

# **TARA Presentation**

## **Research Administrators Forum**

**April 3, 2013**



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](mailto:sdacosta@usc.edu)) in the Office of Research



Excel | PDF

Customer Name: Peter Conti  
 Invoice Number: CORES1303010052  
 Account Number: 5351493301  
 Total Amount: \$1,685.00  
 Invoice Date: 03/01/13

**Core Name:** Molecular Imaging Center - Small Animal Imaging      **Contact:** Grant Dagliyan (323) 442-3858

Date	Item Nbr/ Category	Description	Qty	Price	Sale/ Refund	Order	Extended Price	Approve	Dispute
01/17/13	Analysis Workstation II	Workstation available for data analysis Hour	0.5	\$50.00	Sale	355	\$25.00	<input type="checkbox"/>	<input type="checkbox"/>
<b>Order Comments:</b> Resource name: Analysis Workstation II Reservation confirmation nbr: 20130116-3) Rsrvt Date: 01-17-2013 Time: 03:00 PM - 03:30 PM <b>Purchased By:</b> Conti								<b>Subtotal:</b> \$25.00	
Date	Item Nbr/ Category	Description	Qty	Price	Sale/ Refund	Order	Extended Price	Approve	Dispute
01/14/13	Development	Supervision Hour	3	\$120.00	Sale	16	\$360.00	<input type="checkbox"/>	<input type="checkbox"/>
<b>Item Comments:</b> this is great <b>Order Comments:</b> this order <b>Purchased By:</b> Conti									
02/08/13	Development	Upfront Setup Hour	2	\$100.00	Refund	319	(\$200.00)	<input type="checkbox"/>	<input type="checkbox"/>
<b>Refund Reason:</b> Incorrect Quantity <b>Order Comments:</b> test 2 <b>Purchased By:</b> Conti									
01/14/13	Development	Upfront Setup Hour	5	\$100.00	Sale	16	\$500.00	<input type="checkbox"/>	<input type="checkbox"/>
01/14/13	Development	User Support Hour	10	\$100.00	Sale	16	\$1,000.00	<input type="checkbox"/>	<input type="checkbox"/>
<b>Order Comments:</b> this order <b>Purchased By:</b> Conti								<b>Subtotal:</b> \$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





# AWARD AND ACCOUNT SETUP



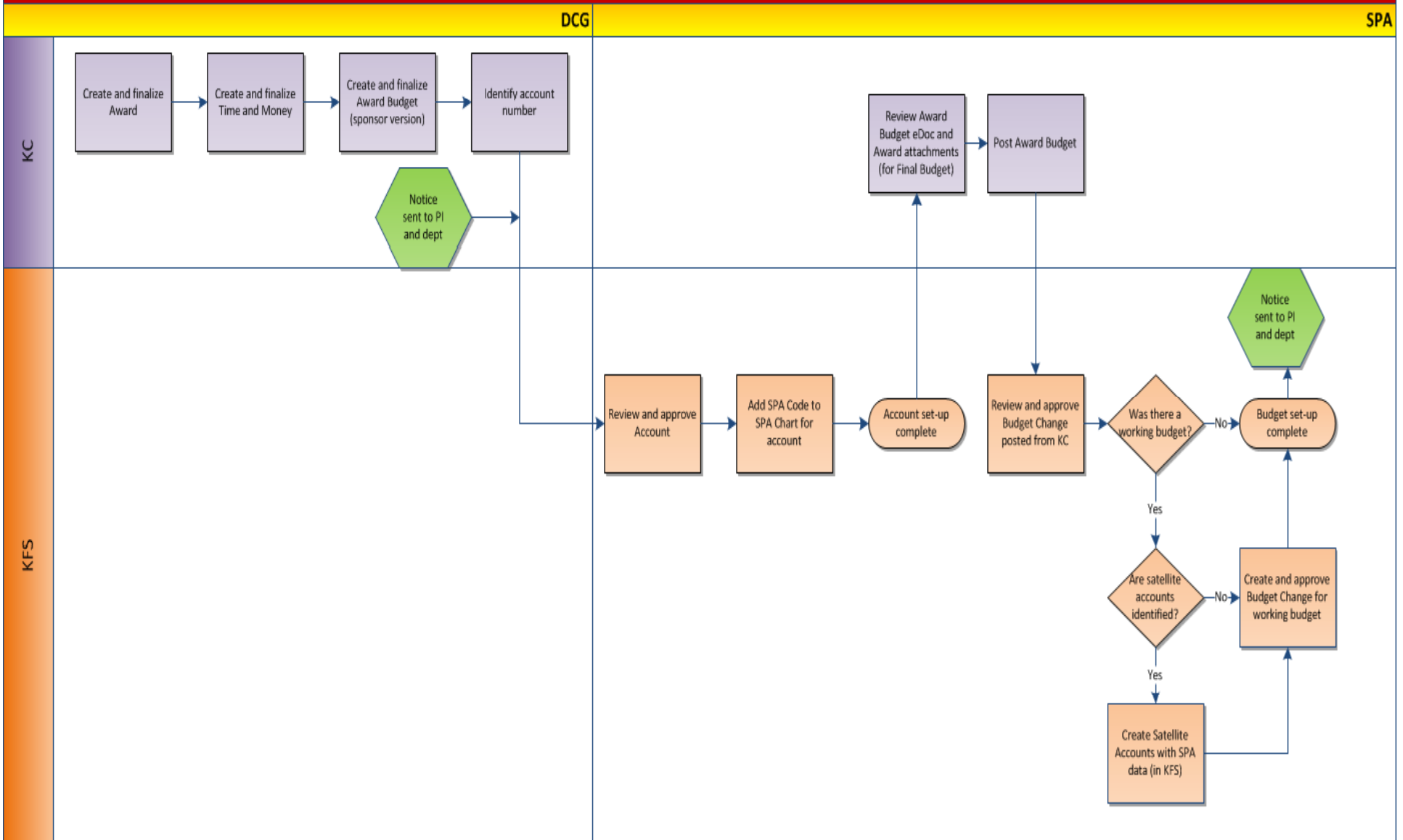
# What's New?

- 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



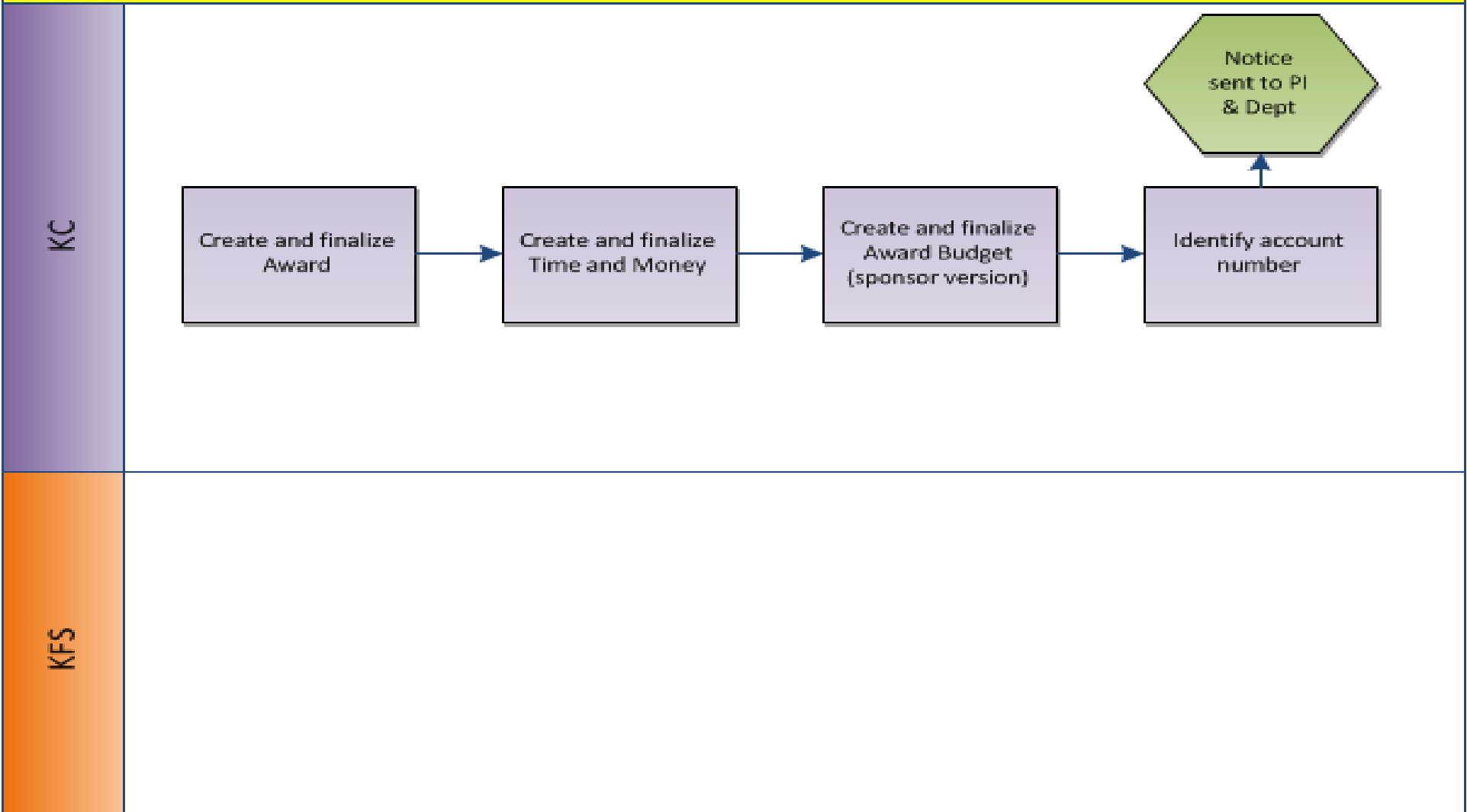
# Process Overview

## Award Account & Budget Set-Up Workflow



## Award Account & Budget Set-Up Workflow

DCG



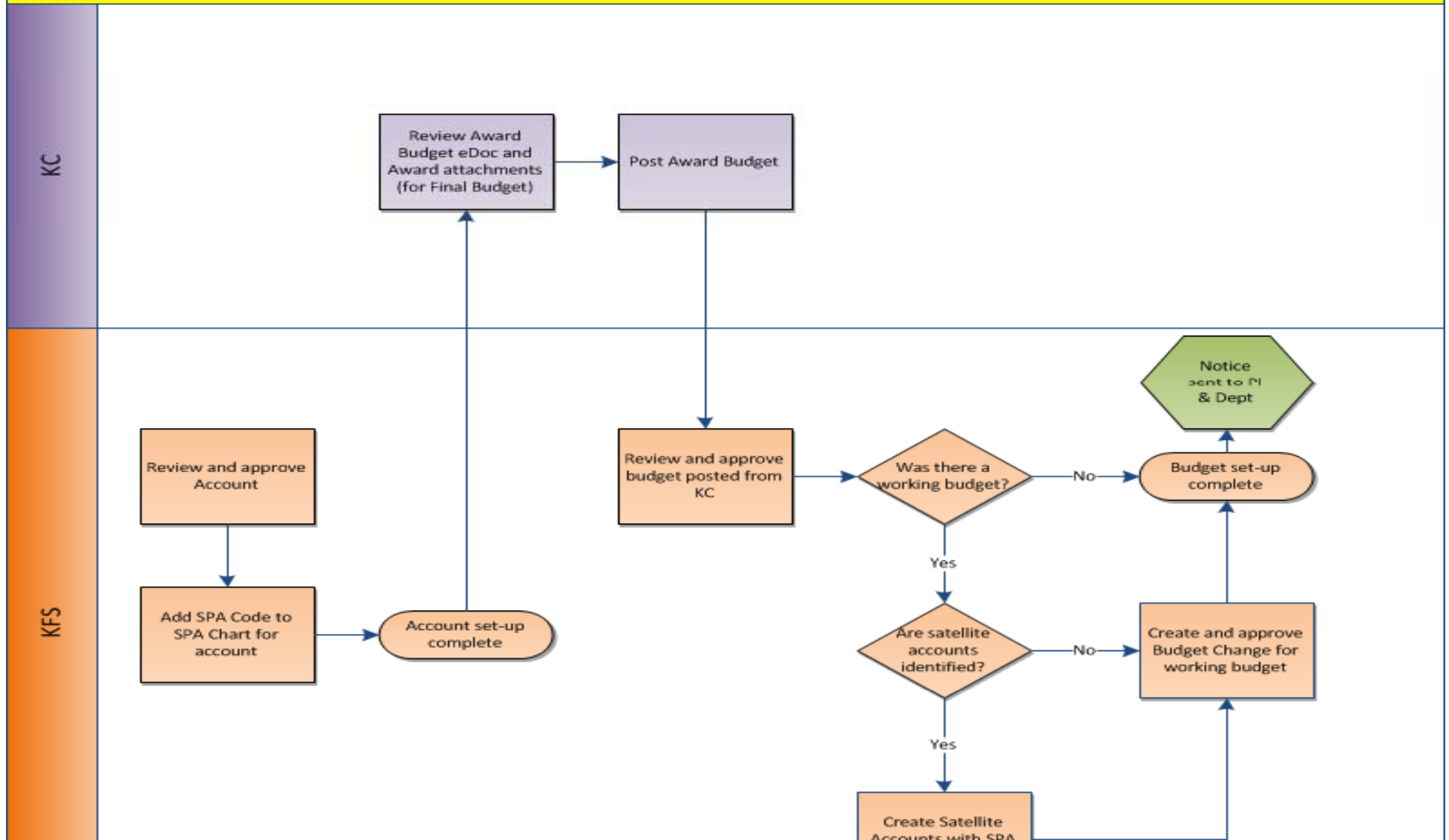
- Set up award in KC
- Link detailed budgets submitted prior to award to KC award record
- Enter award budget as received from sponsor
- Determine account number
- Handoff account creation process to SPA
- Notify PI and department that award has been established



# SPA Steps

## Award Account & Budget Set-Up Workflow

SPA



## Sponsored Projects Accounting

- Create account in Quali 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



# System Access

## 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 Quali 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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