

User Group Meeting

December 2, 2011

Agenda

12:00	Welcome	Christine Lavoie
12:05	Session Objectives	Christine Lavoie
12:10	USC's Research Administration System	Christine Lavoie
12:20	Project Overview & Timeline	Jennifer Love
12:30	KC Demonstration	Larry Jackson
1:15	User Roles and Responsibilities	Christine Lavoie
1:25	Discussion & Next Steps	Christine Lavoie

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

- 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

KC Implementation

Phase 1:
Post-Award
Go-live Fall 2012

Phase 2:
Pre-Award
Go-live Fall 2013

KC Implementation

Phase 1:
Post-Award
Go-live fall 2012

Phase 2:
Pre-Award
Go-live Fall 2013

KC Implementation

Phase 1:

Post-Award

Go-live Fall 2012

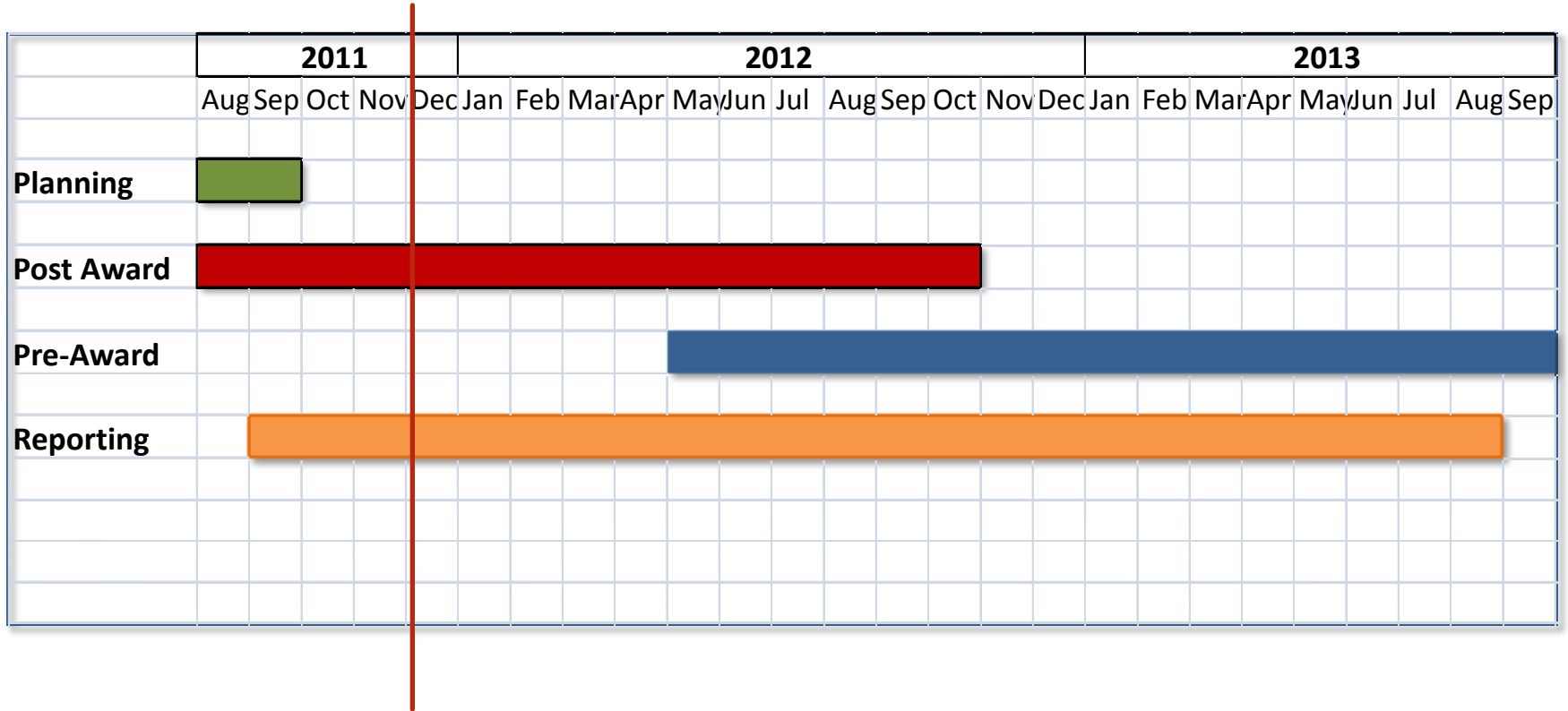
Phase 2:

Pre-Award

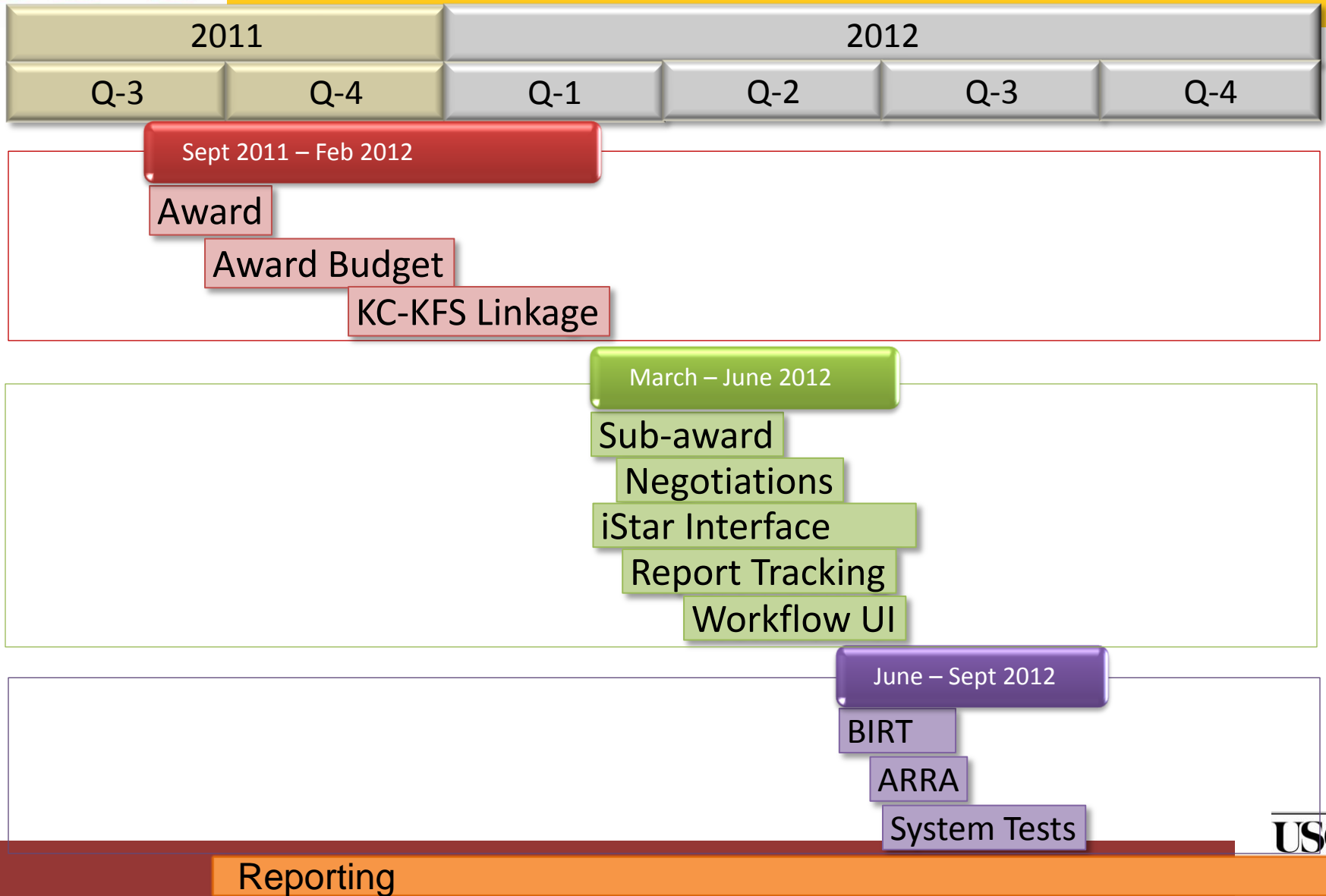
Go-live Fall 2013

Kuali Coeus Timeline

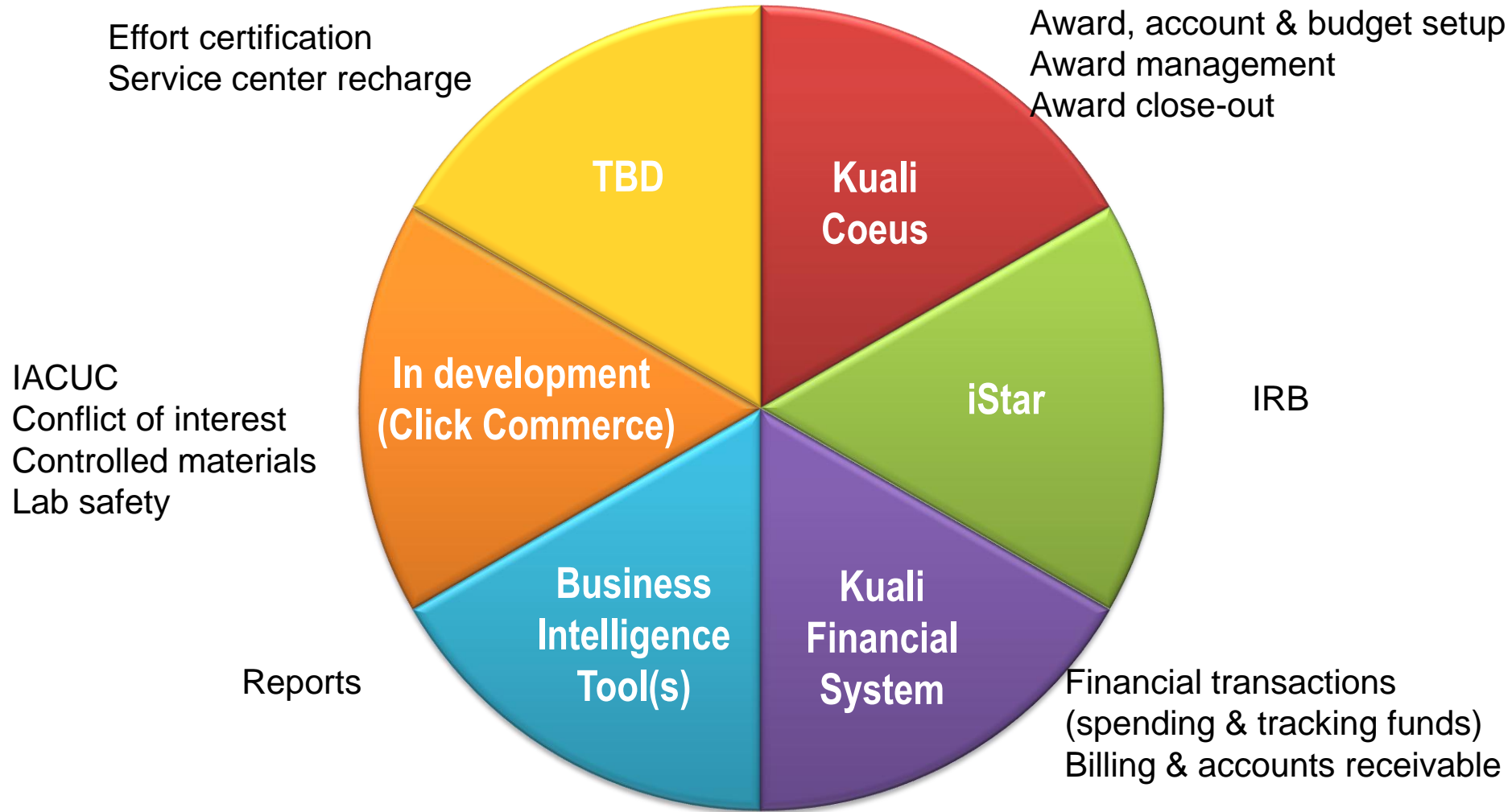
Today



Phase 1 Timeline w/Modules



Connected Processes, Connected Systems



Module Evaluation and Development Process



- Review current USC research admin processes, data, and systems

- Determine how the KC module can meet USC functional needs

- Determine how to implement the KC module at USC

- Create specifications for any development work needed

- Perform customization work for the KC module

- Configure KC tables with USC data

- Test modified code for feature and functionality

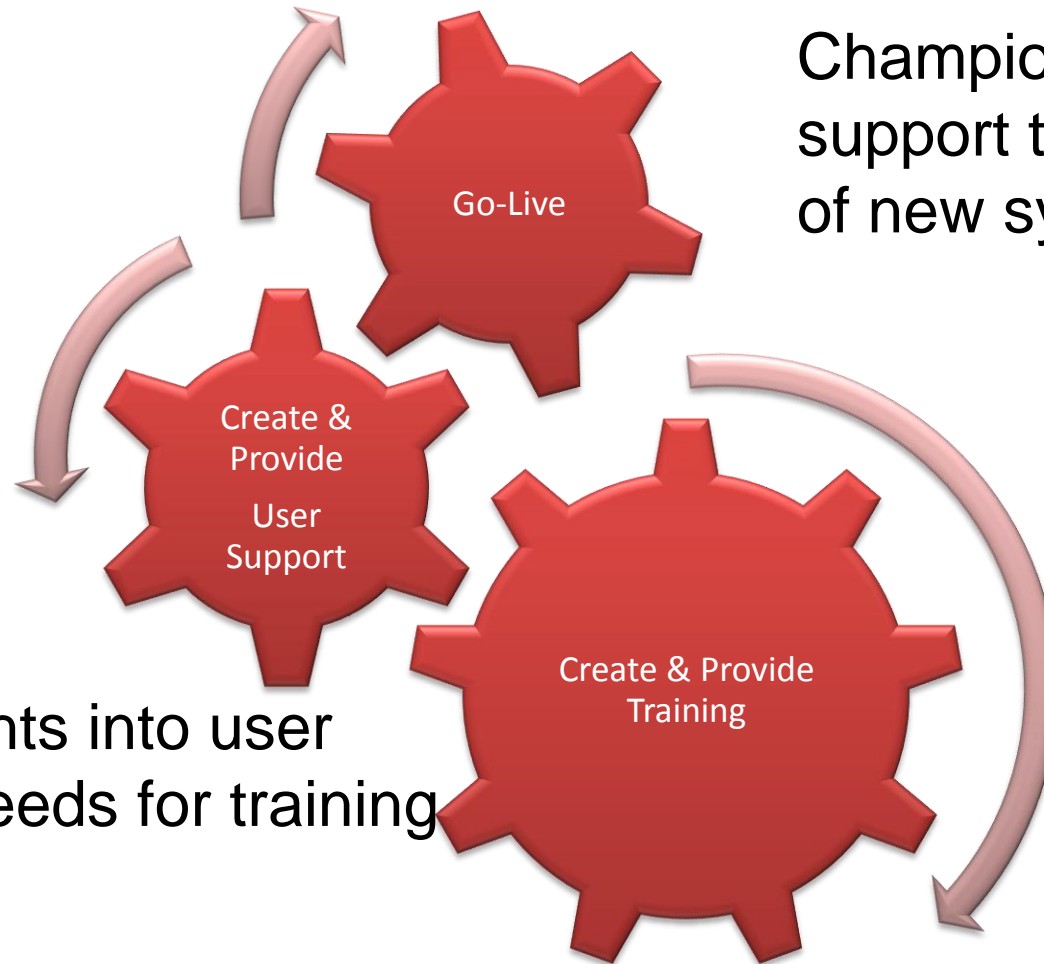
- Validate that the KC module meets functional requirements

- Add module to Model Office

Test / review updates & provide feedback



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

- 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?