Proposal and Award Tracking System (PATS) Project Update

Gloria Su & Dan Newbower
Agenda

- Objectives
- Scope
- Phases
- Team Members
- Workgroups
- Next Steps
Project Objectives

- Improve usability of UCLA’s proposal and award tracking system
- Address current system limitations and challenges
- Expand data collection
- Implement a new data structure to improve reporting capabilities
- Clean up data to address inconsistencies created by changes in functionality over years of use
Project Scope

- Upgrade the proposal and award tracking system to InfoEd Version 12 and the “New Portal”
- Business process re-design related to the use and capture of data in the system
- Data clean-up/conversion
- Report re-design
Project Phases

- Phase 1: Plan
- Phase 2: Design
- Phase 3: Develop
- Phase 4: Test
- Phase 5: Deploy
Project Team

**OCGA**
- Barbara Siegel
- Ann Tsueng
- Cindy Gilbert
- Evan Garcia
- Joe Gibbs
- Keith Andre
- Kim Duiker
- Mark Lipschutz
- Mary Haskins
- Miesha Bailey

**ORA**
- Marcia Smith
- Dan Newbower

**EFM/IPAS**
- Li Tran
- Karla Bernal
- Marybeth Juezan
- Myra Huanosta
- Nancy Tse

**CTCU**
- Helene Orescan

**OIP-ISR**
- Lillian Smith

**ORIS**
- Jackson Jeng
- Gloria Su
- Porscha Madu

**Huron**
- Phil Infurna
- Kate McHugh
Workgroups

Primary
- Pre-Award/Proposal Intake Processing
- Award Processing
- Revised Goldenrod

Special Focus Groups
- Subawards
- Award Maintenance
- Unfunded Proposals/Agreements
- Custom Fields
- Reporting
Near Term Next Steps

- Document business processes and system configuration changes
- Meet with additional focus groups as needed
- Collaborate with PAMS
- Begin planning for data conversion