New Electronic Tools for Research:

The Kuali Coeus Implementation Project at UPR Mayagüez and Medical Sciences

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September 13, 2013

AGENDA

- What is Kuali?

- Kuali 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

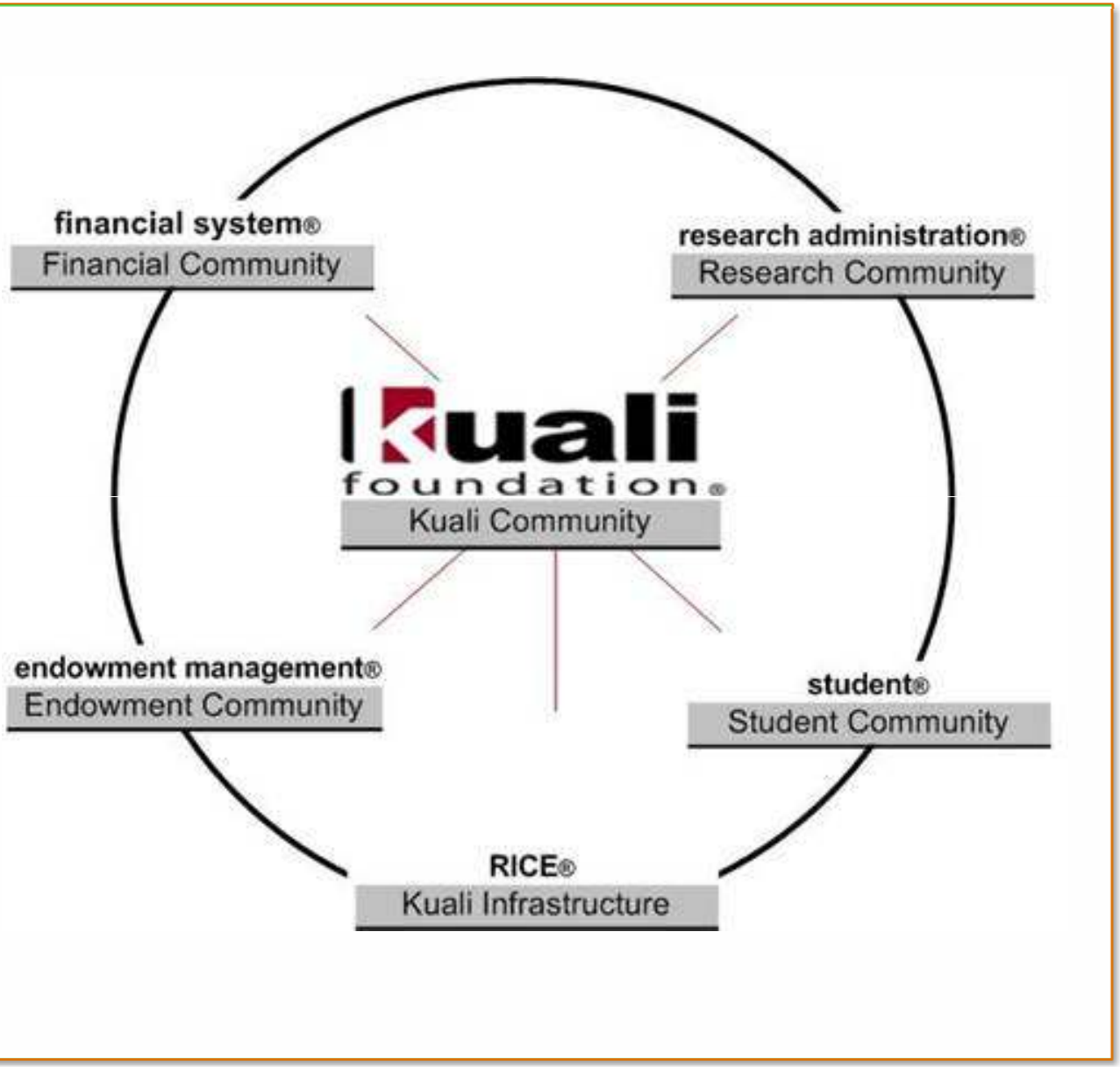
- **Kuali** is a non-profit organization.
- Represents a community of universities and enterprises with a common vision:
  - Open access systems, modular, and distributed
- To develop and maintain ***software for Higher Education*** made by institutions of higher education.
- Made for institutions of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

Some Kuali Members

Kuali Systems

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)



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 Kuali 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 Kuali 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*

PORTICO at UPRM

Kuali Coeus

Introduction to Kuali 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

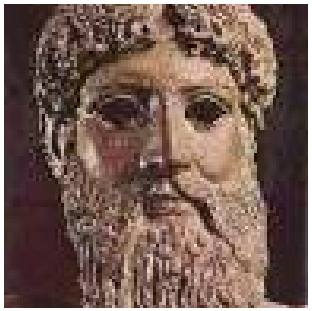
(Cont.)10 Good Reasons to Install Kuali Coeus Proposal Development

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)

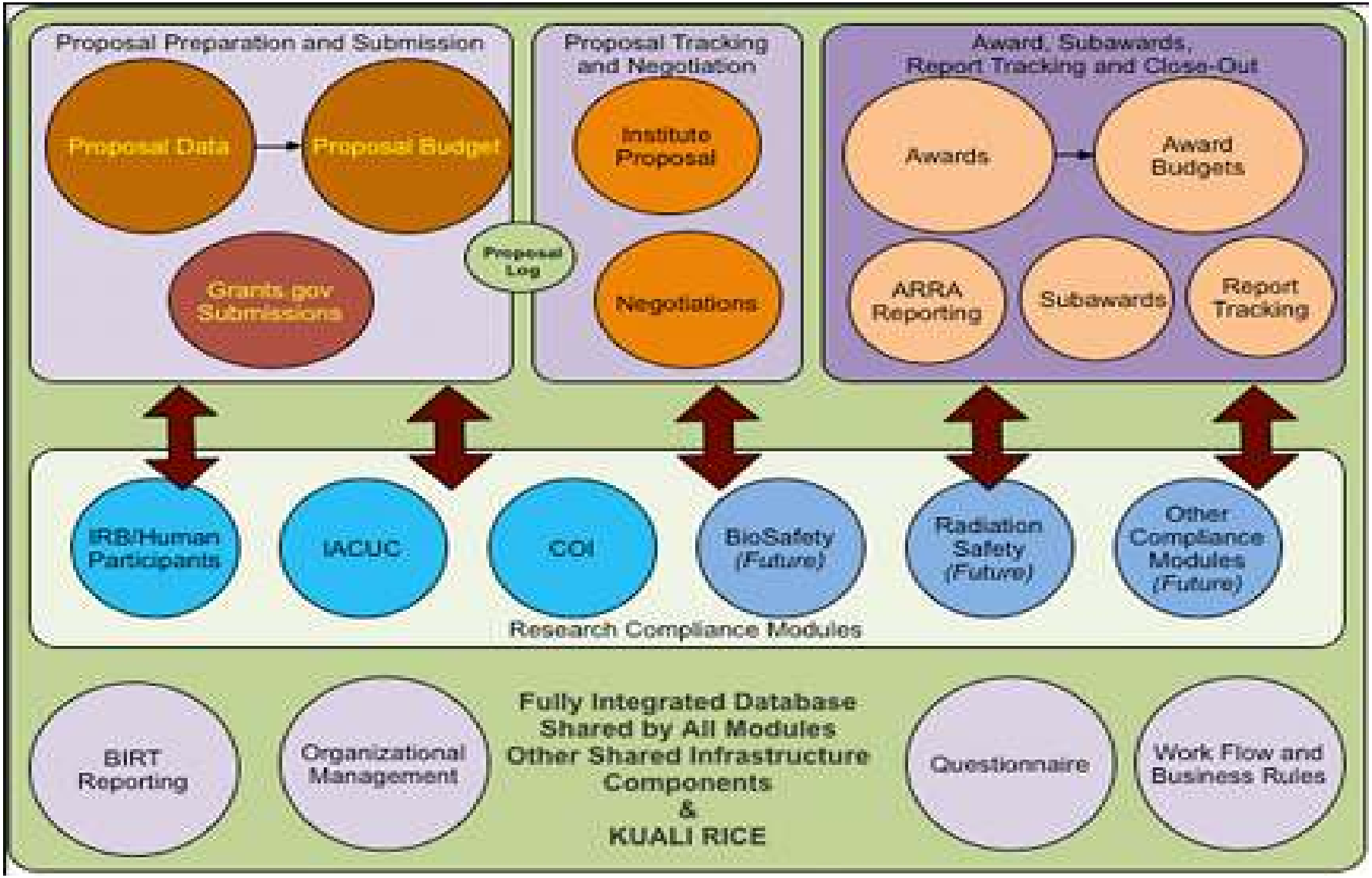
Coeus



The Greek Titan of Intelligence

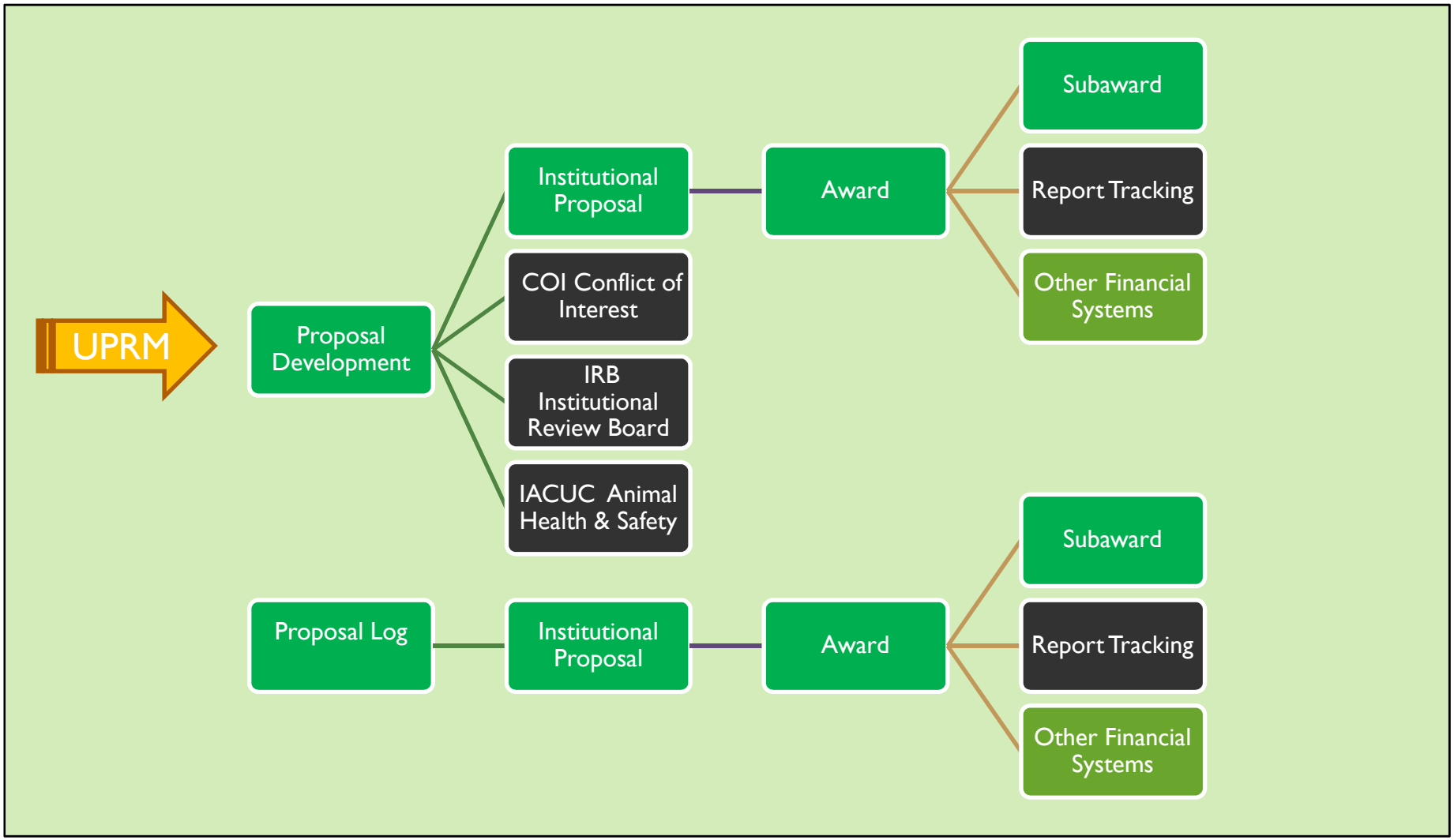
Kuali **Coeus** (KC)

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

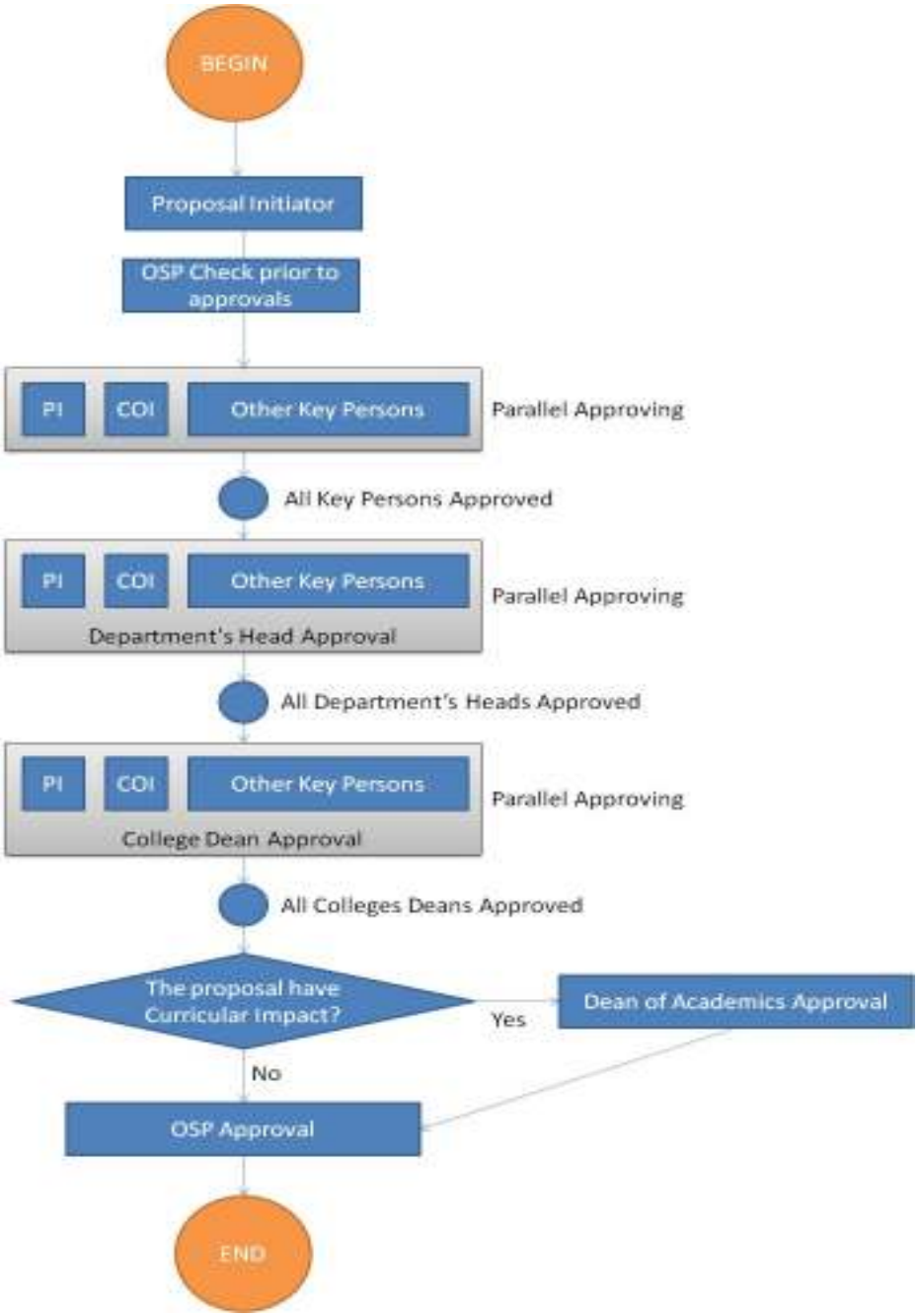
Phase 1: UPRM (a. R&DC; b. EEA/SEA) Phase 2: UPR-MS

Project Timeline *(proposed)*

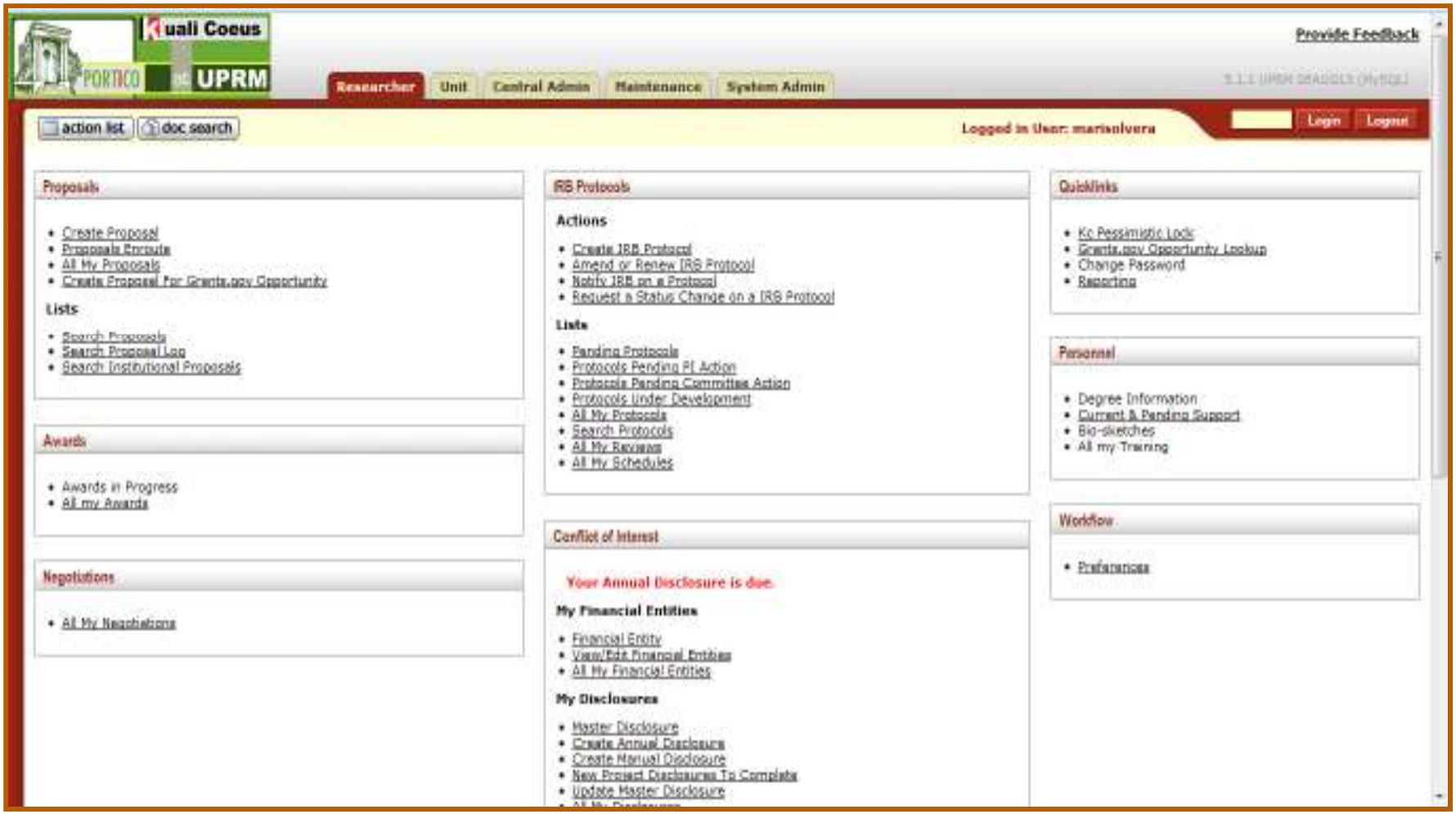
Tasks	Apr	May	Jun	July	Aug	Sept	Oct	Nov
rSmart On Site Visits	X							
Environment Set up		X						
Customizations		X						
System Parameter Set up			X	X				
Rice, Prop Dev Configuration		X	X	X				
Testing & Training Plans		X						
QA Testing and Model Office					X	X		
Initial User Training						X		
Continue Training, Support, Help Desk						X	X	
GO LIVE PD Phase 1								X

UPRM KC Implementation - Working Test Bed

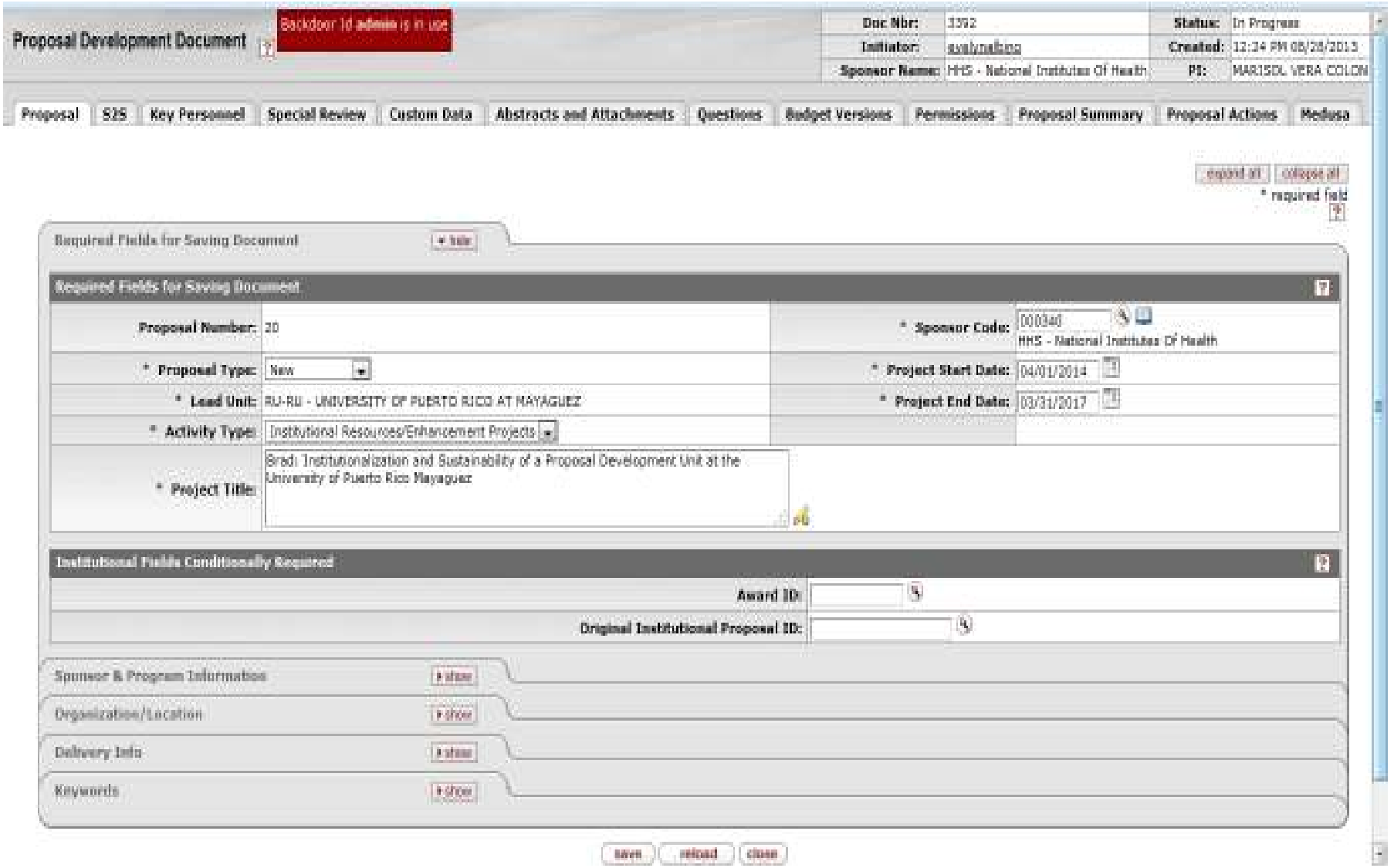
- **Proposal Development Module**
  - ***Workflow***
  - **Tables**

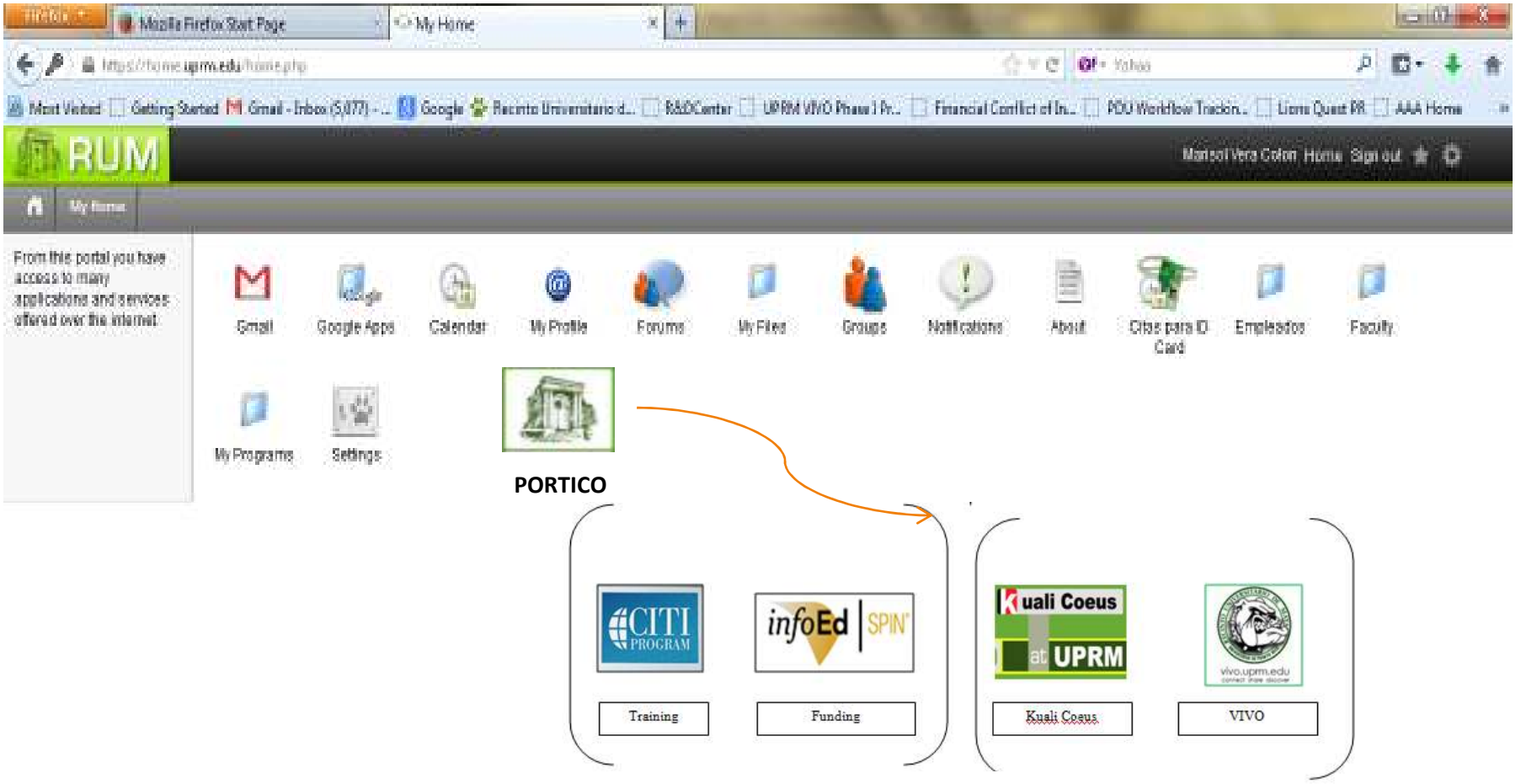


- https://kualidev.uprm.edu
- https://kualitraining.uprm.edu
- https://kualiprod.uprm.edu

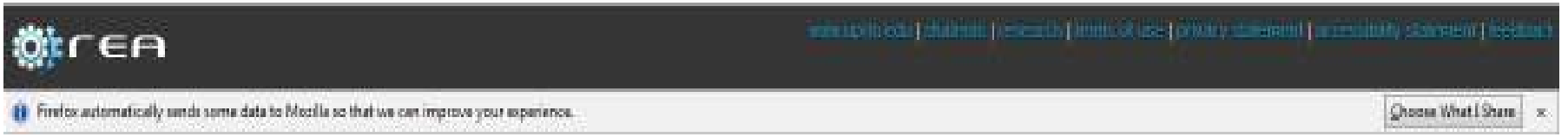


8 Required Fields to Create a Proposal





PORTICO: Portal de Investigación Colegial



ELECTRONIC RESOURCES FOR RESEARCH SUPPORT

Got an idea? Need funding?

infoEd | SPIN®

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

Need Compliance Training?

CITI Collaborative Institutional Training Initiative

- 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/

WWW.CITIPROGRAM.ORG

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.

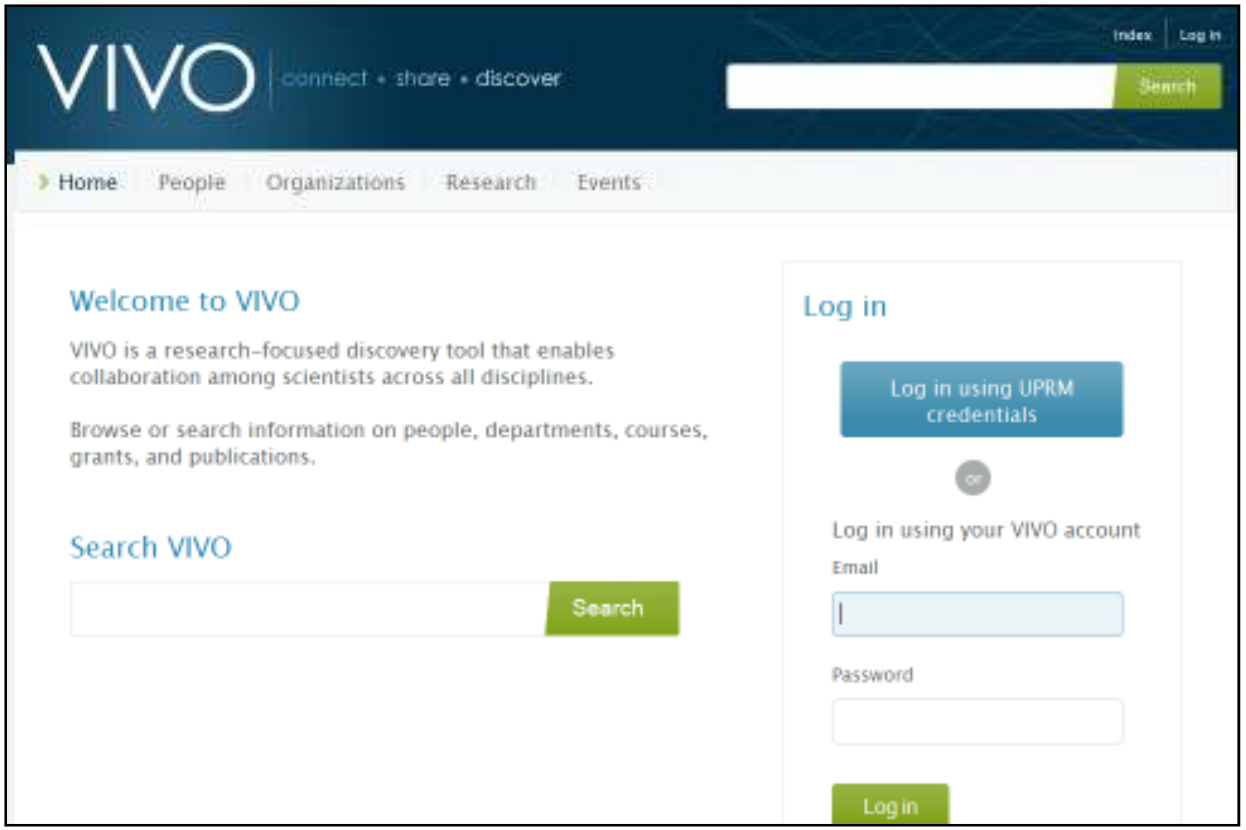
Ref. About Vivo:

http://www.vivoweb.org/files/presentations/12ws4/IntroToVIVO_AdoptionOutreach.pdf

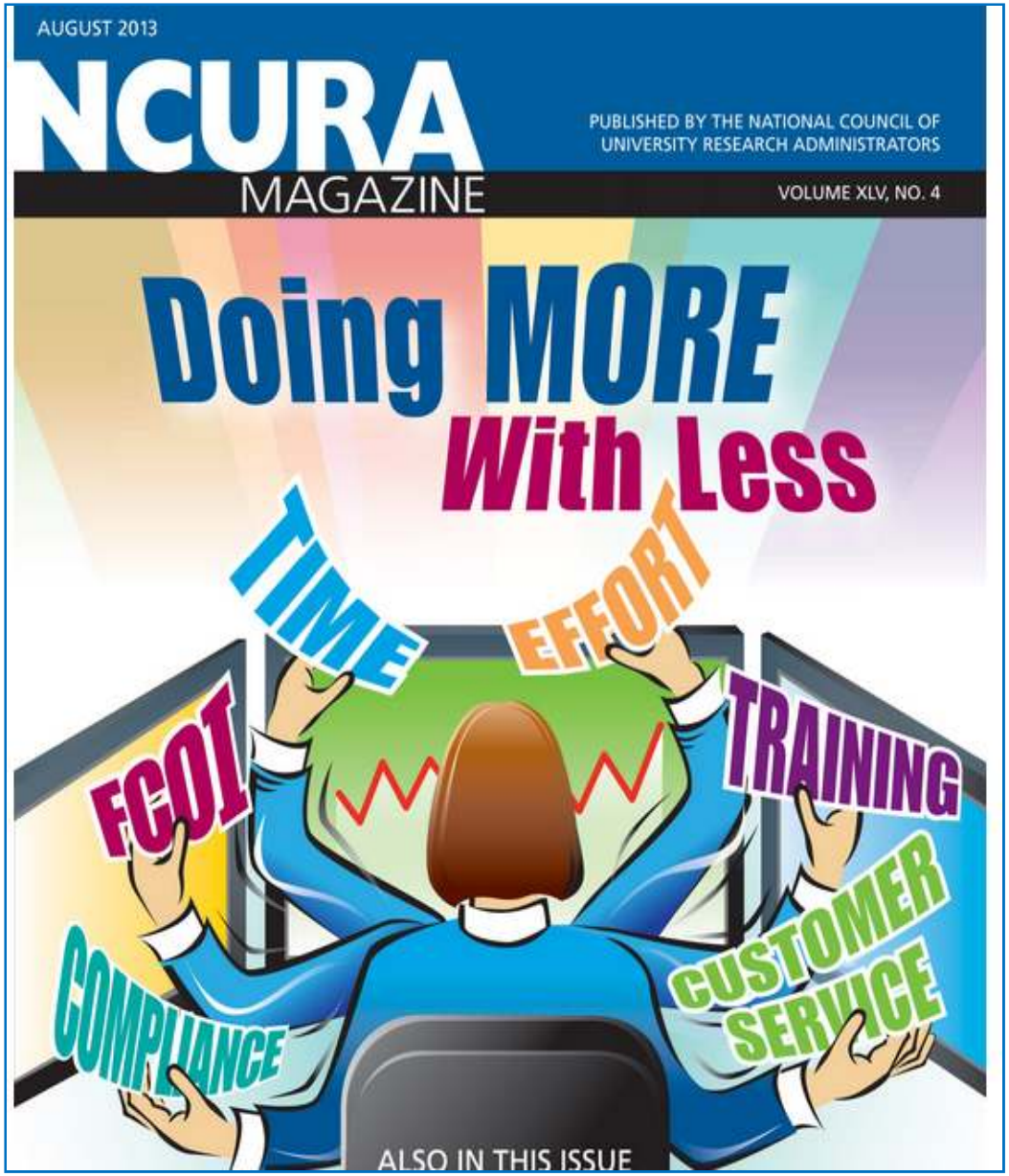
(Accessed Feb. 13, 2013)

COMING SOON…

VIVO.UPRM.EDU



The Current Challenge:

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

National Council of University Research Administrators (NCURA)