



**New Electronic Tools for Research:**  
**The Quali Coeus Implementation Project**  
**at UPR Mayagüez and Medical Sciences**

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Professor, Dept. of Chemistry UPRM  
& Coordinator UPRM Proposal Development Unit

**September 13, 2013**

# AGENDA

## □ What is Kualii?



## □ Kualii Coeus at UPRM

- Why KC?
- History of Implementation
- UPRM KC Team
- UPRM Project Charter: Proposal Development
- Features of KC



- ## □ Other electronic resources to researchers:
- CITI, SPIN, VIVO



# What is Kuali?



<http://kuali.org>

- **Kuali** is a non-profit organization.
- Represents a community of universities and enterprises with a common vision:
  - Open access systems, modular, and distributed
- To develop and maintain ***software for Higher Education*** made by institutions of higher education.
- Made for institutions of all sizes, from “*land-grant research institutions*” to “*community colleges*”.

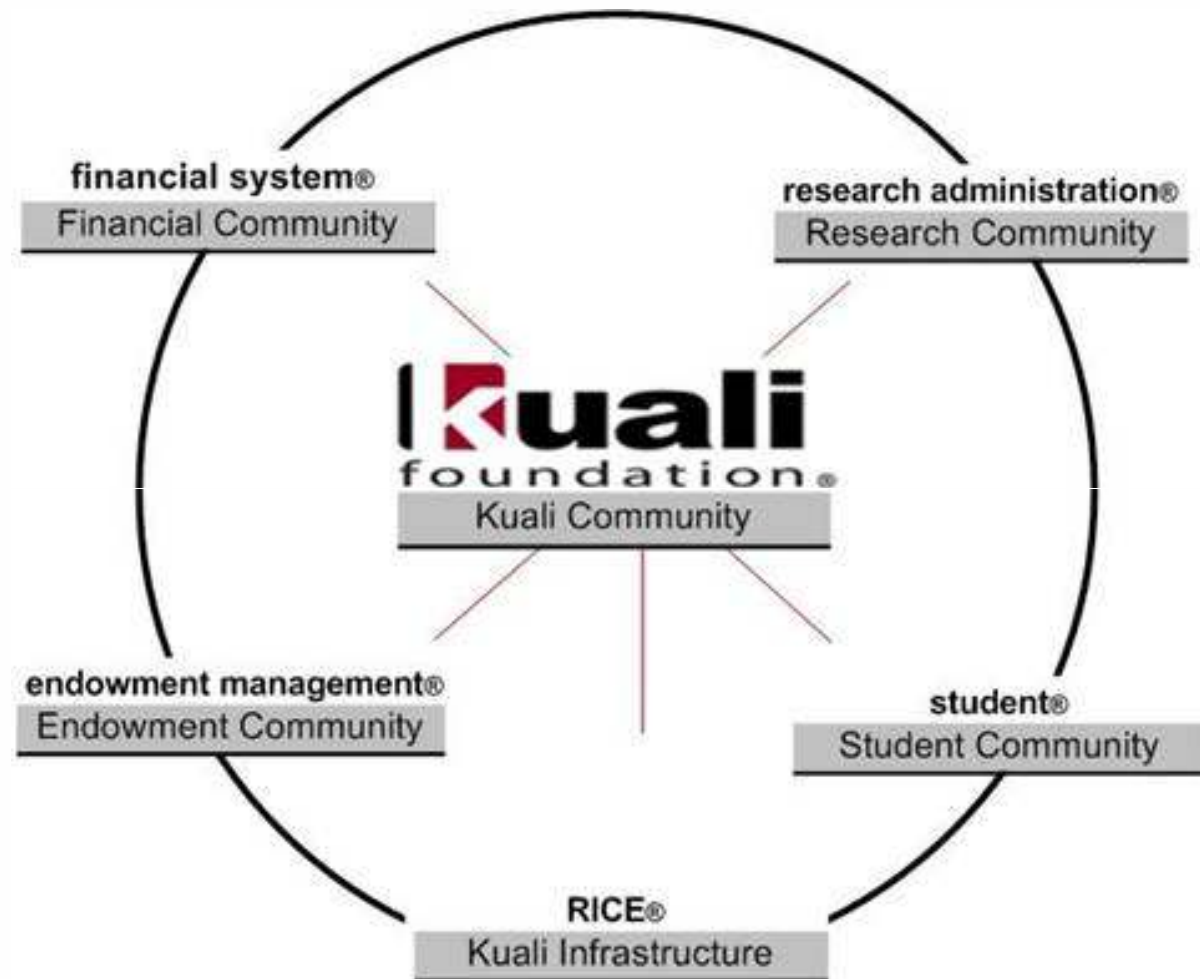
# Some Kualii Members



## KUALI SOFTWARE

1. RICE
2. Financial System (KFS)
3. **COEUS (KC)**
4. MOBILITY (KM)
5. OPEN LIBRARY ENVIRONMENT (KOLE)
6. PEOPLE MANAGEMENT (KPM)
7. READY
8. STUDENT (KS)

# Kuali Systems





# History of UPR KC Implementation

- April – June 2012: Meetings with UPRM and UPR officials on e-Research needs
- **June 26, 2012:** Proposal to UPR Central Admin  
*“KC Implementation at UPRM and MSC”*
- August 2012: Recruited Omar Soto, GS as Tech/Developer
- Sept 25, 2012: Meeting with Indiana U (IU) Staff
- **October 2012:** Proposal Approved; Attended Quali Days 2012





# History Continues...

- October – December 2012: Familiarization with KC's Proposal Development Module – Workflow, Customization.
- **December 18, 2012** – rSmart Visit to UPRM
- February 2013: Consulting Agreement with rSmart signed.
- **April 2013:** Three (3) On site evaluations & consulting visits (on Functional, Technical & Project Management issues)
- **May 2013:** Project Kickoff



# UPRM Quali Coeus (KC) Team

## **Project**

### **Directors:**

- Walter F. Silva
- José L. Cuevas

## **Project**

### **Managers:**

- Dr. Marisol Vera
- Darío Torres

**\* Team Leaders**

**Technical Team:** Pablo Rebollo\*,  
Omar Soto (Developer)

**Functional Team:** Darío Torres\*,  
Marisol Vera, Evelyn Albino (ORE)

**Training:** Evelyn Albino\*

**Testing (QA):**  
Marelix Marrero\*, Nora Soto\*

**Help Desk:** Rafael Omar Ruiz\*

**Communications:** Marisol Vera\*





**K**uali Coeus

**PORTICO**

at

**UPRM**

# **Introduction to Quali Coeus (KC) 10 Good Reasons to Install KC**

***Pablo Rebollo & José L. Cuevas  
UPRM IT***

**May 21, 2013**



# Reasons to Install Kuali Coeus

- Standardizes and increases the efficiency and accuracy of grants administration, including research accounting
  - Reduces cost of administering grants over time
  - Reduces liability to the University and investigators
- Reduces paper usage and costs (of proposal writing and post-award processes)
  - contribute to slowing global climate change.



# 10 Good Reasons to Install Kuali Coeus Proposal Development

1. Saves time in circulating proposals (**internal proposal routing**)
2. **Increases accuracy of proposals & its records**
3. Provides a **single location** for all proposal and grant information
4. Provides controlled **access via web**
5. **Allows e-submission (e.g. Grants.gov)** - Easier to conform to automated systems over time
6. **Eases resubmissions** – former proposals easily accessible & copied



## (Cont.) 10 Good Reasons to Install Kuali Coeus Proposal Development

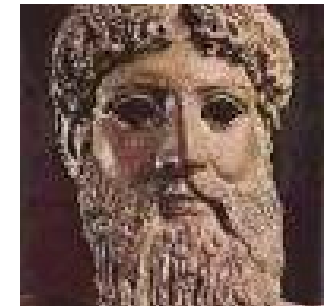
7. **Allows for compliance tracking** (Conflict of Interest system; IRB, IACUC requirements)
8. Provides a **negotiation module –to track and document proposal changes (Negotiation Module)**
9. Simplifies **creation of Post Award (Grant) Records** – due to available proposal records
10. **Eases post-award administration (*upon Award Module implementation – future phase*)**

# What is Kuali Coeus?



- Cradle-to-grave research administration system, based on MIT's Coeus and supports:
  - **Pre-award (proposals, budgets, Grants.gov)**
  - Post-award (contracts, grants, negotiations, report tracking, subcontracting)
  - Research Compliance (IRB, IACUC, FCOI)
- Uses a single database; allows integration among modules/campus stakeholders
- Can be linked with financial systems (eg. Kuali Financial or others)

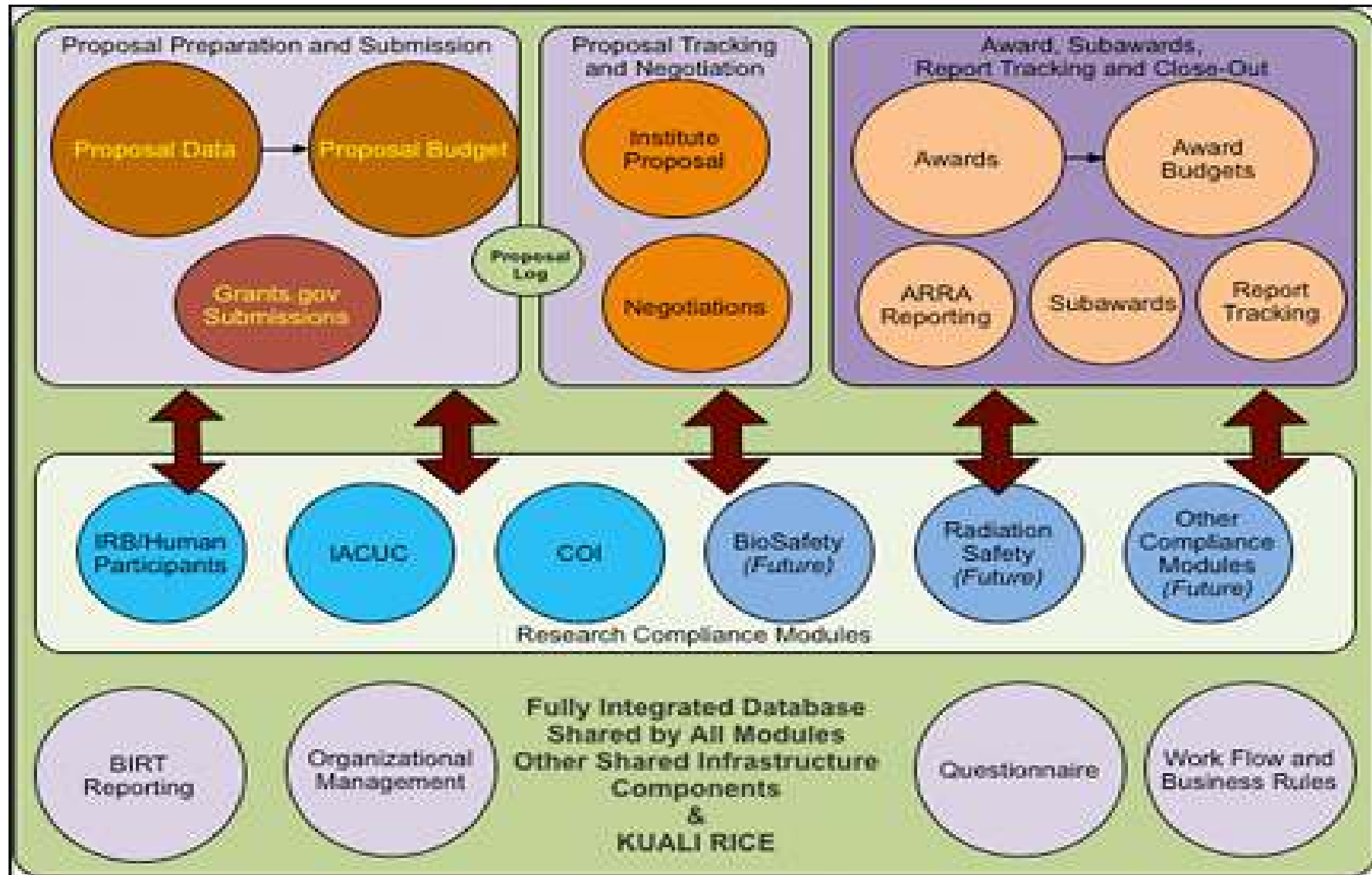
*Coeus*



*The Greek Titan of Intelligence*

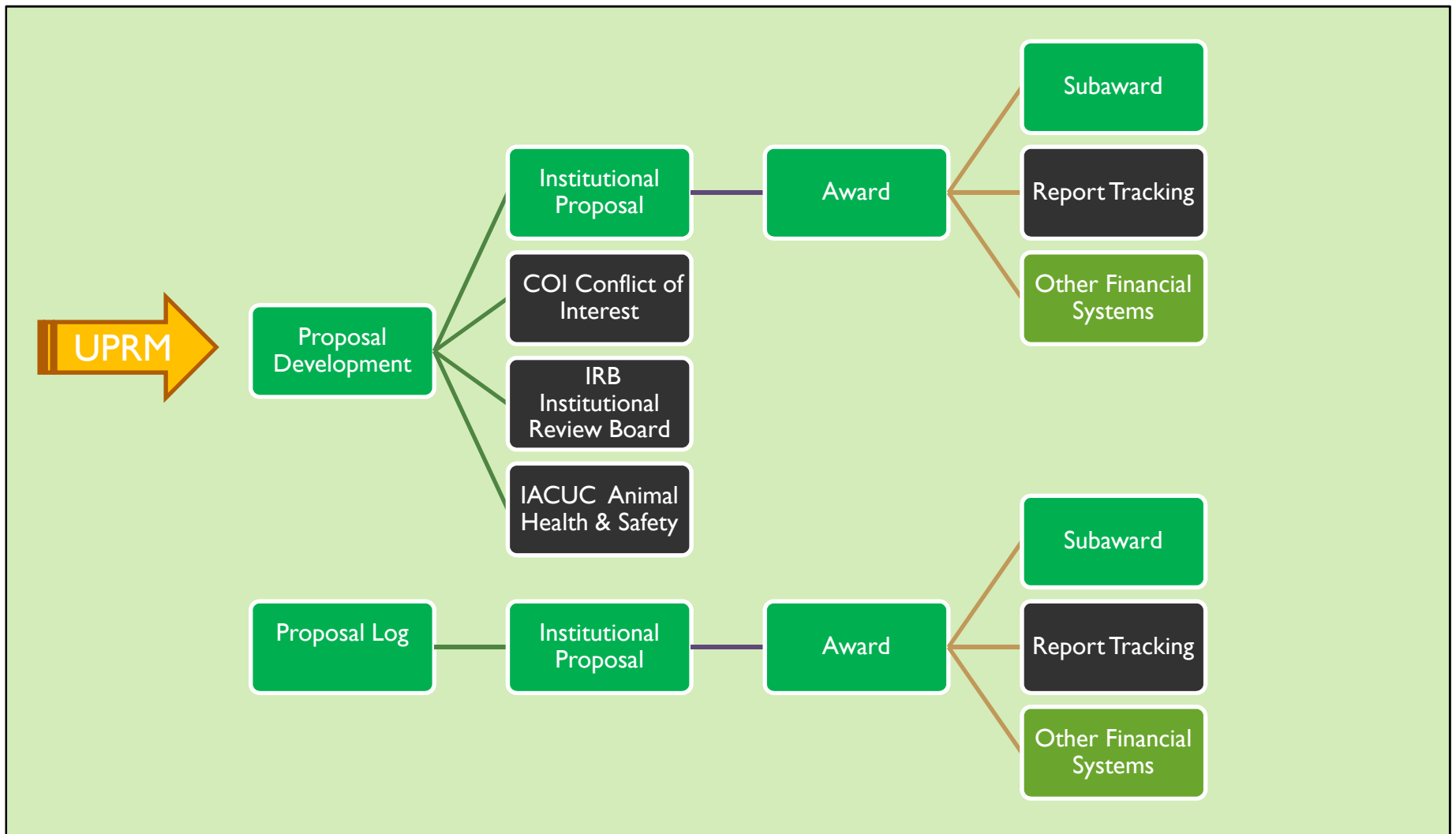
# Kuali Coeus (KC)

## Electronic Research Administration Module



# Kuali Coeus Modules / Process Flow

(Green = Contract and Grants Office Black = Compliance)







# **Kuali Coeus at UPRM & UPRMS Project Charter & Timeline**

*Dr. Walter F. Silva & José L. Cuevas, Project PI's  
Dr. Marisol Vera & Dario Torres, Project Managers*



# Project Charter

## UPRM KC Implementation Project Charter v3.docx

### Charter Statement

*The Kuali Coeus Implementation Project will install a full version of the Kuali Coeus Software for use as the Research Administration System of record at the University of Puerto Rico Mayagüez and University of Puerto Rico Medical Sciences.*

### Project Scope

UPRM will concentrate on the following Kuali Coeus modules:

- ✓ Proposal Development Module
- ✓ Proposal Budget
- ✓ Proposal Log
- ✓ Institutional Proposal
- ✓ Negotiations

Phase I: UPRM (a. R&DC; b. EEA/SEA) Phase 2: UPR-MS



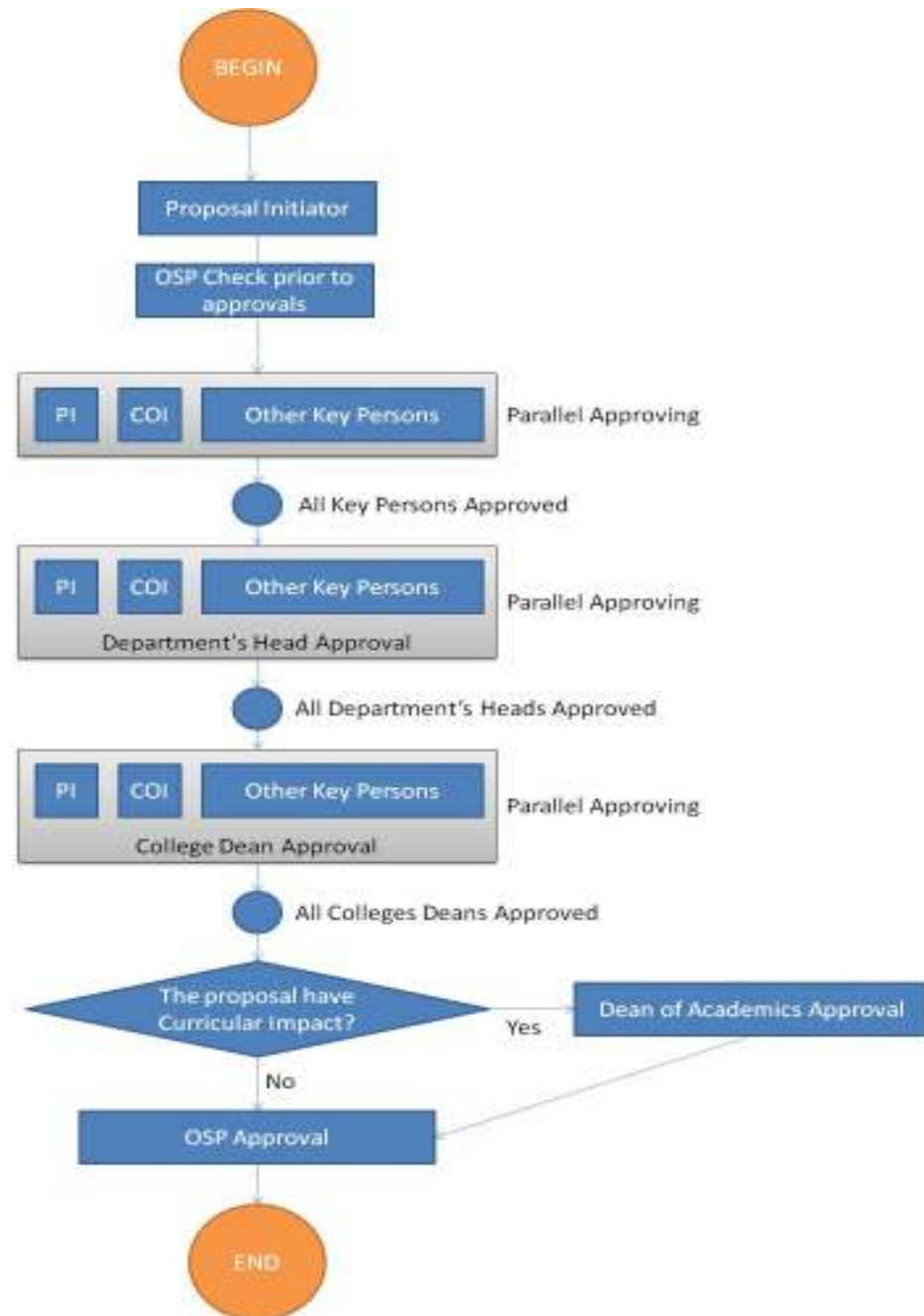
# Project Timeline (*proposed*)

Tasks	Apr	May	Jun	July	Aug	Sept	Oct	Nov
rSmart On Site Visits	X							
Environment Set up		X						
Customizations		X						
System Parameter Set up			X	X				
Rice, Prop Dev Configuration		X	X	X				
Testing & Training Plans		X						
QA Testing and Model Office					X	X		
Initial User Training						X		
Continue Training, Support, Help Desk						X	X	
GO LIVE PD Phase I								X

# UPRM KC Implementation - Working Test Bed



- **Proposal Development Module**
  - *Workflow*
  - **Tables**



• <https://kualidev.uprm.edu>

• <https://kualitraining.uprm.edu>

• <https://kualiprod.uprm.edu>

The screenshot displays the Kualitraining web application interface. At the top left, there is a logo for 'Kuali Coeus' and 'UPRM'. The navigation bar includes roles: 'Researcher', 'Unit', 'Central Admin', 'Maintenance', and 'System Admin'. A user is logged in as 'marisolvera'. The main content area is divided into several sections:

- Proposals:**
  - Create Proposal
  - Proposals Enclosed
  - All My Proposals
  - Create Proposal for Grants.gov Opportunity
- Lists:**
  - Search Proposals
  - Search Proposal Log
  - Search Institutional Proposals
- Awards:**
  - Awards in Progress
  - All my Awards
- Negotiations:**
  - All My Negotiations
- IRB Protocols:**
  - Actions:**
    - Create IRB Protocol
    - Amend or Renew IRB Protocol
    - Notify IRB on a Protocol
    - Request a Status Change on a IRB Protocol
  - Lists:**
    - Pending Protocols
    - Protocols Pending PI Action
    - Protocols Pending Committee Action
    - Protocols Under Development
    - All My Protocols
    - Search Protocols
    - All My Reviews
    - All My Schedules
- Conflict of Interest:**
  - Your Annual Disclosure is due.
  - My Financial Entities:**
    - Financial Entity
    - View/Edit Financial Entities
    - All My Financial Entities
  - My Disclosures:**
    - Master Disclosure
    - Create Annual Disclosure
    - Create Manual Disclosure
    - New Project Disclosures To Complete
    - Update Master Disclosure
    - All My Disclosures
- Quicklinks:**
  - Go Pessimistic Lock
  - Grants.gov Opportunity Lockout
  - Change Password
  - Reporting
- Personnel:**
  - Degree Information
  - Current & Pending Support
  - Bio-sketches
  - All my Training
- Workflow:**
  - Preferences

# 8 Required Fields to Create a Proposal

Proposal Development Document Backdoor ID admin is in use

Doc Nbr:	1392	Status:	In Progress
Initiator:	ayubnaboa	Created:	12:34 PM 08/28/2013
Sponsor Name:	HHS - National Institutes Of Health	PI:	MARISOL VERA COLON

[Proposal](#) | [SIS](#) | [Key Personnel](#) | [Special Review](#) | [Custom Data](#) | [Abstracts and Attachments](#) | [Questions](#) | [Budget Versions](#) | [Permissions](#) | [Proposal Summary](#) | [Proposal Actions](#) | [Media](#)

[expand all](#) | [collapse all](#)  
 \* required field

**Required Fields for Saving Document** + help

<b>Required Fields for Saving Document</b>	
Proposal Number: 20	* Sponsor Code: 000340 HHS - National Institutes Of Health
* Proposal Type: New	* Project Start Date: 04/01/2014
* Lead Unit: RU-RU - UNIVERSITY OF PUERTO RICO AT MAYAGUEZ	* Project End Date: 03/31/2017
* Activity Type: Institutional Resources/Enhancement Projects	
* Project Title: Bred Institutionalization and Sustainability of a Proposal Development Unit at the University of Puerto Rico Mayaguez	

**Institutional Fields Conditionally Required**

Award ID:	
Original Institutional Proposal ID:	

[+ show](#) Sponsor & Program Information | [+ show](#) Organization/Location | [+ show](#) Delivery Info | [+ show](#) Keywords





[save](#) | [refresh](#) | [close](#)

From this portal you have access to many applications and services offered over the internet.

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[Quali Coeus](#)
[VIVO](#)

## PORTICO: Portal de Investigación Colegial

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Firefox automatically sends some data to Mozilla so that we can improve your experience. [Choose What I Share](#)



# ELECTRONIC RESOURCES FOR RESEARCH SUPPORT

## Got an idea? Need funding?

infoEd | SPIN\*

- Custom funding alerts
- Save searches
- Public, Private & International Sponsors

## Need Compliance Training?



- Responsible Conduct of Research (RCR)
- Human Subjects Research (IRB)
- Animal Use and Care (IACUC)
- Export Control

## Need Collaborators?

VIVO

connect • share • discover

**Coming Soon!**

# infoEd SPIN:

<http://infoedglobal.com/solutions/grants-contracts/spin-funding-opportunities/>

The screenshot displays the infoEd Global website interface. At the top, a dark navigation bar contains the text "CLIENT LOGIN TO:" followed by links for "SPIN", "GENIUS", "ICAG", and "ITEMS", and a close button (X). Below this is the infoEd GLOBAL logo and two buttons: "Client Login" and "Request Information". A secondary navigation bar includes links for "About InfoEd Global", "Services", "Education", "News & Events", and "Contact Us".

The main content area features a "Solutions" menu with sub-items: "SPIN Global Suite", "Grants & Contracts", "Research Compliance", "Clinical Trials", "Animal Facilities", "Research Outputs", and "Technology Transfer". Below this is a "Who Benefits from InfoEd" section with a "Send to a Colleague" button.

The "Grants & Contracts" section is highlighted, showing a list of sub-items: "SPIN Funding Opportunities", "Pre-Award", "Post-Award", and "Financial Tracking".

The "SPIN Funding Opportunities" page content includes the heading "SPIN Funding Opportunities" and the sub-heading "The World's #1 Funding Opportunities Database". The text describes the database as a solution to the inefficiency of searching multiple sponsor databases and paper-based methods. It highlights that SPIN is web-based, easy to use, and offers active searching, automated opportunity matching, and daily notifications.

On the right side, there are sections for "Related Pages" (Pre-Award, Grants & Contracts, Education) and "Client Sites" (SPIN Funding Database, GENIUS Login).

# WWW.CITIPROGRAM.ORG



USA - English

Text Size: A A

Marisol Vera ID: 1393329 | [Main Menu](#) | [Logout](#) | [Help](#)

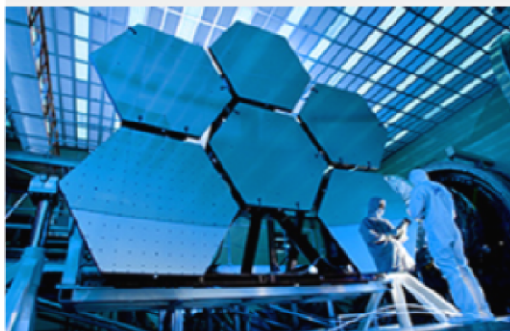


Collaborative Institutional Training Initiative  
at the University of Miami

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Access requires registration as an affiliate of a subscribing CITI Institution or as an unaffiliated learner.

## CITI Program Announcements

- [Good Clinical Practice Guide Now Available \(September 2013\)](#)
- [Using the New CITI Program Website \(August 2013\)](#)
- [CITI Program Quarterly Newsletter \(July 2013\)](#)
- [Updated Responsible Conduct of Research Content \(June 2013\)](#)
- [New Human Subjects Research Refresher Courses \(April 2013\)](#)
- [CITI Program Quarterly Newsletter \(March 2013\)](#)
- [New Module for Site Administrators: Using CITI Program Content \(February 2013\)](#)
- [Are You Thinking About Participating in a Research Study? Read CITI's Module for Research Participants \(January 2013\)](#)

\*\*\*

## Help & Support

- [How do I register?](#)
- [Merge duplicate accounts](#)
- [I forgot my Username or Password](#)
- [More...](#)

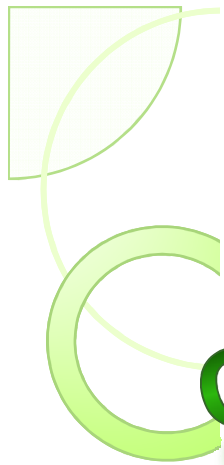
# VIVO

- **VIVO, an open-source system created at Cornell, is expected to become the UPRM institutional resource for research profiling.**
- ...will help faculty, researchers and students discover interests and make connections, using what is called an 'entity-relationship ontology model' to organize and present information on people research and education activities.
- "... is populated with information about researchers, allowing them to highlight areas of expertise, display academic credentials, visualize academic networks and display information such as publications, grants, teaching, service, and more.
- ... information can be programmatically imported from data sources such as institutional records, local repositories, bibliographic and grant databases.

Ref. About Vivo:

[http://www.vivoweb.org/files/presentations/I2ws4/IntroToVIVO\\_AdoptionOutreach.pdf](http://www.vivoweb.org/files/presentations/I2ws4/IntroToVIVO_AdoptionOutreach.pdf)

(Accessed Feb. 13, 2013)



**COMING SOON...**

**VIVO.UPRM.EDU**

The screenshot shows the VIVO website interface. At the top left is the VIVO logo with the tagline "connect + share + discover". To the right of the logo is a search bar with a "Search" button. In the top right corner, there are links for "Index" and "Log in". Below the logo is a navigation menu with links for "Home", "People", "Organizations", "Research", and "Events". The main content area is divided into two columns. The left column has a "Welcome to VIVO" section with a description of the tool and a "Search VIVO" section with a search bar and "Search" button. The right column has a "Log in" section with a "Log in using UPRM credentials" button, an "or" separator, and a "Log in using your VIVO account" section with "Email" and "Password" input fields and a "Log in" button.



The Current  
Challenge:

Doing More  
with Less  
(Can we do it  
without proper  
electronic  
resources?)

National Council of  
University Research  
Administrators  
(NCURA)

