HERUG 2010
Research Management

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April 20, 2010

THE BEST-RUN BUSINESSES RUN SAP™

Agenda

1. Flowchart / model of a research project

2 Differences between PS and GM

3. “The Dutch solution”

4. Timing

5. Questions?

In the beginning…

Today…

HERUG 2010
March 24, 2010
Research Management
Research project
Grant
PS
CO-cost element
GM
Phases located in WBS element
Budgets
Labour costs
Material costs
Indirect costs
Earnings
university definition
Non-financial registrations
like manhours
Publications
etc
Grants
external
internal
Budgets
in all kinds of statuses
Cost invoiceble
(Overhead) Cost sharing
Cost not invoiceble
Earnings
grantor definition
Reporting
BO
Researcher desktop

Global Concepts: Access to Information

Academics

Management

Web Based Interface

Business Intelligence

SAP Grants Management

Grant Managers

Finance

SAP: how to use the different modules

- **SAP Internal Order**: All (Dutch) universities register the costs and earnings on CO internal orders
- **SAP PS (projectsystem**): PS facilitates the organization to register the projects in all their phases WBS elements)
- **SAP GM (Grants Management**): GM is ment to register all grants (internal as well as external) and is focused on the grantor and his rules
- **SAP Researcher desktop**: Besides the financial figures the researcher is facilitated to register all kinds of non-financial information
- **SAP BO**: Reporting tool that covers information from all the necessary modules

What are customers doing?

Early Adopters

- PS
- PS + in-house pre-award

Post GM development

- CO/PS + GM + 3rd party pre-award
- CO/PS + GM + GM pre-award
- CO/PS + GM + PPM/RPM (Partner solution)

Evolution of Researcher Portal/Desktop

- Customer developments
- Partner developments

Reporting and Analytics

Research Lifecycle

Researcher Environment

Researcher Desktop – Prototype

Overview - SAP NetWeaver Portal - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Search Favorites Media Links Customize Links MSN.com

Address http://pwdf2670.wdf.sap.corp:51000/irj/portal Go

Professor Adams

Help | Personalize | Log Off

Collaboration | Search Advanced Search

Home | Employee Self-Service

Overview | Employee Search | Working Time | Benefits and Payment | Personal Information | Career and Job | Purchasing | Work Environment | Travel and Expenses | Life

Overview | History Back Forward

Overview

Personal Profile

Research profile (key words)

Enter/Review collaboration request

Funding Opportunities

Sponsor/External projects

Internal projects

Personal Information

Curriculum Vitae

Publications, Citations and Awards

Compliance

University Policies and Procedures

Enter an IRB request

Enter Effort Certification records

Project/Grant Status

Ideas, Proposals, Applications

Project/Grant overview

Record Research results

Performance measures (KPIs)

Funding rate by Researcher

Funding rate by organization unit

Local intranet

Proposal Development Business Process

SAP Research Project Timeline

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THE BEST-RUN BUSINESSES RUN SAP™

NUS Research solution

NUS National University of Singapore

Research Management System at NUS

Kedhar

20 Apr 2010

HERUG 2010
Research Management

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THE BEST-RUN BUSINESSES RUN SAP™

Grant Management for Dutch Universities

Point of interest for the dutch universities:

- The goal: Internal & External reporting as uncomplicated and as default as possible, but with the condition that earnings from the external Fund should be as high as possible.

Reasons:

- Reporting to external sponsor takes a lot of time for every project, every period again

- Every sponsor (for example 300 external sponsors per university) is asking for another reporting template.

Solution:

To accomplish the goal, we've used the standard Grants Management functionality, in combination with BO Crystal Reports, for external reporting

Grants Management – Grantee (GM)

Overview

Application
Project Budgeting
Project Controlling
Internal & External Project reporting

Overview

Application
Project Budgeting
Project Controlling
Internal & External Project reporting

1. Project Application

Application | Project Budgeting | Project Expense Controlling | Internal & External Project reporting

1. Sponsor and Grant

<u>Points of interest:</u>

1. Proposal values which are stored in the Sponsor's Master Data can be directly adopted to the Grant. For example:
   - Standard cost sharing
   - Standard indirect cost rates
   - Standard reporting classes: Salary, Benefits, Equipment, etc
   - Default sales templates

2. Standard Grant data can be stored such as Sponsored Program, Sponsored Classes, Internal and external funds,.

3. Information as Grant Status, Person Responsible, Start/End date will be stored in the Grant.

4. Creating a Sponsor will automatically generate a Business Partner in FI automatically

1. Project Application

Application | Application Budgeting | Project Expense Controlling | Internal & External Project reporting

1.1 Sponsor example

Zakenpartner: 20000020 — TI-Pharma / 2300 AC LEIDEN

In ZP-rol weergeven: PSSP01 Subsidiënt

Geldigheidstijdvak: 000001 01.01.0001 - 31.12.99

Basisgegevens voor subsidie | Eigenschappen van subsidie | Ondersteunde programma's | Toeg.srten. inkomsten/uitgaven

Belastingcode voor soorten inkomsten/uitgaven

☑ Andere I/U-soorten in subs. toestaan

Toegestane soorten inkomsten/uitgaven

Soort	Omschr.	Geldig van	IDK-relevant	Terugz. n. subs.
G&A	General & Administration	01.01.2006	☐	☑
LAB & EQUIPMENT	LAB & EQUIPMENT	01.01.2006	☐	☑
PROEFDIEREN	Proefdieren	01.01.2006	☐	☑
SALARISKOSTEN	Salariskosten	01.01.2006	☑	☑
SUPERVISION	SUPERVISION	01.01.2006	☐	☑
			☐	☐

Overview

Application
Project Budgeting
Project Controlling
Internal & External Project reporting

2. Project Budgeting

2.1 Record the project budget

Points of interest:

1. Difference between internal & external funds
2. Budgeting over multiple years is possible
3. Budget supplements and refunds are possible
4. Multiple budget versions possible and also the possibility to use budget status
5. Budget warnings are possible

2. Project Budgeting

Application | **Project Budgeting** | Project Controlling | Internal & External Project reporting

2.1 Record budget

Documentnummer 1000000032 — Contr. OK

Kop | Extra informatie

Operatie	Enter	Valuta	EUR	Documentstatus	Geboekt
Subsidiëring	100014	Documentdatum	16.10.2009	Stornostatus	Normaal
GM-doc.soort	S4	Budgetversie	0	Budgetstatus	Vrijgegeven
Omschrijving kop				Basiscode	

Lijstweerg. | Lijstweergave | Kostendeling | IDK

Positie	Fonds	Subsidieprogramma	I/U-soort	Geldig van	Geldig tot	Nettobedrag	Boekingsdatum	Tekst
000050	TIPHARMA2	TI PHARMA	G&A	01.01.2011	31.12.2011	39.900,00	01.01.2011	
000060	TIPHARMA2	TI PHARMA	LAB & EQUIPMENT	01.01.2007	31.12.2007	23.500,00	01.01.2007	
000070	TIPHARMA2	TI PHARMA	LAB & EQUIPMENT	01.01.2008	31.12.2008	50.000,00	01.01.2008	
000080	TIPHARMA2	TI PHARMA	LAB & EQUIPMENT	01.01.2009	31.12.2009	50.000,00	01.01.2009	
000090	TIPHARMA2	TI PHARMA	LAB & EQUIPMENT	01.01.2010	31.12.2010	50.000,00	01.01.2010	

Overview

Application
Application Budgeting
Project Controlling
Internal & External Project reporting

3. Project Controlling

3.1 Project controlling

Point of interests

1. All postings will be posted to the grant: Material costs, Salary costs, Overhead costs, etc.

2. Sales postings will be posted to the grant

3. Manually entering the Fund or Grant for a particular posting is possible.

4. Derivation is possible. For example the combination ‘sponsor’ and G/L account’ will automatically derive the sponsored class, for example salary costs.

3. Project Controlling

Application | Project Budgeting | Project Controlling | Internal & External Project reporting

3.1 Material cost charges

Transactie: Factuur

Saldo: 1.000,00

Basisgegevens | Betaling | Details | Belasting | Notitie

Crediteur	1642	SGB-tek	
Factuurdatum	30.11.2009	Referentie	D
Boekingsdatum	30.11.2009		
BdNr.overk. nr			
Bedrag	1000	EUR	Belast. berek.
Belastingbedrag			
Tekst			
BetCondities	28 Dagen netto		
Basisdatum	30.11.2009		

Crediteur

Adres

SAP Nederland bv
Postbus 3292
5203 DG DEN BOSCH

☎ 073 485500

Bankrekening	0524132356
Bankcode	B
Bank	

OPn

1 Posities (Geen invoervariant geselecteerd)

GrBkR	Korte tekst	D/C	Bedrag doc.val	Be	Subsidiëring	Kostenpla	WBS-element
43790	Ov. algemene kstn	Debet	1.000,00		100014		UM.000014
		Debet					

3. Project Controlling

3.2 Overhead cost booking

Points of interest:

1. Applying indirect costs are determined using the Sponsor Classes. For example: 50% overhead is applied to Salaries for a Ti Pharma Project

2. In the Grant overhead cost percentage is stored

3. The overhead costs will be booked periodically on the Grant

Overview

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4. Internal & External reporting

Exernal reporting issues in ‘old situation’

- Every period (month, 6 months, year) the project controller needs to translate all records, stored in SAP, to the right sponsored classes for the template of the sponsor.
- The most universities are using Excel for reporting to the Sponsor, every period
- They are classifying every period again for every grant manually all records to the sponsored classes in the template of the Sponsor

External reporting benefits by using Grant Management (new situation)

- The classification is already automatically done, during the month
- The reporting template is automatically generated, based on sponsored classes
- The project controller can spend his time on analysing the data, not on gathering the same data every month

4. Internal & External reporting

Application → Project Budgeting → Project Controlling → **Internal & External Project reporting**

FINANCIEEL OVERZICHT in Euro's — *stand per:* 30-06-2009

Sap-nummer:	**30983230B**
titel	TI Pharma T2-108
subsidiegever	TI Pharma
periode	01 februari 2007 t/m 31 januari 2012

Grant Sponsor

Beoordeling project:

				Datum:
1. Geld			X	09-07-2009
2. Ov.beh.asp.		X		18-04-2008

Sponsorred classes

	Initiele begroting	herziening	actuele begroting	werkelijk declarabel 2007	werkelijk declarabel 2008	werkelijk declarabel 2009	werkelijk declarabel 2010	werkelijk declarabel 2011	werkelijk declarabel 2012	totaal declarabel tot heden	verschil t.o.v. begroting	verwacht declarabel tot eind project	werkelijk + verwacht declarabel	verwacht verschil t.o.v. begroting
Personele kosten														
A.E. Strzelecka:	73.800,00		73.800,00	17.262,16	20.197,80	10.898,49				48.358,45	25.441,56	27.280,35	75.638,80	-1.838,80
- 0,5 fte 01-02-2007 t/m 31-01-2010														
- 0,3 fte 01-02-2010 t/m 31-01-2011														
P. Lemkens:	160.000,00		160.000,00	20.733,86	34.972,33	19.854,17				75.560,36	84.439,64	82.670,21	158.230,57	1.769,43
- 1,0 fte 19-04-2007 t/m 18-04-2011														
J. Nelissen:	160.000,00		160.000,00	12.464,84	33.618,22	19.557,38				65.640,44	94.359,56	94.369,78	160.010,22	-10,22
- 1,0 fte 01-08-2007 t/m 31-07-2011														
M.J.P.M.T. Meens:	160.000,00		160.000,00	7.400,90	32.467,02	20.106,64				59.974,56	100.025,44	103.580,88	163.555,44	-3.555,44
- 1,0 fte 01-10-2007 t/m 30-09-2011														
G. Fazzi:	45.100,00		45.100,00	5.564,20	16.705,46	9.136,64				31.406,29	13.693,71	34.035,54	65.441,84	-20.341,84
- 0,3 fte 01-09-2007 t/m 31-08-2010														
- 0,2 fte 01-09-2010 t/m 31-08-2011														
	598.900,00	0,00	598.900,00	63.425,96	137.960,83	79.553,32	0,00	0,00	0,00	280.940,10	317.959,90	341.936,77	622.876,87	-23.976,87
50% G&A	299.450,00		299.450,00	31.712,98	68.980,41	39.776,66	0,00	0,00	0,00	140.470,05	158.979,95	170.968,38	311.438,43	-11.988,43
lab/equipment	223.500,00		223.500,00	29.000,00	57.000,00	28.500,00				114.500,00	223.500,00	109.000,00	223.500,00	0,00
supervision	223.500,00		223.500,00	29.000,00	57.000,00	28.500,00				114.500,00	223.500,00	109.000,00	223.500,00	0,00
TOTAAL PERSONELE KOSTEN	**1.345.350,00**	**0,00**	**1.345.350,00**	**153.138,93**	**320.941,24**	**176.329,97**	**0,00**	**0,00**	**0,00**	**650.410,15**	**923.939,85**	**730.905,15**	**1.381.315,30**	**-35.965,30**
Proefdieren	60.000,00		60.000,00	0,00	6.404,07	10.120,58				16.524,65	43.475,35	43.475,35	60.000,00	0,00
TOTAAL MATERIËLE KOSTEN	**60.000,00**	**0,00**	**60.000,00**	**0,00**	**6.404,07**	**10.120,58**	**0,00**	**0,00**	**0,00**	**16.524,65**	**43.475,35**	**43.475,35**	**60.000,00**	**0,00**
TOTAAL KOSTEN	**1.405.350,00**	**0,00**	**1.405.350,00**	**153.138,93**	**327.345,31**	**186.450,55**	**0,00**	**0,00**	**0,00**	**666.934,80**	**738.415,20**	**774.380,50**	**1.441.315,30**	**-35.965,30**
Subsidie										**1.405.350,00**				
Nog te besteden subsidie										**738.415,20**				

External funds

PS-project

	Initiele verwacht resultaat	herziening	actuele verwacht resultaat	werkelijk resultaat 2007	werkelijk resultaat 2008	werkelijk resultaat 2009	werkelijk resultaat 2010	werkelijk resultaat 2011	werkelijk resultaat 2012	werkelijk resultaat tot heden		nog te verwachten resultaat	totaal verwacht resultaat
50% G&A	*299.450,00*		*299.450,00*	*31.712,98*	*68.980,41*	*39.776,66*	*0,00*	*0,00*	*0,00*	*140.470,05*		*170.968,38*	*311.438,43*
lab/equipment	*223.500,00*		*223.500,00*	*29.000,00*	*57.000,00*	*28.500,00*	*0,00*	*0,00*	*0,00*	*114.500,00*		*109.000,00*	*223.500,00*
supervision	*223.500,00*		*223.500,00*	*29.000,00*	*57.000,00*	*28.500,00*	*0,00*	*0,00*	*0,00*	*114.500,00*		*109.000,00*	*223.500,00*
salaris all-in te GS personeel	*0,00*		*0,00*	*0,00*	*0,00*	*0,00*	*0,00*	*0,00*	*0,00*	*0,00*		*0,00*	*0,00*
Ruimte gecreerd op personeel	***746.450,00***	***0,00***	***746.450,00***	***83.712,98***	***182.980,41***	***96.776,66***	***0,00***	***0,00***	***0,00***	***369.470,05***		***388.968,38***	***758.438,43***

4. Internal & External reporting

Naming in excel reporting

Research Sponsor

Financieel overzicht in Euro's

Project nummer:	UM.000014		
Project titel:	Ti Pharma T2-108		
Project sponsor:	TI-Pharma		
Project Periode:	1/2/2007	t/m	31/12/2012
Subsidie bedrag:	€1405350.00		

Universiteit Maastricht

External Fund: Sponsor contribution

External Fund

Internal Fund

Sponsorred Classes

	Budget	Werkelijk 2007	Werkelijk 2008	Werkelijk 2009	Werkelijk 2010	Werkelijk 2011	Werkelijk totaal tot heden	Verschil totaal tov begroting	Verwacht declarabel	Werkelijk + verwacht declarabel	Totaal kosten tov begroting
Project opbrengsten											
NIET declarabel											
UM01/I0002											
SUBSIDIES EXTRA	200,000	0	0	0	0	0	0				
	200,000	**0**	**0**	**0**	**0**	**0**	**0**				
	200,000	**0**	**0**	**0**	**0**	**0**	**0**				
Project kosten											
Declarabel											
UM01/TIPHARMA2											
G&A	299.450	0	0	0	0	0	0	299.450	0	0	299.450
LAB & EQUIPMENT	223.500	29.000	57.000	28.500	0	0	114.500	109.000	0	114.500	109.000
PROEFDIEREN	60.000	0	6.404	10.121	0	0	16.525	43.475	0	16.525	43.475
SALARISKOSTEN	598.900	63.426	137.961	79.553	0	0	280.940	317.960	0	280.940	317.960
SUPERVISION	223.500	29.000	57.000	28.500	0	0	114.500	109.000	0	114.500	109.000
	1.405.350	**121.426**	**258.365**	**146.674**	**0**	**0**	**526.465**	**878.885**	**0**	**526.465**	**878.885**
NIET declarabel											
UM01/I0002											
FACULTAIRE HEFFING	124.663	0	45.690	8.793	0	0	54.483	70.181	0	54.483	70.181
KOSTEN TIPHARMA	400.000	0	109.663	54.314	0	0	163.977	236.023	0	163.977	236.023
MATERIELE KOSTEN	0	13.153	43.883	35.223	0	0	92.259	-92.259	0	92.259	-92.259
SUPERVISION	0	3.065	0	0	0	0	3.065	-3.065	0	3.065	-3.065
	524.663	**16.218**	**199.236**	**98.330**	**0**	**0**	**313.784**	**210.880**	**0**	**313.784**	**210.880**
	1,930,013	**137,644**	**457,600**	**245,004**	**0**	**0**	**840,248**	**1,089,765**	**0**	**840,248**	**1,089,765**

4. Internal & External reporting

Financieel overzicht in Euro's

Project nummer:	UM.000014		
Project titel:	Ti Pharma T2-108		
Project sponsor:	TI-Pharma		
Project Periode:	1/2/2007	t/m	31/12/2012
Subsidie bedrag:	€1405350.00		

Universiteit Maastricht

Medewerkers	Budget	Kosten 2007	Kosten 2008	Kosten 2009	Kosten 2010	Kosten 2011	Kosten totaal tot heden	Verschil totaal tov begroting	Verwacht declarabel	Werkelijk + verwacht declarabel	Totaal kosten tov begroting
G.E. Fazzi	0	5,564	16,705	9,137	0	0	31,406	-31,406	0	31,406	-31,406
A.E. Strzelecka	0	17,262	20,198	10,898	0	0	48,358	-48,358	0	48,358	-48,358
P. Lemkens	0	20,734	34,972	19,854	0	0	75,560	-75,560	0	75,560	-75,560
J. Nelissen	0	12,465	33,618	19,557	0	0	65,640	-65,640	0	65,640	-65,640
M.J.P.M.T. Meens	0	7,401	32,467	20,107	0	0	59,975	-59,975	0	59,975	-59,975
	0	**63,426**	**137,961**	**79,553**	**0**	**0**	**280,940**	**-280,940**	**0**	**280,940**	**-280,940**

Budgetuitsplitsing	Budget initieel	Budget herziening	Budget actueel
Declarabel	**1,405,350**	**0**	**1,405,350**
UM01/TIPHARMA2			
G&A	299,450	0	299,450
LAB & EQUIPMENT	223,500	0	223,500
PROEFDIEREN	60,000	0	60,000
SALARISKOSTEN	598,900	0	598,900
SUPERVISION	223,500	0	223,500
	1,405,350	**0**	**1,405,350**
NIET declarabel	**724,663**	**0**	**724,663**
UM01/I0002			
FACULTAIRE HEFFING	124,663	0	124,663
KOSTEN TIPHARMA	400,000	0	400,000
SUBSIDIES EXTRA	200,000	0	200,000
	724,663	**0**	**724,663**

Thank you!