

CAL POLY POMONA FOUNDATION

FOLLOWING THE MONEY! HOW CAL POLY USES FINANCE ENTERPRISE TO STREAMLINE RESEARCH GRANT MANAGEMENT

California State Polytechnic University Pomona has long relied on grants from the U.S. Department of Education, the National Science Foundation and other organizations to fund ground-breaking projects. Administering these grants for the university is the Cal Poly Foundation Inc., a non-profit organization that serves as the contracting agent for grants awarded to the Cal Poly faculty by both governmental and private institutions.

Cal Poly Foundation uses financial management software to provide easier access to grant recipients' accounts. Built behind a secured terminal-access point, this system originally allowed users to remotely access their various Foundation projects, along with grant information from computers across campus, giving them visibility into critical information.

Over the years, the number of grants and projects that Cal Poly receives has grown to upwards of 300 faculty and staff projects annually. However, as the number of grants and projects have increased, so has the strain placed upon the Cal Poly Foundation to properly monitor and manage them.

Cal Poly was using a much older CentralSquare system that didn't meet their current needs. Users had to navigate through various screens to get to the information they needed, then had to remember esoteric

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VITAL STATISTICS

Product: Finance Enterprise

Customer: Cal Poly

Location: Pomona, CA

Users: 500

Year started with CentralSquare: 1988

Savings: 40% drop in calls for help with grants

key strokes to retrieve it. Lacking customization options and having pertinent information distributed across multiple tabs within the system, users were often left with more questions than answers.

To answer those questions, the Foundation turned to the IT department. As a result, IT was fielding an average of 30 calls per week, taking up to 5 hours of support time.

"It was inconvenient for them and for us," said Joe Bustamante, information systems analyst for the Foundation. "Every time users needed to get in, they couldn't remember how and came to us to reset their access. What's more, once we re-established their login credentials, we were often addressing usability questions due to the complex layout, which left both parties frustrated with the experience."

The problem wasn't just that the software was hard to use. User demands have evolved since the software was first implemented. Today's grant recipients seek



mobility and convenient access from any location. And coupled with today's demands for a modern, intuitive user experience, the reliance on dedicated terminal access quickly became a cumbersome and complicated process.

Cal Poly needed another solution. It had clear ideas about how the financial solution should work. Foundation leaders wanted a powerful financial program to help manage and track the grants and projects but it had to simplify the user experience and allow the user to customize the solution for specific roles and needs.

THE SOLUTION: FROM TERMINAL TO MOBILE

The Foundation looked at several financial solutions but chose to remain with CentralSquare and migrate to their new solution, Finance Enterprise. "We've worked closely with CentralSquare since 1988 and value that relationship," said Randy Townsend, director of information technology. "It wasn't just the product, it was also the professional partnership we have with them that was important in making this decision," Townsend said.

With Finance Enterprise, the Foundation has a robust, customizable solution that handles both the scale and unique needs of its grant and project management program.

The platform's design removes the need for terminal access, allowing grant recipients to securely – and easily – retrieve their information no matter the device or location. In addition to simplifying the login process, Finance Enterprise also streamlines the user experience by making all pertinent grant and project information easily accessible by the user. With centralized data, grant recipients can now easily find their grant information and produce and export specific reports as needed, all without having to involve the IT department.

THE RESULT: SIMPLIFIED USER EXPERIENCE INCREASES SATISFACTION FOR PROJECT AND GRANT RECIPIENTS AND IT

Through its partnership with CentralSquare, Cal Poly Pomona has successfully rolled out customized finance software that's easy for its employees and faculty to use.

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**- Debra Chavez,
financial systems manager**

The simplicity and functionality of CentralSquare's Finance Enterprise has led to a better user experience among grant and project recipients. The modern, clean design and intuitive interface have empowered the Foundation to take a self-service approach to project and grant management, which has drastically reduced the management burden on the IT team.

With the implementation of Finance Enterprise, IT has seen the number of calls for help with grants decrease by 40%. "Initial feedback has been great," said Debra Chavez, financial systems manager for the foundation. "It's so much easier to use than the system we had before. Since account details are now on one page, people no longer hunt through the system or call us to find the right report. As for IT, the support calls have started to subside, which is allowing us to tackle other pertinent projects for the Foundation," Chavez stated.

"We're just getting started in using the full functionality of Finance Enterprise," Townsend said. "In the months to come, we plan to introduce role-based dashboards and really hope to more fully utilize the powerful features that Finance Enterprise offers."

