



# Pre and Post Award Management

The Agresso QLF Web Portal has been introduced as a means of delivering the desired distributed access using browser-based technology. It is more appropriate to the needs of occasional users, extremely flexible yet simple to deploy and conforms to all the business rules and restrictions defined within the core Agresso QLF system

The main element of the Agresso QLF Web Portal is a series of Web Parts, each of which provides a piece of functionality in much the same way as a Workbench in core Agresso QLF does.

Agresso Pre and Post Award Management (PPAM) has been created to aid in the increasingly complex and demanding process of managing research through addressing a number of business critical requirements facing all research-active HEI's.

Designed with the full collaboration and consultation of a number of UK institutions, Agresso PPAM meets key criteria for the successful implementation of a sophisticated system for the control of all activities in an institution which relates to research and grant projects.

An intuitive web or windows based system which can be deployed with the minimum of effort which embraces staff at all levels and technical abilities, ranging from academic and research staff to support and management staff in both departments and the centre.

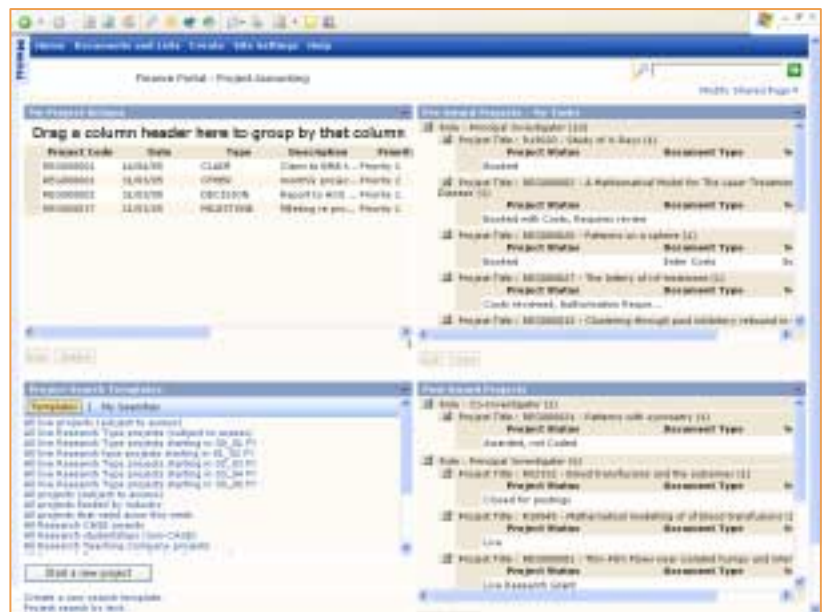
Allowing Agresso Pre and Post Award Management to be delivered via a portal ensures that the largest possible take up by staff across the campus. It removes the issue of hardware capability and provides an easy to understand interface.

The portal also gives the benefit of

- ◆ Document collaboration and management facilities
- ◆ Collaboration services
- ◆ Subscription and publishing services
- ◆ News and user interest groups
- ◆ Full reporting via the web interface
- ◆ Customisable interface by user or workgroup

## Agresso PPAM Home Page

Agresso PPAM delivers an interactive actions diary for each user of the system. Based on the user's "role" associated with each project, the system automatically highlights all individual outstanding actions. Users are empowered to manage their project workload and monitor actions daily, weekly or monthly. Where individual users have multiple roles across a variety of projects Agresso PPAM collates all outstanding actions into one easy to use workbench.

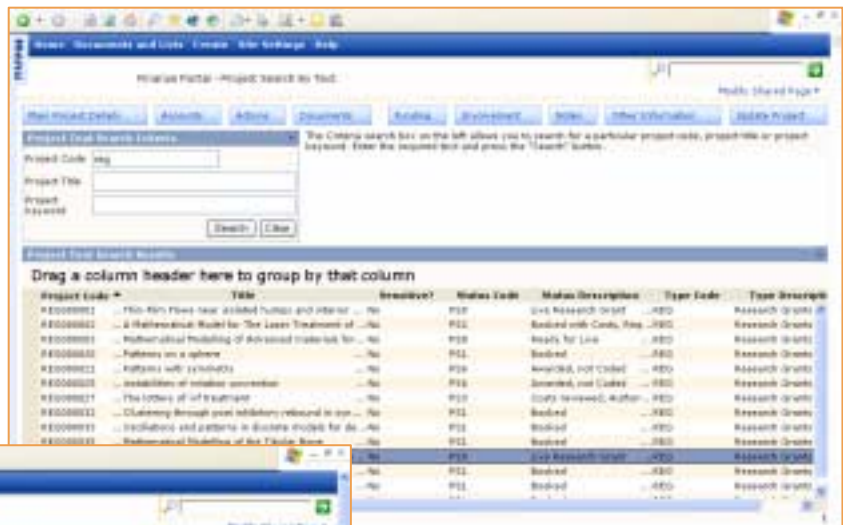


## Project information

From the home page users can view or edit project information simply by selecting the appropriate project to which they have access, alternatively a keyword search is provided.

Once the user has found the appropriate project they can select one of a series of Tabs to view further information. The information that can be displayed includes:

- Main Project Details
- Accounts
- Actions
- Documents
- Funding
- Involvement
- Notes
- Other information



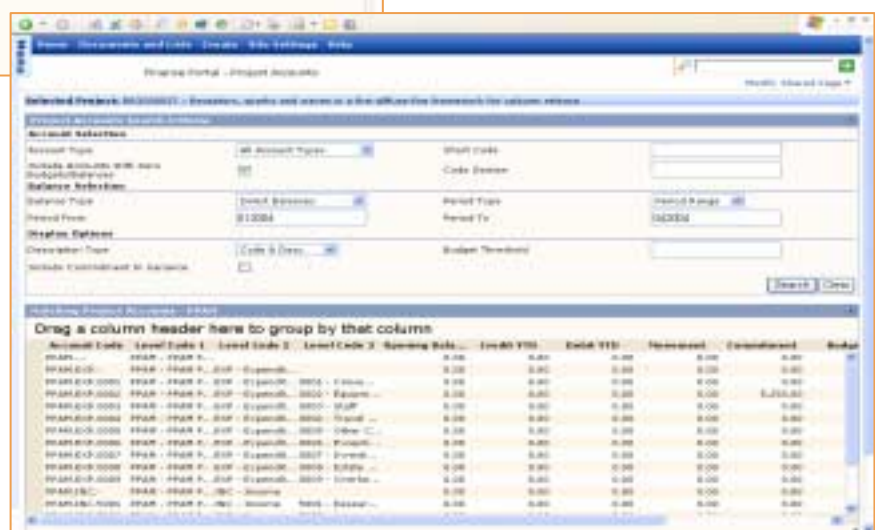
### Main Project Details

This Tab provides information such as key dates for the project, references, a summary of the project and also an audit trail for the project, i.e. who has moved the project to the next stage and when

## Accounts

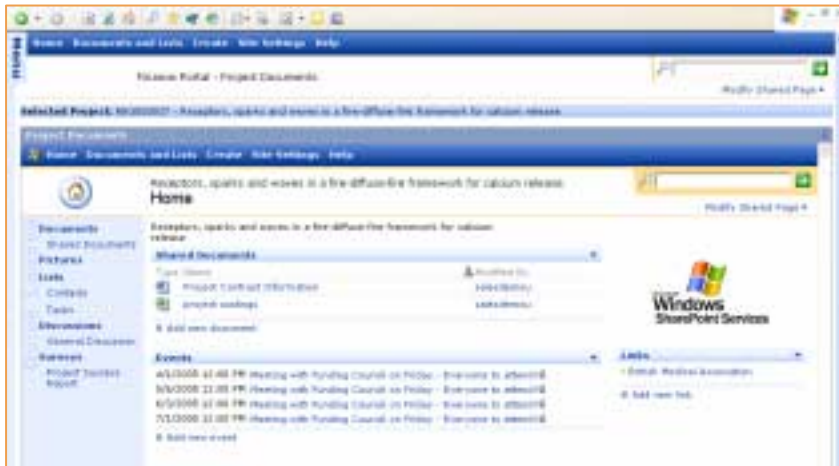
The accounts tab provides financial information relating to the project. For example users can view all financial and commitment transactions which have been attributed to the project whilst live budgetary views can be used to help with forecasting.

Both balance and transactional information can be displayed in a clear and concise screen which provides further analysis functionality such as grouping objects. This tab displays just those actions associated with the specific project.



### Actions

The Agresso PPAM home page displays all the tasks and actions for all of the user's projects. This tab displays just those actions associated with the specific project.

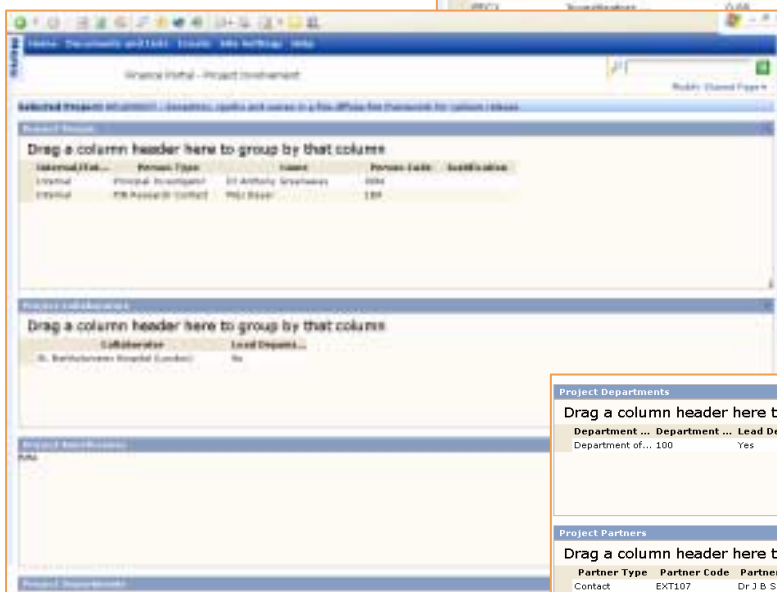
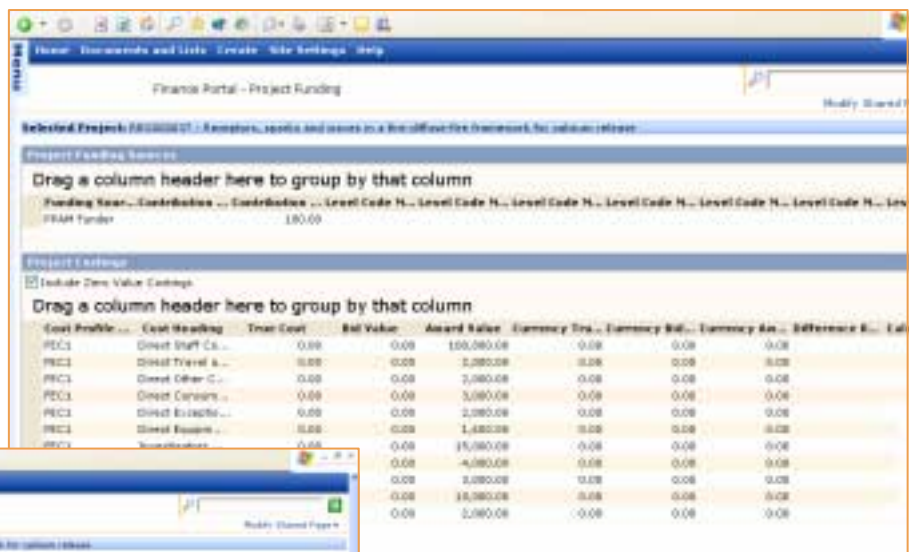


### Documents

Many institutions hold a number of documents which provide important information for a project. Sometimes this information can be held in a number of locations making it difficult for individuals who need to view the information. As part of the Agresso PPAM portal delivery document stores are created for each individual project which make it easy for users to view and add documents to the project store. Each item can be in effect "booked out" and versioned if any changes are made.

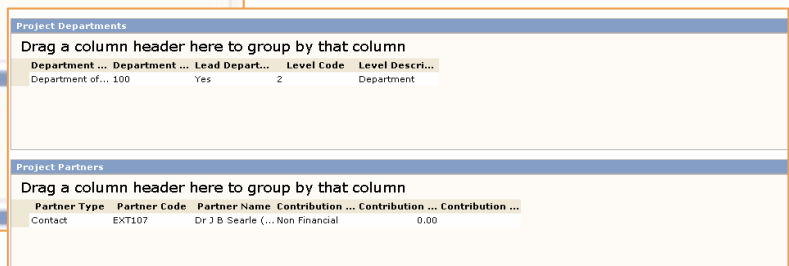
### Funding

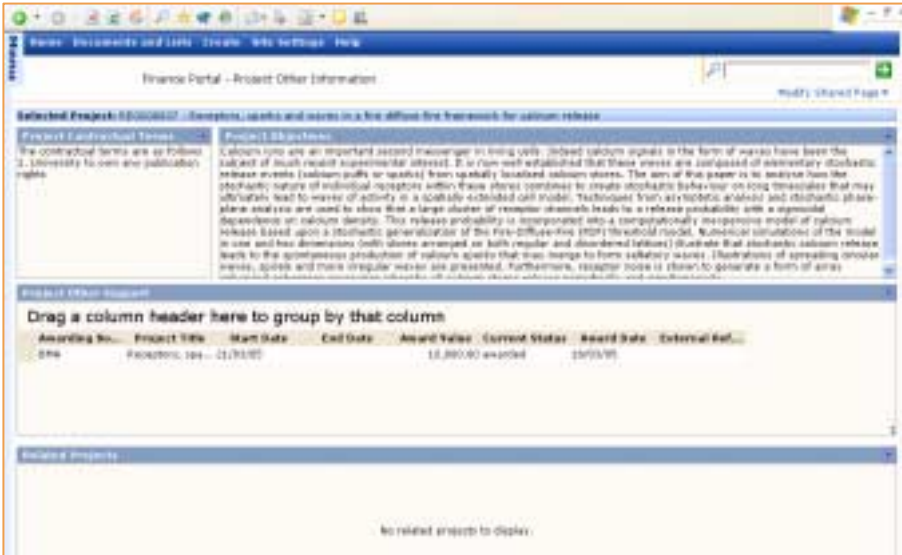
The funding tab provides the user with information relating to the funding source and the cost profile. The cost profile will display details relating to each heading of the profile.



### Involvement

This tab provides information relating to who is involved with the project. This includes the people directly involved, collaborators, beneficiaries, departments, partners and sub contractors.





### Other Information

This tab provides information relating to the project objectives, contractual information, other support and if the project is linked to another internal or external project.

### Project Search Templates and Reporting

A unique approach of the Agresso PPAM reporting allows Academics and those involved with projects to create any number of individual "data extracts" or views of single or multiple projects. The search criteria provided is extensive and all users of the system can manipulate and save these data extracts within the "my searches" folder of Agresso PPAM.

For example a Head of school may wish to see all their departments projects that have been successful this year or all the projects they are involved in which require them to carry out an action this month, e.g. a report, claim.

The user defined data retrieval views provided by "my searches" can then be used as the source data for the production of any one of the standard reports. For example, as part of the Head of school "my searches" the data for all my projects within my department and all my department's successful projects will be different. This will therefore provide the user with different views of the same standard report and thus providing different key performance indicators.

This approach caters for a wide variety of project types and the individual key performance monitoring requirements of each institution.

A library of my searches can be created enabling users to benefit from searches created by other users. The library searches take into consideration user access permissions thus ensuring data integrity.

**Create Search Template**  
Please enter the search criteria below then press 'Save Template'. The search will be added to the User Search Search Template

**Search Template**  
RESGRANTS | Research Grant

**Project Types to include**

- Capital
- Conferences
- Other Small Grants
- Other
- Research CASE Studentship
- Research Fellowship

**Project Status to include**

**Project Departments to include**

Level: Department

- English Department
- Department of Mathematical Medicine
- Biology Department
- Chemistry Department
- Physics Department
- Civil Engineering Department

Lead Department: No Selection

**Project People Criteria**

**Search On Other Project Roles**

**Search On End Of Project Roles**

**Other Project Criteria**

**Project Search Templates**

Templates | My Searches

All live projects requiring action this month

My Projects

My research projects

Projects I am involved with

Projects requiring finance coding & due to start this month

Projects Requiring Initial Document Production

Start a new project

Create a new search template.  
Project search by text.  
Run a project report.

**Application Success Rate**

Year	Applications	Successful Projects	Success Rate
2008/09	100	20	20%
2009/10	120	25	20.8%
2010/11	150	30	20%

**Successful Projects**

Lead Department	Department of Mathematical Medicine	Project Title	Project Status	Start Date	End Date
Mathematics	Department of Mathematical Medicine	Research Grant	Completed	01/01/07	31/03/09
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## Project Entry

Agresso PPAM deals with the full lifecycle of a project from the initial planning of a proposal to the completion. The system caters for all types of projects and jobs from research projects to capital grants; the distinguishing factor is the institutionally defined project types. The project type allows the Institution to differentiate between different types of projects and therefore determine the information that is required and the different processing rules for each type of project.

The software provides the mechanism for the management and monitoring of each project from inception through application and proposal, award and finally completion. The system possesses simple yet powerful screens that allow the user to match the profile of any complex project structure whilst at all times keeping each project's key components visible and pertinent.

The Agresso Pre and Post Award Management's highly adaptable workflow system ensures that the institutions management processes can be replicated during the projects lifecycle. This ensures that the tracking of all projects reflects the individual business processes of an institution.

The workflow and processing rules for each project type are determined by the institutionally defined project status. This allows for one record to be created and maintained whilst the project proceeds through its lifecycle. The processing rules incorporate the required documentation/action that needs to be completed for the project to proceed to the next status. In the case of the University, project statuses may include outline proposal, proposal submitted to Head of Department, proposal declined etc. Actions/documents that need to be completed could include authorisation and checking by Head of department, cost information entered, etc.

The system delivers user defined web based forms to collect all data and to track a project through all of its stages.

Status From	Document Type	Status To
Booked info	Enter Objectives Information	Objectives Entered, More Information Required
Costings Entered, More Information Required	Enter Project Detail Information	Costings and Details Entered, Objectives Required
Costings Entered, More Information Required	Enter Objectives Information	Costings And Objectives Entered, Details Required
Details Entered, More Information Required	Enter Costing Information	Costings and Details Entered, Objectives Required
Details Entered, More Information Required	Enter Objectives Information	Details and Objectives Entered, Costings Required
Objectives Entered, More Information Required	Enter Costing Information	Costings And Objectives Entered, Details Required
Objectives Entered, More Information Required	Enter Project Detail Information	Details and Objectives Entered, Costings Required
Costings and Details Entered, Objectives Required	Enter Objectives Information	Information Review Required
Costings And Objectives Entered, Details Required	Enter Project Detail Information	Information Review Required
Details and Objectives Entered, Costings Required	Enter Costing Information	Information Review Required
Information Review Required	Refer For Costing Information	Details and Objectives Entered, Costings Required
Information Review Required	Refer For Objectives Information	Costings and Details Entered, Objectives Required
Information Review Required	Refer For Project Details Information	Costings And Objectives Entered, Details Required