

SPONSORED RESEARCH MANAGEMENT SOFTWARE PROJECT SCOPE

December 12, 2016

OVERVIEW

1. Project Background and Description

The Office of Research intends to secure a contract for a software that will assist the University in conducting sponsored projects and administration in an integrated and automated environment and encompass pre-award and post-award processes. The necessary features for the software are further outlined below.

2. Project Scope

- Contractor shall provide University with a Sponsored Research Management Software which meets the specifications and contains the features detailed in the Request for Proposal.
- Contractor shall provide support and maintenance of the Sponsored Research Management Software in years subsequent to initial installation.

3. High-Level Requirements

- An Accessibility Statement
- A budget module that uses date sensitive profile data along with proposal specific data to calculate budgets.
- Creates an award budget from a proposal budget or automatic budget rule.
- Electronic approval process. Prompts and tracks proposal approval as it is routed through the institutionally developed routing map. Employs email notifications to next approvers.
- System-to-System capability with Grants.gov. Capability to download opportunity info (form set and instructions), merge profile and proposal data, and submit to Grants.gov electronically or other portals, as appropriate.
- Post Award Deliverables Tracking and Notification: Management of all performance obligations that come with an award, such as reminders on due dates for reports or periodic account balances.
- Post-Award Financial Accounting Interface. Note: Software must integrate with University's existing Banner Financial Reporting Software Item
- Post-Award Equipment Tracking and Disposition – tracking and reporting on equipment purchased as part of an award.
- Compliance Monitoring – monitors compliance with project T & C, state, and federal guidelines.
- Automated Sponsor Invoicing - invoices sponsor based on deliverables, T & C, etc.
- Sub-recipient and Contractor Monitoring – Tracking of sub-recipient and contractor reports and expenditures.
- Project Financial Activity Tracking and Reporting: Using data from Banner to create common access for all interested parties, including PIs, to view and track financial activity on their projects.
- Automated Reporting
 - Weekly, monthly, quarterly, and annual reports of proposal submissions and award activities by PI, Department, College, Center, Agency, etc.

5. Deliverables by vendor

- Software installation, configuration, test and end user training and to also include the items listed below:
- Pre-Award Proposal Development
- Pre-Award Profile Administration
- Pre-Award Budget Module
- Pre-Award Proposal Certifications
- Pre-Award Automated Project Set-Up
- Pre-Award Communications Module
- Post Award Deliverables Tracking & Notification
- Post-Award Financial Accounting Interface
- Post-Award Budgeting
- Post-Award Modification
- Post-Award Equipment Tracking and Disposition
- Compliance Monitoring
- Automated Sponsor Invoicing
- Sub-recipient and Contractor Monitoring
- Project Financial Activity Tracking & Reporting
- Advanced Routing
- System to System Module (S2S)
- Automated Reporting

6. Affected Parties

- ITS
- Office of Planning and Finance
- Office of Research
- Grants Accounting
- TTU users

7. Affected Business Processes or Systems

- Banner platform
- Accounting Information Systems

8. Specific Exclusions from Scope

Not applicable.

9. Implementation Plan

Project is planned to start mid October 2016 and completion is TBD at this time as vendor of choice has not been selected and awarded with the contract.

SUBMITTED BY

Submitted By

Date