

Research Administrators Forum

November 10, 2011

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Session Objectives

- Communicate goals for USC systems replacement and Kuali Coeus
- Project timeline, structure, and current status
- User engagement of research community in the project
- Discussion – Q&A

Randolph Hall

Senior Vice President of Research
Office of Research

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

Components

- **Kuali Coeus (KC)** for pre-award and post-award proposal management, financials
 - Replace e-cert, Scera, Paris
- **Click Commerce** for regulatory, ethics system
 - Retain existing iStar
 - Expand to IACUC, Lab Safety, Likely Conflict of Interest
- Integrate KC with Kuali Financial System, Click Commerce, other systems

RAS Development Strategy

- Extensive user input in creation of requirements
- Engagement from all levels of users in creation of individual modules and features
- Careful “beta” testing with users prior to wide release
- Assurance that requirements are met prior to release
- Office of Research take lead in meeting user requirements

Challenges

- Approval pathways: must be customizable, flexible, resilient
- Budgeting must be simple, and able to account for great range of budget types
- System must work well during surges, prior to proposal deadlines, and must not fail
- Interface must be intuitive
- Training, help and documentation are essential

Project Overview & Timeline

Jennifer Love

KC Implementation

Phase 1:

Post-Award

Go-live Fall 2012

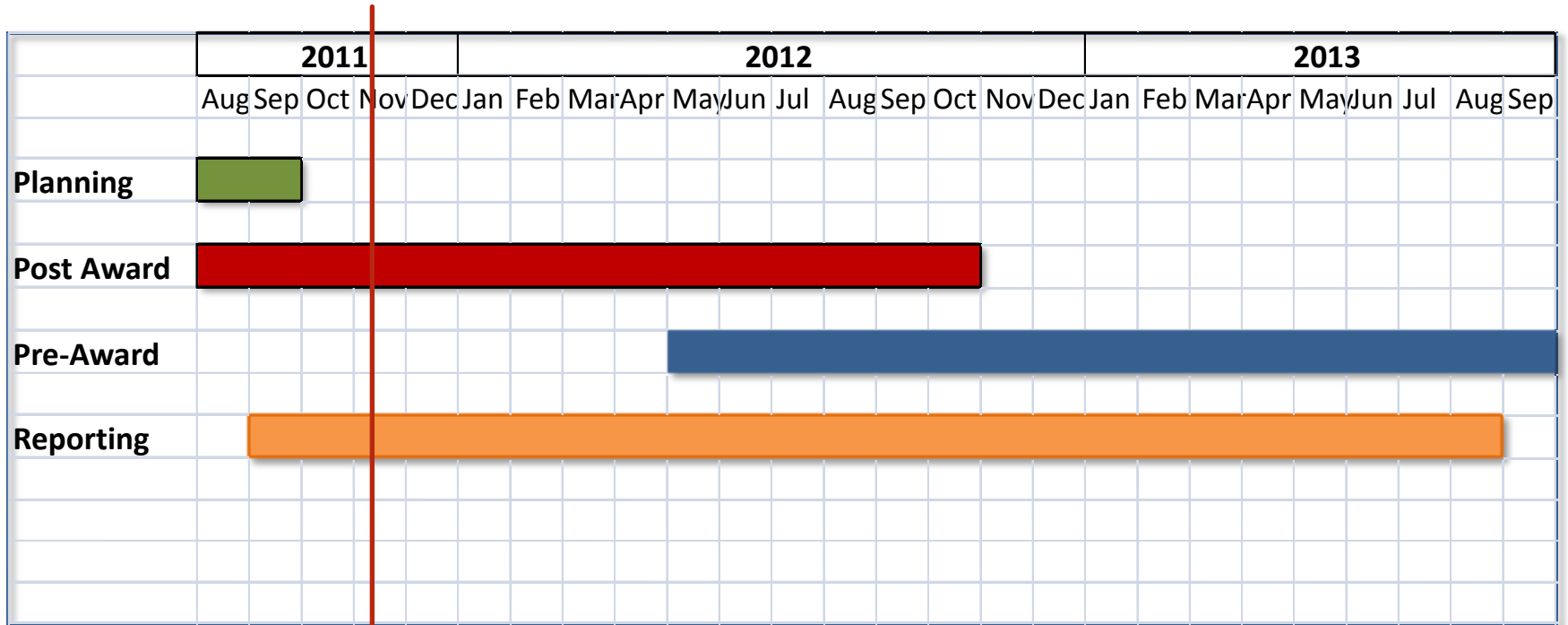
Phase 2:

Pre-Award

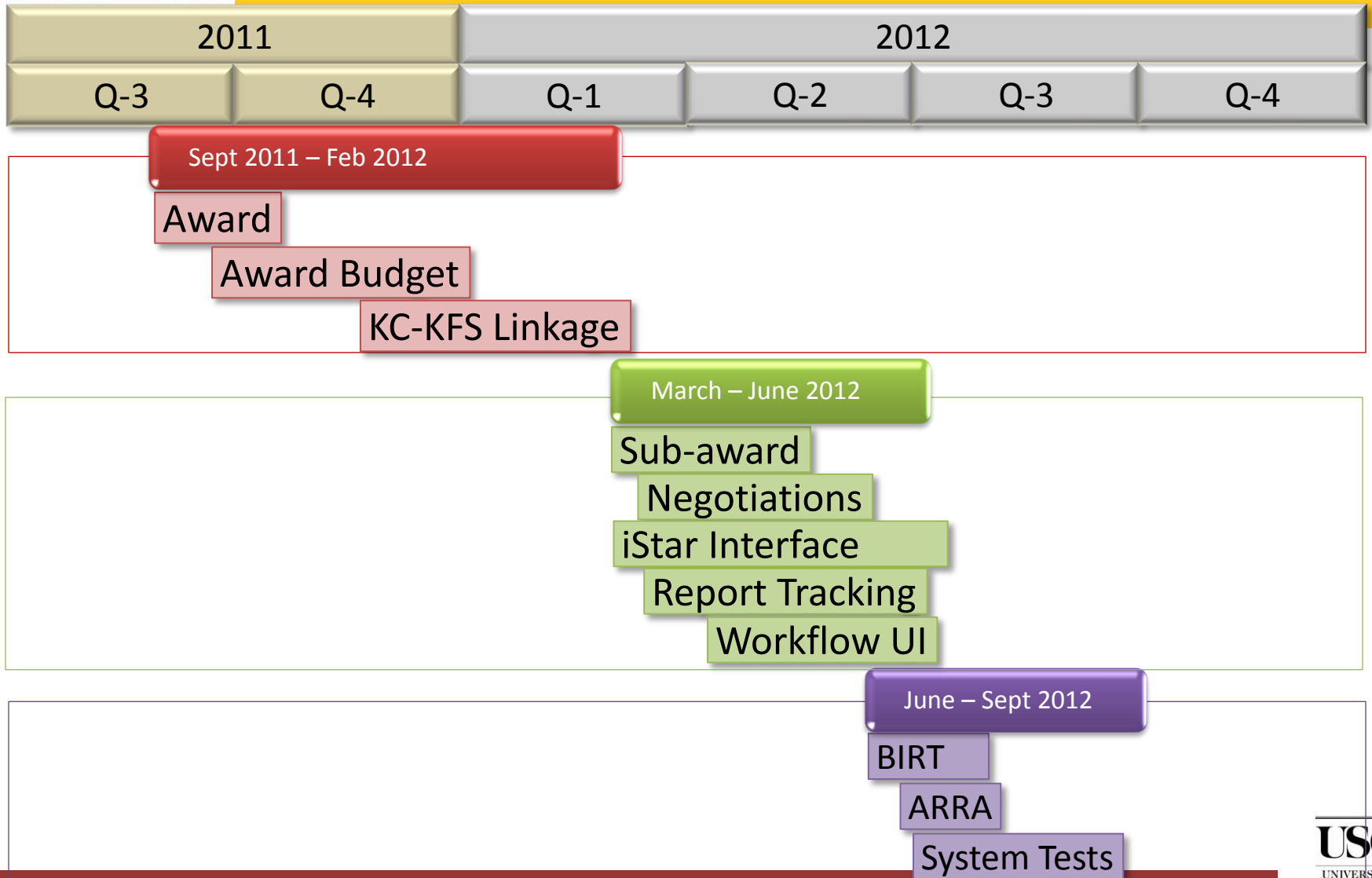
Go-live Fall 2013

Kuali Coeus Timeline

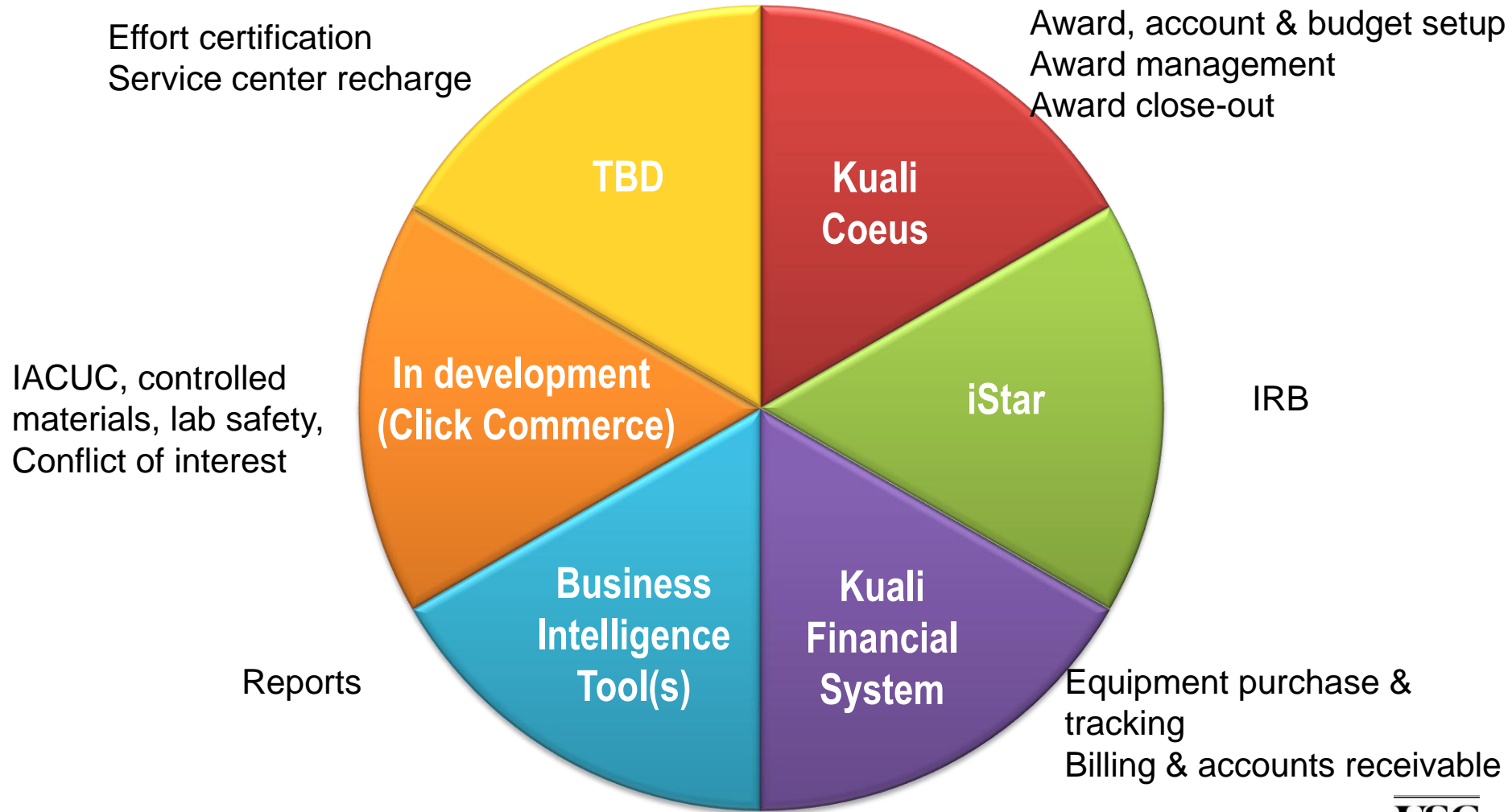
Today



Phase 1 Timeline: Modules



Connected Processes, Connected Systems



Project Status

- Project kick-off meetings were held in September
- Advisory User Group meetings were held in October
- Working Groups began meeting in October
- Integration discussions have begun with other project teams

User Participation

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
 - Provide guidance and expertise in Research Administration
 - Participate in a User Group or Working Group, Ask Questions and Provide Feedback
 - Create the best system possible for USC

Types of Working Groups

- **Functional** working groups: Small groups meet on a regular basis and focus on specific areas of research administration.
 - Develop thorough business requirements
 - Analyze how systems can support the business process(es) involved
- **Configuration** working groups: Primarily ad-hoc and one on one discussions of data needed in the system.

Working Group Tasks

- Participate in fit / gap analysis
 - Review the business processes involved in managing awards
 - Review KC and explore how current processes at USC can use current KC functionality
 - Provide review of fit / gap and requirements documents and provide feedback to BA
- Participate in requirements gathering and review
 - Communicate user requirements on behalf of the user community
- Participate in user acceptance testing
 - Review 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

Working Groups

Award /
Account
Set-up

Award
Lifecycle

Award
Accounting
Processes

Award
Reporting

Award
Closeout

Training &
Development

Working Groups Topics

Award / Account Set-up

- Award establishment
- Account establishment

Award Lifecycle

- Award changes
- Sponsor deliverables tracking
- Sub-awards / Subcontracts
- Consultants / Independent Contractors

Award Accounting Processes

- Award accounting & financial transactions
- Financial projections
- Accounts receivable & billing
- Financial reporting

Award Reporting

- Internal & external reporting
- Financial & non-financial reporting
- Pre-defined & ad-hoc reporting

Award Closeout

- Award closeout
- Account closeout
- Final reports / deliverables

Training & Development

- Identify training needs
- Create & review training materials

Working Groups Status

- Meetings began October 24
- Business processes / topics for each group have been identified
- Groups have begun documenting USC's current business processes for managing awards
- Additional Working Groups to be established in December to assist with Testing group and Training and Development Group

Project Team

Project Director
User Engagement

Tim Woodward
Christine Lavoie
Margaret Harrington

Technical Team Leads

Mark Morris
Stephanie Honda
Asbed Bedrossian
Phil Berres

Business Analysts

Bill Bowers
Jennifer Love
Larry Jackson

Discussion

Christine Lavoie

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

Kuali Foundation: www.kuali.org