Automation Arrives Spring 2017

Three years of planning and preparation pays off

We are happy to announce the release of Duke's automated suite of closeout resources. All of these new tools and reports will be centrally located in the Grants Management tab of Duke@Work to assist Research Administrators with post award management and closeout submission of sponsored projects.

- **Tools and forms** will maintain existing functionality while incorporating enhanced features to increase efficiency.
- **Standard workflow routing** provides transparency during the approval process.
- **New and enhanced reports** are designed with flexibility in mind meeting the needs of a variety of users. Finally, a one-stop-shop for all things closeout!

Clean Close Achievements

FY2017 Marks Successful Transitions

- **TimeLine Success:**
  - Approximately 40% on-time submissions to date.
- **Late Activity Trends:**
  - Beyond remains greatest cause for late activity.
  - Only 192 late activity transactions since July.

Dear Closeout Team:

How can I prepare for the new tools?

- **Dear Closeout Team,**
  - Our department is running to have a smooth transition to the automated tools. What suggestions can you provide on how can be prepared for the relevant tasks?
- **Dear Controller Administrator:**
  - It is necessary you are thoroughly preparing your transition to the new work environment. To help you, we are providing you with key tasks to consider:
  - Ensuring that your transition to the new work environment is seamless.
  - Having a clear understanding of the new process.
  - Training on the new tools and processes.

What’s Happening in the Neighborhood

Meetings, Trainings, and Workshops

All users are encouraged to participate in training provided by the FAMU, RCC, and Finance teams. Reviews are scheduled to begin in late February.

- **Closeout workshops** will provide hands-on training for tool functionality and discussions related to the transition.
- **Field-specific training** is being scheduled with the goals to ensure an initial understanding of all closeout requirements and processes related to the above.

Additional workshops will be held to provide further training on new tools and processes.

- **Contact your grant officer** for more information.

The Campus Times Closeout Team Handout

CRAM Feb2017
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First Look: Closeout Tools and Reports

Forms will have similar functionality to those used today with the added benefit of built-in validation.

New and enhanced reports offer an abundance of detailed information at your fingertips.

~ increased visibility ~ better communication ~
~ improved efficiency ~
Clean Close Achievements
FY2017 Marks Successful Transitions

Timeliness Statistics:
Approximately 80% **on-time submissions** to date.

Late Activity Trends:
Payroll remains greatest cause for late activity.
Only 192 late activity transactions since July.

**PAMC: Total # of Late Activity Transactions by Month**
Based on data 7/1/2016 - 2/9/2017
Dear Closeout Team:

How can I prepare for the new tools?

Dear Closeout Team,
Our department is hoping to have a smooth transition to the automated tools. What suggestions can you provide so we can be prepared for the roll-out?
Thank you,
An Excited Research Administrator

Dear Research Administrator,

It is wonderful you are proactively preparing your department for the new tools launching in the Spring. Below are some suggestions to consider as you prepare your unit, team, and PI for the new suite of closeout tools:

- Assess your upcoming closeout deadlines to determine the submission format that will be required at time of submission.
- Familiarize yourself and your team with the workflow routing that will be used at time of Tasklist submission. This is identical to your CAS/Rebudget workflow.
- Identify barriers that could hinder timely submission of closeout documents.
- Discuss implications of departmental process changes with relevant staff and faculty.
- Attend available training, meetings, and/or workshops applicable for your area. Encourage others to attend these sessions as needed. See the What’s Happening section for training opportunities.

Consider institutional, departmental, and sponsor guidelines as you decide appropriate actions that should be taken. You are encouraged to reach out to your Implementation Team with any questions or concerns.
What's Happening in the Neighborhood  
Meetings, Trainings, and Workshops

All users are encouraged to participate in training provided by the ITeam, RCC, and Financial Services. Sessions are expected to begin in late March.

- **Closeout workshops** will provide hands on training for tool functionality and discussions related to institutional guidance.
- **Unit specific training** is being scheduled with the ITeam with an initial focus on departments with quickly approaching deadlines.
- **MSPA1** presentations will include critical information related to launch, implementation, and publication of guidance documents.

The Implementation Team currently provides assistance during published walk-in hours at ORS West and during Cookies & Closeouts. Additional opportunities for one-on-one assistance during the transition period are being scheduled and will be announced soon. The Implementation Team will release new information as it becomes available via the RCC and ORS listservs.

"The only bad thing is that we can't start using it now. - Tina Radford"