TARA Update

Christine Lavoie
Director, Research Administration
Post-Award (Kuali Coeus)

Service Center Recharge (CORES)

Regular Administration (Click Commerce)

Effort Certification

Financial Processes (KFS)

Financial Projections and Reporting

Research Administrators

- USC first university to bring integrated KC-KFS into production
- Post Award rollout date TBD
• Budget change ready for testing
• Contracts and Grants Billing module go live in November
• FiPS specifications complete; in production with Post Award
• Migrating SCera reports in progress
October 10, 2012
TARA Update

- Development begins this month
- Rollout tied to Workday implementation; date TBD
- **Post-Award (Kuali Coeus)**
  - Phase 1 complete this month
  - Phase 2 starting in January

- **Service Center Recharge (CORES)**

- **Regulatory Administration (Click Commerce)**
  - Work resumes this month
  - Deploy January 2013

- **Financial**
  - diSClose

- **Effort Certification**

- **RESA Update**
  - Financial Projections and Reporting
Research Administrators Forum
October 10, 2012

- Data Acquisition from pilot cores in progress
- Test system with USC core pilot data available in October
KC Financial Projection System (FiPS)

Overview

Project Manager: Candice Poolman
Steve Wagner and Winnie Lai

October 10, 2012
• Provide general overview of the KC Financial Projection System (FiPS), current status
• Provide update of KC FiPS project
KC FiPS Quick Overview

- FiPS will be accessible through Kuali Coeus (KC).
- Provide financial projection capability for Principal Investigators (PIs) and Research Administrators (RAs).
- Provide ability to combine existing data (known data) with future projected plans (unknown data).
- Improved methods for payroll projections and payroll input via effort utilization screen.
- Enhanced projection reporting capabilities.
KC FiPS Walkthrough

Select Projection Period
Enter Projection Data

Known Data
USC Data Warehouse (KFS, KC*, Workday*/Payroll, Student Information System*)
Awards
Accounts
Proposals
Employees

Unknown Data
Projection Data

Projection by Account
account

Cognos Report Generator
of email projection reports (more options)

Output

* Pending availability of data
FiPS will allow users to:

- **Access existing data** (as available) from KFS, KC, Workday/Payroll, and SIS via:
  - Their accounts (research and non-research)
  - Their proposals
  - Their employees (including faculty, staff, GRAs, post-docs, and student workers)

- **Modify account and employee parameters and/or add simulated accounts** (for projection purposes only)

- **Perform financial projections** on accounts and/or simulated accounts, creating future spending plans for compensation and non-compensation (will include proposals in the future).

- **Run projection reports** by account or via Cognos: by selecting groups of accounts, simulated accounts, and proposals by projection period as desired
Next Steps

• Complete detailed functional specifications based on mockup screens.
• Review mock-ups and specifications with development team.
• Make adjustments to mock-up and specification plans as necessary (if programming issues are identified).
• Development team begins setting up the basic foundations for project (access to data, etc.)
• Obtain final approvals of system design
• Quality Assurance testing
• User Acceptance Testing
• Training & Go Live! 😊 - With KC Post-Award roll-out
Questions?

• Contact
  – Candice Poolman – cp_175@usc.edu
  – Steve Wagner – swagner@usc.edu
  – Winnie Lai – winniela@usc.edu
KFS Effort Certification (eCert)

October 10, 2012
Summary of Key Requirements

- User friendly interface
- Increase efficiency in the system
- USCnet ID login and instructions for how to retrieve forgotten login and passwords
- Increase completion rate of certifications
- Ability to certify multiple certification documents
- Usable on multiple browsers
Summary of Key Requirements

• Effort must certify to 100%
• Role based (i.e. certifier, preparer, reviewer, system admin roles)
• Archives certifications for audit purposes
• Must take into consideration cost sharing, salary caps
• Improve accuracy of institutional base salary
• Exception handling for special certification circumstances such as separation from USC, multi-department splits, new staff
Future Workflow

Certification period opens

If a PI or Certifier has been delegated to, certifies for RA’s as well

If a preparer has been designated, s/he will prepare the certification(s)

Certifier certifies for self and system records certification

Certifier will be notified to certify

If a preparer has been designated, s/he will prepare the certification(s)
• GO TO LIVE DEMO