracle Group VP and GM for PeopleSoft Enterprise

13 Years Experience with PeopleSoft



## **Dan White**

VP, Product Strategy, Smart ERP Solutions, Inc.

Former Oracle/PeopleSoft Principal Functional Architect

11 Years Experience with PeopleSoft

# Agenda

- Smart ERP Solutions, Inc.
  - Who We Are
  - Our Philosophy
  - Business Value
- Enhance Your Grants! Simplified Proposal Entry with Robust Routing
  - Implementation Use Cases : Pre-Award Phase
  - Complete Grants Business Process Solution
- Q & A

# About Smart ERP Solutions, Inc.



# Smart ERP Solutions, Inc.

- Comprised of the best former developers, architects and executives from PeopleSoft/Oracle
- Providing cost-effective, robust and repeatable “Smart Solutions” for your PeopleSoft applications

[www.smarterp.com](http://www.smarterp.com)



# SmartERP: Our Philosophy

- Enhance and Extend Standard PeopleSoft Functionality to Meet Business Needs
  - 3Cs : Common, Critical, Complementary
- Repeatable, Highly-Configurable and Innovative Solutions
- Release Independence
- Customer-Driven Requirements
- Architected and Designed as Add-On Solutions
- Lower Total Cost of Ownership
  - Minimal to No Customizations
  - Minimal Upgrade Impact
- Affordable and Cost-Effective



# SmartERP: Our Business Value

- SmartERP Solutions vs. Traditional Solutions
- Designed and Developed with Customer Requirements and Feedback
- Configurable to Meet Your Specific Business Requirements
- Quick and Short Implementation Times
- Solves Business Needs on Your Current PeopleSoft Release
- Proven and High-Quality Solutions



# SmartERP: Our Solutions

Business Requirements	Smart Solutions
Row level security on any data that requires limited or authorized access	Smart Security
Robust workflow approval capabilities across any documents across your Enterprise	Smart Workflow
Quick ChartField data entry to increase user productivity and data accuracy	Smart Keys
Streamlined and easy-to-use data entry pages configured to meet your specific business process requirements, incl. industry reqmts	Smart Docs
Enhanced user interface for self-service transactions	Smart Flex UI
One-stop visibility into the full business process lifecycle of a transaction	Smart Lifecycle Viewer
Addressing additional compliance requirements not in standard PeopleSoft	Smart Compliance
Manageable solutions for complex integration needs	Smart Integration Pack
Other <u>C</u> ommon, <u>C</u> ritical and <u>C</u> omplementary business requirements	Tell us, we'll build it!

# Simplified Proposal Entry with Robust Routings

# Enhance Your Grants

## *with Smart Solutions*

- Business Requirements

- Do you have a need to simplify the complexity of navigating your Grants business process?
  - Streamline the standard Grants Pre-Award process
  - Simplify and enter only those fields required for your Grants Pre-Award transaction
  - Tailor the look and feel for all types of users entering proposals
  - Increase productivity and experience of your users - \$\$\$
- Do you have a need to add some additional Grants business logic or functionality but don't want to customize?
  - Enhance your PeopleSoft Grants Pre-Award process
  - Capture proposal data outside of PeopleSoft
- Do you have a need for a more contemporary, flexible and intuitive user interface?
  - Tailor the look and feel for those unfamiliar with PeopleSoft
  - Intuitively manage any of the Grants business process phases
- Do you have a need to accomplish the above without increasing your total cost of ownership?
  - Customizations, Maintenance, Upgrades



# Implementation Use Cases

## Pre-Award Phase

# Implementation Use Cases

## *Wesleyan University*

- Mimic Current Check List
- Simplify Budget Entry
- Always 1 Project per Proposal
- 2 Approval Paths
  - Proposal Check List
  - Budget Creation

# Smart Grants Proposal at Wesleyan University (demo)

# Implementation Use Cases

## *Emory University*

- Simplified UI
- Certification vs. Approval
- Multiple Projects per Proposal
- Complex Routing based on Answers to Questions

# Proposal Express at Emory University (demo)



*Grants*  
*Lifecycle Viewer*  
*Post-Award Phase*

# Enhance Your Grants

## *Post-Award Management*

### Smart Grants Lifecycle Viewer

**Maintain  
Award**

PeopleSoft Projects,  
Grants, Contracts

**Incur Spending /  
Manage Budget**

PeopleSoft Projects,  
GL, Commitment  
Control, AP, PO

**Invoice Sponsor**

PeopleSoft Contracts,  
Billing, AR

**Apply Payments  
/ Manage  
Collection**

# Contact Information

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