User Group Meeting

December 2, 2011
# Agenda

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<thead>
<tr>
<th>Time</th>
<th>Session Title</th>
<th>Presenter</th>
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<tr>
<td>12:00</td>
<td>Welcome</td>
<td>Christine Lavoie</td>
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<td>12:05</td>
<td>Session Objectives</td>
<td>Christine Lavoie</td>
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<td>12:10</td>
<td>USC’s Research Administration System</td>
<td>Christine Lavoie</td>
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<td>12:20</td>
<td>Project Overview &amp; Timeline</td>
<td>Jennifer Love</td>
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<td>12:30</td>
<td>KC Demonstration</td>
<td>Larry Jackson</td>
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<td>1:15</td>
<td>User Roles and Responsibilities</td>
<td>Christine Lavoie</td>
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<td>Discussion &amp; Next Steps</td>
<td>Christine Lavoie</td>
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Session Objectives

• Understand the following about the project:
  – Overview, including goals & timelines
  – Role of users in the project & their responsibilities
  – Ways that users can participate
• Demonstrate KC post-award system
• Get commitment to user participation
USC’s Research Administration System

Christine Lavoie
Goals

• Simplify proposal generation, submission and management
• Improve proposal success rate due to increase in quality
• Increase accuracy
• Make it possible to grow research at USC
• Eliminate need for shadow systems
Approach

• What Must Software Do to Meet USC’s Needs for Research Administration?

• Understand Needs of All Constituencies: staff and students in departments, centers, schools, central

• Clarify Roles and Responsibilities of all research administration entities

• Reviewed by Research Administration Task Force and faculty groups

• Posted on University Website, Inviting Comments
What You Want

• Cradle to Grave System, Budget Creation to Account Close Out
• Minimize Data Entry/Pre-population of Fields
• Automatically Pull Data for Rates, Salaries, etc.
• Flexibility in Designing Approval Pathways and Budgeting Approaches
• Appropriate Security and Privacy
• System-to-System Submission
• Real-time Obligation of Expenses
More Requirements

• Portable Web Access, Single Log-in
• Around the Clock Access
• Accommodate Surges at Proposal Deadlines
• Proposal Error Checking
• Track Negotiation Process with Automatic Notifications – Visibility to Proposers
• Simplified Effort Reporting
• Automated Performance Tracking
RAS Components

- **Kuali Coeus (KC)** for pre-award and post-award proposal and award management
  - Replace eCert, SCera, PARiS
- **Click Commerce** for regulatory, ethics system
  - Retain existing iStar
  - Expand to IACUC, Lab Safety, Conflict of Interest
- Integrate KC with Kuali Financial System (KFS), Click Commerce, other systems
Project Overview & Timeline

Jennifer Love
Phased Approach

KC Implementation

Phase 1: Post-Award
Go-live Fall 2012

Phase 2: Pre-Award
Go-live Fall 2013
Phased Approach

KC Implementation

Phase 1:
Post-Award
Go-live fall 2012

Phase 2:
Pre-Award
Go-live Fall 2013
Phased Approach

KC Implementation

Phase 1:
Post-Award
Go-live Fall 2012

Phase 2:
Pre-Award
Go-live Fall 2013
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Today
Phase 1 Timeline w/Modules

- **Sept 2011 – Feb 2012**
  - Award
  - Award Budget
  - KC-KFS Linkage

- **March – June 2012**
  - Sub-award
  - Negotiations
  - iStar Interface
  - Report Tracking
  - Workflow UI

- **June – Sept 2012**
  - BIRT
  - ARRA
  - System Tests
Connected Processes, Connected Systems

**In development (Click Commerce):**
- IACUC
  - Conflict of interest
  - Controlled materials
  - Lab safety
- Effort certification
- Service center recharge

**TBD:**
- TBD

**Kuali Coeus:**
- Award, account & budget setup
- Award management
- Award close-out

**iStar:**
- IRB
- Financial transactions (spending & tracking funds)
- Billing & accounts receivable

**Kuali Financial System:**
- Reports

**Business Intelligence Tool(s):**
Module Evaluation and Development Process

- Review current USC research admin processes, data, and systems
- Determine how the KC module can meet USC functional needs

Test / review updates & provide feedback

- Determine how to implement the KC module at USC
- Create specifications for any development work needed

Design

- Perform customization work for the KC module
- Configure KC tables with USC data

Develop / Configure

- Test modified code for feature and functionality
- Validate that the KC module meets functional requirements
- Add module to Model Office

Test / Regression Test
Module Implementation
Training & Roll-out

Champion and support the roll-out of new systems

Provide insights into user community needs for training and support
KC Demo: Awards

Larry Jackson
User Roles & Responsibilities

Christine Lavoie
Project Execution

• Significant User Input Prior to Development
• Open Design Process with Opportunity for User Community to Review Specifications and Intermediate Products
• User Testing and Feedback Prior to Release
• Documentation and Training
User Roles & Responsibilities

• What the project needs from users
  – We need your commitment

• How you as users will participate
  – Participate in testing modules providing feedback on the user experience of the system, including questions, ease of use, and suggestions
  – Create the best system possible for USC

• Discussion: questions & concerns
User Group Tasks

• Participate in testing/review of KC
  – Spend time exploring KC as it has been configured and modified for USC and provide feedback
  – Provide insight on user training and documentation needed

• Champion and rally enthusiasm for the project among users
User Resources

• Model Office
  – Sample awards
  – Introductory materials

• Kuali Foundation website: www.kuali.org/kc

• Kuali Coeus at USC website: http://newsystems.usc.edu/depts/kc/

• Research Administration System Requirements: https://research.usc.edu/files/2011/06/RASRequirements_3_7_2011.pdf
Next Steps

KC Project Team
• Finalize testing and preparation of the Model Office
• Set up users with access in the Model Office
• Prepare introductory materials and training sessions

Users
• Review the RAS requirements
• Submit any initial questions about the project
• Respond when requested to participate in testing
Questions?