# START myResearch

April 1, 2014

3pm ~ 4pm

**UIC** UNIVERSITY OF ILLINOIS AT CHICAGO

UIC

Lincoln Hall

707South Morgan Street

# Workshop Presenters

- **Youngwook Song**
  Associate Director, Research Administration Technical Service, University Office of Administrative Information Technology Services (AITS)
  ywsong@uillinois.edu

- **Dr. Jan Novakofski**
  Associate Vice Chancellor for Research & Professor of Animal Sciences, Urbana-Champaign
  jnova@uiuc.edu

- **Jacqueline Berger**
  Director of Communications and Interim Executive Director of IT, Office of the Vice Chancellor for Research – UIC (OVCR)
  Jacquieb@uic.edu

- **Jennifer Rowan**
  Executive Director, Research Administration and Operations, Office of the Vice Chancellor for Research - UIC (OVCR)
  Jrowan@uic.edu

# Please …

- Turn off cell phones.

- Avoid side conversations.

- Ask questions any time.

- Sign the attendance roster.

- Complete the evaluation at the end of the workshop.

# Workshop Objectives

- To understand the overall objective, scope, and roadmap of START myResearch project.

- To understand how START myResearch may impact you and/or your clients in terms of research support.

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# Sponsored Research Support Background

- University of Illinois Sponsored Research Profile
  - ~$1B / year in externally sponsored research support.
  - > 1000 different sponsors.
  - ~ 50% of institutional faculty, graduate students and staff involved in Research.

- Inefficient Research Administration Support Infrastructure
  - Campus by campus basis with different business processes.
  - Software applications (InfoEd, RISC, IBC Project Registration, IACUC Registration) work in silos.
  - Significant supplemental manual processing.

University of Illinois is one of top Research Universities in US.

However, current Research support is sub-optimal with manual intensive business processes using a myriad of software solutions with each working in silo.

# What is START myResearch?

- **START** = Systemwide Tools for Administration of Research and Training.
  - Use Kuali Coeus (KC) Open Source Software for Research Administration.
  - Targeting the KC COI (Conflict of Interest), followed by Pre-Award, IRB (Institutional Review Board), and IACUC (Institutional Animal Care and Use Committees).

> KC is used by 2 dozen higher education institutions and is proven to be effective in meeting sponsored research support needs.

- **myResearch** = Principal Investigator Portal (PI Portal).
  - Web portal.
  - Central point for both faculty members and staff to access information on a grant, including financial data, from inception to closure.
  - Will display compliance and other information in future phases.

> myResearch is being built based on best practices seen in Penn St. and UCLA.

# START myResearch Goals

- Deliver efficient operational support of research to serve and maintain a large and complex sponsored research portfolio.

- Reduce faculty burden and effort.
  - Integrate grant preparation, approval, submission, routing, and compliance.
  - Single point of entry and user friendly PI interface.

- Permit the institution to maintain compliance and competitiveness.

- Drive consensus best practice business processes for University-wide IT support.

# Oversight & Governance

- **START myResearch**
  - Funded by the Vice Chancellors of Research in Chicago and in Urbana.
  - In collaboration with the Office of the Administrative Information Technology Services (AITS).

- **Executive Oversight Committee**
  - Provide executive oversight and decision-making through **bi-weekly meetings** and supported and administered by staff from the Project Leadership Committee.
  - Committee Members:
    - Dr. Mitra Dutta, Vice Chancellor of Research at Chicago
    - Dr. Peter Schiffer, Vice Chancellor of Research at Urbana-Champaign
    - Dr. Michael Hites, Senior Associate Vice President, AITS

# Oversight & Governance

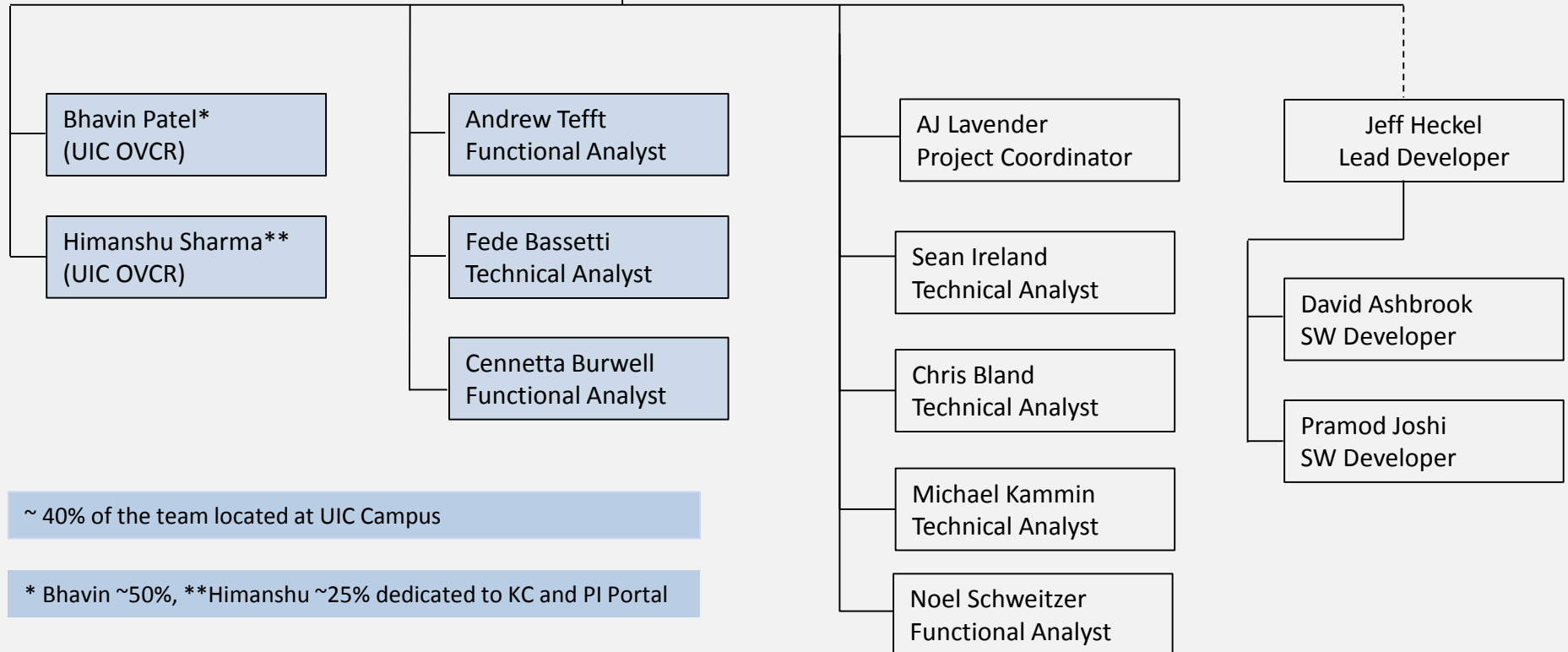- **Project Leadership Committee**
  - Meets weekly and manages the functional and technical teams.
  - Consists of senior campus representatives and AITS project managers:
    - Dr. Jan Novakofski - Associate Vice Chancellor for Research & Professor of Animal Sciences Urbana-Champaign
    - Dave Richardson, Associate Vice Chancellor, Office of Sponsored Programs Urbana-Champaign
    - Dick Harris, Associate Vice President of Application Development, University Administration AITS
    - Jacqueline Berger, Director of Communication, Chicago OVCR
    - Jennifer Rowan, Executive Director, Research Administration and Operations, Chicago OVCR
    - Youngwook Song, Associate Director of Research Administration, University Administration AITS
    - AJ Lavender, Project Coordinator, University Administration AITS

- **Project Steering Committee**
  - Composed of research faculty, support staff, research and business administration leaders, and others as needed.
  - Provides functional and technical advice and recommendations. The stakeholder and advisory group meets monthly.

# Project Team Members

**Youngwook Song**
Project Director

**Bhavin Patel***
(UIC OVCR)

**Himanshu Sharma****
(UIC OVCR)

**Andrew Tefft**
Functional Analyst

**Fede Bassetti**
Technical Analyst

**Cennetta Burwell**
Functional Analyst

**AJ Lavender**
Project Coordinator

**Sean Ireland**
Technical Analyst

**Chris Bland**
Technical Analyst

**Michael Kammin**
Technical Analyst

**Noel Schweitzer**
Functional Analyst

**Jeff Heckel**
Lead Developer

**David Ashbrook**
SW Developer

**Pramod Joshi**
SW Developer

~ 40% of the team located at UIC Campus

* Bhavin ~50%, **Himanshu ~25% dedicated to KC and PI Portal

# High Level Timeline (In Academic Year)

| 2013 ~ 2014 | | | 2014 ~ 2015 | | | 2015 ~ 2016 | | | 2016 ~ 2017 | | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| Fall (Sep, Oct, Nov, Dec) | Spring (Jan, Feb, Mar, Apr, May) | Summer (Jun, Jul, Aug) | Fall (Sep, Oct, Nov, Dec) | Spring (Jan, Feb, Mar, Apr, May) | Summer (Jun, Jul, Aug) | Fall (Sep, Oct, Nov, Dec) | Spring (Jan, Feb, Mar, Apr, May) | Summer (Jun, Jul, Aug) | Fall (Sep, Oct, Nov, Dec) | Spring (Jan, Feb, Mar, Apr, May) | Summer (Jun, Jul, Aug) |

KC COI

KC COI w/ new KC User Interface

All KC modules after 2014 will use new KC user interface .

KC Pre-Award w/ new KC User Interface

KC IRB & IACUC w/ new KC User Interface

Foundational prep work to begin in 2H 2014 for Pre-Award and IRB.

PI Portal

Periodic PI Portal Releases on as needed basis.

PI Portal Pilot Release April 2014

KC is in the process of changing their user interface starting with Pre-Award in 2014.

# KC COI Status

- Target RNUA support for SEP 2014

- Completed 3 weeks of Kuali Coeus (KC) and RICE training using rSmart - A commercial affiliate of Kuali Foundation - (Jan~ Feb)

- Started 2-week Sprint cycles for RNUA COI analysis, configuration, and development

- Pursuing Partner Level Kuali Coeus Membership at the cost of $90K / year

- UI enhancement mock up and review in progress

  - Continue to explore UI customization capabilities of KC COI module.

  - For future releases (starting late 2015), leverage KC UXI (new User Interface) and KRAD (app development).

# KC COI Benefits

University manually processed ~15,500 RNUA and 3764 PHS disclosures last year
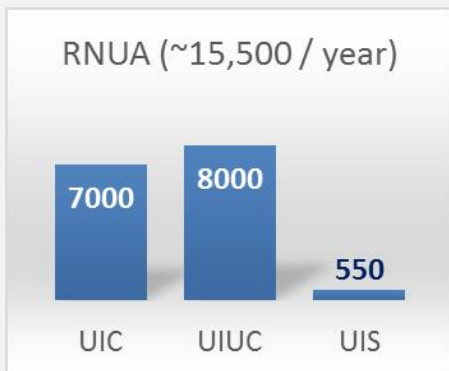


KC COI Benefits:

- Automatic electronic routing for approvals.
- Paperless system that provides a single source to view, manage and track COI disclosures.
- Data, all disclosure and conflict information, available for reporting.
- Access to prior disclosures & financial entities.
- Common business processes across all three campuses.
- Integration with other KC modules (Proposal, Award, IRB, IACUC, etc.)

# myResearch (PI Portal) Status

- Phase 1 / Pilot Release in April 2014

- Key features:

  - Enable PI to view all Pending Proposals, Pending Negotiations, Active Awards, Non-funded Proposals, Closed Awards.

  - Summary Financial data using standard grants format for Active Awards. Cross walked ~1900 Banner accounts code to 26 categories.

  - Current & Pending award listing.

  - Allow Business Managers to see all grants associated with Principal Investigators in their department.

PI Benefits:

- All your grant information will be in one place.

- Will integration administrative, financial, and compliance information and provide a yearly record of grant activity.

- PI Portal is being rolled out over the course of several years, and you have a voice in this project.

# myResearch & UI Reports Distribution

**myResearch:**

Central point for both faculty and staff to access information related to sponsored research.

**UI Reports Distribution:**

Interactive Access for Business Managers and faculty to financial information pre-filtered based on Role App entries

Portal to display proposal, award, protocol, and financial data for grants.

Financial data for Grants

Dashboard to display financial information for all types of funds. Ability to drill down to select standards reports.
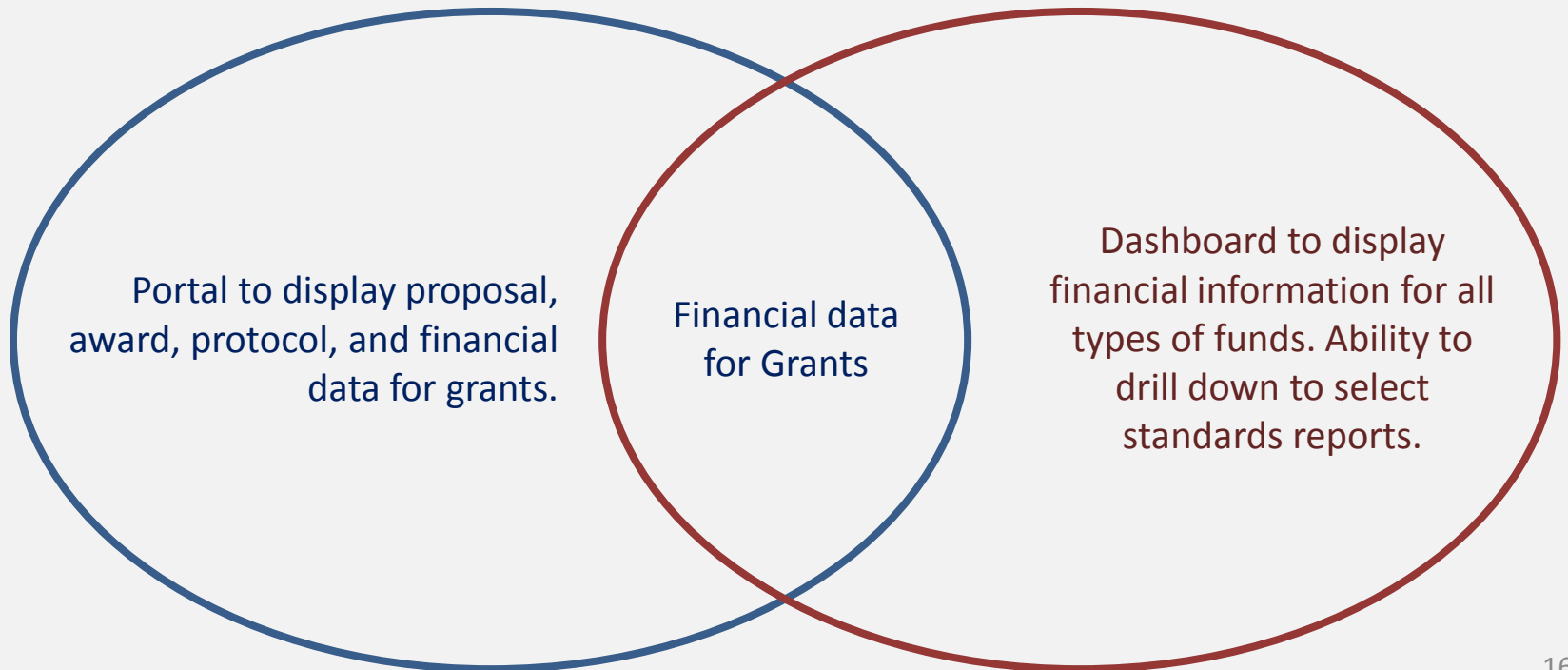
# myResearch Demo (Prototype)

# Communication

- START myResearch Website
  - http://web.uillinois.edu/start_myresearch/

- Contact Us
  - Youngwook Song -  ywsong@uillinois.edu
  - AJ Lavender - ajl@uillinois.edu
  - Jan Novakofski - jnova@uiuc.edu
  - Jacqueline Berger –  jacquieb@uic.edu
  - Jennifer Rowan - jrowan@uic.edu
  - Dave Richardson - daverich@uillinois.edu
  - Dick Harris - rsh1@uillinois.edu

# Thank You!