TARA Presentation
Research Administrators Forum

April 3, 2013
AGENDA

TARA Overview

Business Processes
  Award and Account Setup
    Process inside DCG and SPA
    Process for schools
  Notifications

Budget Changes

Reporting

Rollout Process
Integrated suite of applications supporting the administrative needs of the research enterprise, including

- Pre-award proposal generation, routing and submission
- Post-award for account establishment, management and close-out
- Regulatory and compliance, for human subjects, animal research, lab safety, and conflict of interest
- Business intelligence for reporting and tracking research activity
Rolling Out Mid-April

• KC Post Award
• KFS Account Creation
• Reports
• FiPS (Financial Projections) beta
CORES Expansion

• CORES pilot concluding successfully
• Initial invoicing will occur in second week of April
• New cores will be enrolled over the next 6-12 weeks
• Interested cores should contact Silvia DaCosta (sdacosta@usc.edu) in the Office of Research
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Subtotal: $25.00
Subtotal: $1,660.00
Compliance Applications

• IACUC system is in production and available to users on a voluntary basis. Mandatory use will begin this summer

• Biosafety system development will be completed in April, and will be available for test in May

• Radiation safety system will be developed in May and June

• diSClose launched in August 2012
Still to Come

• Automated award and budget change processes
• Effort Certification
• Payroll Expense Transfers
• KC Pre-Award
POST AWARD BUSINESS PROCESSES

AWARD AND ACCOUNT SETUP
What’s New?

• Separation of award activity (Kuali Coeus) and financial activity (Kuali Financial System)
• DCG establishes award and posts award budget
• SPA processes all detailed budgets, including satellites
DCG Steps

Award Account & Budget Set-Up Workflow

KC
- Create and finalize Award
- Create and finalize Time and Money
- Create and finalize Award Budget (sponsor version)
- Identify account number

KFS

Notice sent to PI & Dept
• Set up award in KC
• Link detailed budgets submitted prior to award to KC award record
• Enter award budget as received from sponsor
• Determine account number
• Handoff account creation process to SPA
• Notify PI and department that award has been established
**SPA Steps**

**Award Account & Budget Set-Up Workflow**

1. Review Award Budget eDoc and Award attachments (for Final Budget)
2. Post Award Budget
   - Review and approve budget posted from KC
   - Was there a working budget?
     - No: Budget set-up complete
     - Yes: Are satellite accounts identified?
       - No: Create and approve Budget Change for working budget
       - Yes: Create Satellite Accounts with SPA

3. Notice sent to PI & Dept

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**KC**

- Review and approve Account

**KFS**

- Add SPA Code to SPA Chart for account
- Account set-up complete
Sponsored Projects Accounting

• Create account in Kuali Financial System
• Post award budget into account
• Modify budget based on detailed budgets submitted to DCG or SPA
• Establish satellite accounts and budgets as requested
• Notify PI and department when accounts are established and available for spending
PI’s and Schools

• Send detailed budgets to DCG or SPA
  – Timely submission enables efficient account and budget set-up process
  – Assure detailed budgets match actual award amount

• Each school will continue to follow its current processes for generating, approving and submitting detailed budgets
Notifications

Notification from DCG

- When award is established
- To PI and department contact
- Provide instructions for submitting detailed budgets if needed
- Provide link to KC – award record is accessible to the PI and department administrator
Notifications

Notification from SPA

- When accounts are established with detailed budgets, if submitted
- To PI, Co-PI and department contact
- Include link to KC with directions to access award record, including terms and conditions
Budget Changes During Project

• Fully automated process is in development
• During transition, budget changes may be submitted using
  – KEW General Purpose eDoc
    • Accessible from KFS Workflow menu
    • Electronic routing and tracking approvals
    • Detailed budget will be attached
  – WebBA SPA Budget Change
REPORTING
• Initial Reports
  – Account Status Summary Report (ASSR)
  – Rolling Period Reports
• Reports will be available in Cognos
• School data file for download
ROLLOUT PROCESS
Kuali Coeus

- All USC employees have basic access
- PI’s and Co-PI’s automatically have access to their awards
- “Unit” administrators request access based on program/organization code (bulk loading of initial access in progress)
- “Project” administrators request access based on account or award – process being developed
System Access

KFS

• All employees have basic access
• Account access enabled automatically to designated roles (account owner, SBO, etc.)
• User Access request form required for permission to perform specific processes or for additional account access

Cognos

• Requires defined role
• Inherits account access from KFS
Rollout Events

• Community Presentations – HSC and UPC
  – Demo of Kuali Coeus Post Award
  – Greater detail on business processes and reporting

• Account Creation and Budget Reallocation webcasts

• School-based demos and training
Questions and Comments

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