



## QUARTERLY NEWSLETTER

June 2011

### INTRODUCTION

Welcome to the June Kuali newsletter. We are looking forward to a very busy summer, with releases scheduled for most of our systems, and plans for major implementations by partner schools and other adopters.

Call for Proposals for Kuali Days 2011 in Indianapolis is now open. For further information about Kuali Days 2011 and how to submit a proposal, see [www.kuali.org/kd](http://www.kuali.org/kd). The Call for Proposals will be open through July 15, 2011.

Soon there will be new ways to communicate with Kuali. Our next Newsletter will present a new format, and during the summer, we'll be implementing a new look for our Kuali web site.

### **KUALI LAUNCHES NEW PROJECT – Kuali Mobility Enterprise**

The Kuali Foundation recently launched Kuali Mobility Enterprise as a next generation set of tools to connect mobile devices to a variety of campus systems. "Students, faculty, and staff expect to be able to use their smartphones and tablets to get information and do their work," said Brad Wheeler, Kuali Foundation Chairman and Vice President of Information Technology and CIO at Indiana University. "With the maturing of HTML5, campuses can move to the next stage of mobility services without having to expensively develop and maintain custom software apps for each new device. The time is right for a major shift in mobile service capability and economics."

Kuali Mobility software will help campuses connect their many information systems - library, teaching and learning, administrative, research, bus schedules - and enterprise data to mobile devices (iPad, Android, Blackberry). The first release is targeted for August 2011.

The rapidly evolving world of smartphones, tablets, and other mobile devices being used on campuses is creating a huge demand for mobility tools and applications. Coupled with the movement towards eTexts

and a growing expectation for "any place, any time, any device service," campuses have a timely opportunity to collaborate and solve this common challenge together. "For Cornell, Kualu Mobility Enterprise is the right idea at the right time. We have high aspirations for the potential of mobility, but lack the necessary infrastructure. With Kualu Mobility we will have a sustainable, community-based platform and toolset that will accelerate Cornell's progress toward a leading edge platform in a matter of months," said Ted Dodds, CIO and Vice President at Cornell University.

"We are very excited to learn of the Kualu Mobile Enterprise work," added John Norman, Director of the Centre for Applied Research in Educational Technologies (CARET), University of Cambridge. "It is difficult to underestimate the potential for iPads and similar devices in the learning space and we look forward to working with the project to extend the Sakai student experience using this platform."

Kualu Mobility Enterprise is based on the evolving Kualu Mobile framework that leverages the best-of-breed, existing open source mobile platforms that enable institutions to provide their constituents with a mobile web gateway to interact with public and/or securely authenticated services. Kualu Mobility Enterprise is the packaging of that mobile platform based on HTML5, CSS and JavaScript. It uses the extensive work from other open source mobile projects like JQuery Mobile and PhoneGap. The Kualu Mobile framework will enable mobile applications to be written, tested, packaged, and delivered to constituents through the mobile web or through an installable app for their particular mobile device via one of the application stores. Those applications might be written by Kualu projects or by any institutional or collaborative development activity.

The Kualu Mobility initiative has consulted with other institutions, and is exploring opportunities with the University of California to support interoperability, partnership, and potential integration with the UC Mobile Web Framework.

See <http://kualu.org/kmobility> for more information regarding the Kualu Mobility Enterprise project and ways for institutions to get involved.

## **WELCOME NEW MEMBERS**

We welcome three new members to the community since the last Newsletter.

Sacred Heart University, Universidad del Sagrado Corazón in Spanish, or more simply, Sagrado. Sacred Heart University in Puerto Rico is a higher education institution based in Santurce and is one of the oldest, largest and most prestigious institutions in Puerto Rico. "Sagrado made the decision to adopt Kualu Student to replace its Student Information System that has been in use for over 25 years. With this decision, Sagrado is following its trajectory path in choosing Open Source Collaborative software development." Sagrado is also interested in installing Kualu Financial System and possibly Kualu Ready.

Oakland University, located in Rochester, Michigan, celebrated the 50th anniversary of its founding in 2007. When it opened in 1959, 570 students were enrolled, and the charter class graduated in 1963 with 125 students receiving diplomas. Today, more than 19,000 students attend classes at OU each fall, and

the alumni number more than 80,000. Oakland is moving forward to using more Open Source software and Kualu is a very viable solution. Kualu Coeus is their starting point for involvement, as they seek to improve the systems experience for the Office of Grants, Contracts and Sponsored Research.

Miami Dade College was created with the idea that anyone with a desire to get a college degree should be given that opportunity. Miami Dade first opened its doors in the 1960s with just 1,428 students growing quickly to more than 15,000 students by the end of the decade. By 1967, the College was the largest institution of higher education in the state of Florida. Miami Dade is going to be using Kualu Ready on their campus in the Office of Emergency Preparedness.

VMware is our newest Commercial Affiliate. VMware, the global leader in virtualization and cloud infrastructure, is the company behind Spring and Groovy. Spring is the foundational framework on which the Kualu Rice system is built. [See the article on VMware later in this Newsletter.]

## **KUALI PROJECT UPDATES**

### Kualu Financial System

Kualu Financial System 4.1 was released April 15, 2011. It included enhancements to the Endowment module, a new module for Access Security contributed by rSmart, and key components for the integration of the Kualu Financial System (KFS) and Kualu Coeus (KC).

We are planning for two minor releases and our next major release, KFS 5.0. The minor releases will complete the integration between KFS and KC and an upgrade to Rice 2.0, which is the version of Rice that provides “backwards compatibility.” Both of these minor releases are critical to the sustainability of KFS and its integration with other Kualu products. KFS 5.0 is in the planning stages and the scope and timeline will be defined by July 1, 2011.

Three major contribution projects are currently in progress, Kualu Materiel Management, Travel and Entertainment Management, and Contract & Grant Billing.

The Materiel Management (MM) application contains a full suite of functionality for managing a warehouse operation and also includes point of sale. The MM application is being developed between Michigan State University and University of California Davis. The base developed MM Application is currently in use at Michigan State University. The new version of MM is scheduled to be complete by Sept 1, 2011 and will include new functionality such as vendor punch-out capabilities and enhanced shopping cart functionality.

The KFS Travel & Entertainment Module (TEM) provides for travel authorization, expense tracking and reimbursements for travel, entertainment, moving and relocation activities. The module is integrated with the KFS Disbursement Voucher (DV) and Accounts Receivable (AR) module. The development of the TEM module will be complete December 2011. There are 7 partner schools invested in TEM.

The Contract and Grant Billing enhancements to the KFS Accounts Receivable (AR) module support the research enterprise by automating routine billing and collection tasks. Based on the University of

Maryland's post-award research administration system, BARS, Kuali Contract and Grant Billing will provide both cost reimbursable grants and letters of credit. Software development for the project is composed of two phases, each approximately one year in duration. Phase 1 consists of setting-up sponsors and projects, creation of invoices, management of letters of credit (LOC), associated reporting and KFS AR module enhancements. This development is expected to be completed at the end of November 2011. Phase 2 includes invoice collection functionality which includes dunning letters, litigation, and associated follow-up. Phase 2 completion is expected in November of 2012. These three major projects are examples of how those with common interests and goals can come together under the Kuali umbrella and provide software for higher education.

### Kualि Coeus

Kualि Coeus 3.1 will be released on July 1, 2011. KC 3.1 includes a number of enhancements to Awards and Budget functionality in order to approach functional equivalency with Coeus 4.5. The release also includes a number of new Grants.gov forms for online submission. Finally, there are numerous enhancements to the Institutional Review Board (IRB) functionality.

Kualि Coeus implementations are underway! A list of KC implementation plans can be found at [www.kuali.org/kc/implementations](http://www.kuali.org/kc/implementations). As these implementations become active, many good discussions are taking place on the KC implementers collaboration lists. The true functional and technical experts on Kualि Coeus participate in these discussions and share their answers with everyone. If you are interested in joining one of the KC collaboration lists, you can find out more at [www.kuali.org/kis/collabs](http://www.kuali.org/kis/collabs). You will need to create a Kualि Information System (KIS) account to join and begin participating.

Soon after KC 3.1 is released, the KC integration functionality with KFS will be released in a KC 3.1.1 patch release. The integration points with KFS include account creation and inquiry, effort certification, CFDA, and budget adjustment. These enhancements will greatly benefit those schools implementing both KFS and KC.

In the fall of 2011, KC 3.2 will be released which will be compatible with Kualि Rice 2.0. This new version of Rice will include significant enhancements to modularity, version compatibility, and richer UI capabilities. The next major release of KC is KC 4.0 which is targeted for the end of 2011. KC 4.0 will include the Conflict of Interest, Subawards, Negotiations, and Report Tracking modules. Full functional equivalency with Coeus 4.5 is expected to be delivered by March 2012 in the Kualि Coeus 5.0 release. The KC team continues to make steady progress towards functional equivalency with Coeus 4.5. It is great to see the Coeus and KC communities coming together to achieve consistent results through effective collaboration!

### Kualि Student

The past several months have seen important progress for the KS project on multiple fronts.

On the development front, significant progress has been made in the development of Kualि Student Curriculum Management 1.2, thanks in part to the efforts of the University of Maryland on this project.

Additionally, we're happy to announce that the development of Kuali Student Enrollment has begun. We're calling this first phase of development "core slice"-- intended to lay the services foundation for the rest of KS Enrollment. Core slice development is expected to carry us through to Kuali Days this year.

On the planning front, the KS project team made significant progress in putting together the strategic 3 year roadmap for Kuali Student. The roadmap picture currently on the KS website is out of date and will be updated with new materials from this planning effort as part of the [kuali.org](http://kuali.org) revamp effort.

The KS 3 year strategic roadmap highlights:

KS Curriculum Management 1.2 by the end of 2011

KS Enrollment 1.0 targeted for the end of 2013

KS Enrollment 2.0 by 2015

One other exciting prospect related to the roadmap is that there is a project proposal currently being considered by the community to work with a third-party to develop the KS Student Financials module. This would significantly accelerate the development of this module to the point where it could be made available even before KS Enrollment. More details will follow if indeed this project is approved to proceed.

### Kuali Rice

Rice 2.0 Beta Test starts in August and the team wants community participation! Email [jessica@kuali.org](mailto:jessica@kuali.org) if you are interested in helping the Rice team ensure that we have everything tested for your particular Rice environment. Final release of Rice 2.0 is scheduled for the last quarter of the calendar year 2011, and it will include middleware version compatibility, modularity, library upgrades, KRMS (Kuali Rules Management System) and KRAD (Kuali Rapid Application Development). The team has been using an agile development approach by providing monthly milestones to internal Kuali teams to get the code out early and allow us to respond more quickly to changes.

Other news:

- [Kuali Rice 1.0.3.2](#) was released on June 15 and consists of several bug fixes and support for Tomcat 7.
- The Application Roadmap Committee (ARC) has developed a [Draft Roadmap](#) that should be finalized soon.
- The [Rice technical collaboration group](#) and meetings will be focusing more on implementation support and information sharing.
- The Rice Board put together a strategy workgroup to look at how to address key strategic item like mobile support and identity management while also addressing the prioritized Roadmap items.

The Rice team continues to expand by adding several key roles.

--In order to provide equal focus to the functional side, Rice has hired a User Experience Architect (Candace Soderston) and Business Analyst (Matt Sargent). Together with Eric Westfall, Lead Technical Architect, and our development teams, Candace and Matt will ramp up the analysis and documentation

for Rice. User Experience (UX) which has also become the focus of the Kuali Application Integration (KAI) group.

--Under leadership from William Washington, Kuali Student UX Architect, we plan to work toward some common user standards across projects.

--On Kuali Infrastructure, we have hired Shem Patterson who will be assisting Farooq Sadiq with infrastructure support and the team can now start tackling the larger infrastructure items that had previously been put on hold.

--We continue to hire for the Rice [Configuration Manager](#) and a senior [Developer](#) position. See more information about those positions in the jobs section of this newsletter and on our web site.

### Kual Open Library Environment (OLE)

Kual OLE delivered its first code demonstration at the Coalition for Networked Information (CNI) conference in San Diego, CA on April 5, 2011! Utilizing KFS as the engine for its financial processes, the OLE demonstration successfully illustrated core library business processes for ingesting records from a publisher and navigating through the requisition/purchase order process.

A critical piece of the OLE architecture will be the repository housing the millions of bibliographic records stored by a library. OLE is investigating document store technology, utilizing SOLR/Lucene indexing schemes. Two demonstrations have been provided by our development partner, HTC Global Services, illustrating the functionality and scalability of the document store technology. The most recent demonstration revealed a search against a collection of 5 million records could return a result in mere milliseconds!

Kual OLE is targeting its first public, test release in time for Kual Days in November. Scoping has been completed for this release, and the OLE community is looking forward to making this release available on the Amazon EC cloud to the public.

The Kual OLE Core Team is also pleased to welcome Nianli Ma as our Senior Technical Architect. Nianli joined the team on June 1, 2011. For more updates, please go to the Kual home page at [www.kuali.org/ole](http://www.kuali.org/ole).

### Kual People Management for the Enterprise (KPME)

The KPME team is working towards a July 2011 release of our first module, Kual Time and Attendance. Based on Indiana University's TIME system, Kual Time and Attendance will provide an enterprise wide system to record hours worked, hours in a pay status and absent time in an easy-to-use web-based interface. Designed to handle multiple pay types and pay cycles, KPME Time and Attendance will calculate all special rates of pay such as overtime, shift differential, premium and holiday pay. For more information on Kual Time and Attendance, see <https://wiki.kuali.org/display/KPME/KPME+Time+and+Attendance>.

Next up for the KPME team is Kual Leave Management. In an effort to round out a full time management solution, the KPME team is gathering requirements and developing technical specifications

for Kualu Leave Management. This module will allow organizations and their employees to accrue, request, report and track the use of benefit time (eg. Vacation, Sick, etc) for exempt and non-exempt faculty and staff. For more information on Kualu Leave Management, see <https://wiki.kuali.org/display/KPME/Leave+Management+Module>. Development is targeted to begin in late June with a target release by the end of the calendar year 2011.

The KPME project team continues to scope out the entire KPME project including defining high level requirements, integration points and between each module and timelines. We continue to update our documentation as the picture becomes clearer. For the latest information on the planned KPME modules, see <https://wiki.kuali.org/display/KPME/KPME+Project+Documentation>.

Finally, we continue to talk with numerous institutions that are interested in KPME and hope to be announcing the addition of new partners soon. If you are interested in joining KPME or would simply like to find out more about our project, please contact KPME Board Chair Maury Hope at [mmhope@iastate.edu](mailto:mmhope@iastate.edu)

### Kuali Ready

Kuali Ready, the Kualu Foundation's first hosted service, continues to generate a great deal of interest in the higher education community. As of late June 2011, there are over 62 subscribers and we are receiving product inquiries on an ongoing basis. We have international users in Canada and Australia with other potential international and domestic users in discussion. For more information about our continuity planning tool for higher education, please visit our site at <http://kuali.org/ready>.

## **QUARTERLY UPDATE**

### Update on Kualu Member Implementations

**University of Southern California (USC):** On March 21, 2011, the University of Southern California (USC) upgraded its implementation of the Kualu Financial System, migrating from KFS 3.0.1 to KFS 4.0. This is the first implementation of the KFS 4.0 release in a production environment among Kualu partners. USC simultaneously upgraded Kualu Rice middleware from 1.0.1 to 1.0.3.1. Other significant elements of the USC implementation are the use of the open source MySQL database and the phased approach to production migration. To date, cashiering, journal vouchers, and purchasing cards with associated e-statements are in production. Remaining capabilities, slated for production by July 2012, include general ledger, purchasing, accounts payable, and capital asset management.

USC has been a member of the Kualu Foundation since 2007, is a partner with the KFS project, and is a founding partner of the Kualu Student and Kualu Ready projects. The transition to the new financial system has gone smoothly according to campus officials, who view Kualu as a primary example of how institutions can contain the total cost of ownership for administrative systems in higher education through innovation and collaboration.

The implementation of the Kuali systems for financial management and student information are part of a large enterprise systems overhaul for USC. The implementation demonstrates how Kuali systems can be successfully deployed and link and integrate with other homegrown and vended systems.

**University of Washington (UW):** On Monday, May 16, Tuition Change, an Enterprise Workflow solution powered by Kuali Rice, became available to University of Washington administrators who deal with changing the fees that students are charged for educational instruction. Tuition change will automate a variety of processes, saving the UW time and money while enhancing compliance. Tuition Change is the first Kuali Rice product implemented at the UW, which has been a member of the Kuali Foundation since 2009 and is a partner on the Rice project and a founding partner on the Kuali Student project. The process of changing tuition in various UW colleges and schools currently requires the use of paper forms, takes several days or longer to complete, and is difficult to track.

Tuition Change also provides visibility into the complex process of changing the cost of courses or programs—a process that starts in a department, moves through administrative layers including technicians and secretaries, and ends at the Board of Regents. It provides an easy method to tell who has made changes and who has the ball now in a workflow process. It can also accommodate and track the widely different rules that individual colleges and schools have regarding increases in tuition.

Jeff Petersen, Assistant Director of Student Fiscal Services for the UW, and among the first to use the new workflow, said, “Thanks to UW Information Technology for the fabulous work done on automating the tuition change process here at the UW! The Tuition Team was honored to be chosen to participate in one of the first enterprise workflow implementations on campus and the final product has surpassed our expectations. I found the tool to be easy to use, and I am excited to finally have a centralized place to monitor the status of each step in this important work. I look forward to seeing more Kuali Rice implementations in the future, and I’m excited for the potential it holds for the broader campus community.”

A UW Information Technology Enterprise Workflow Team will assume primary support responsibility for the Tuition Change service. MySQL database support is provided by the IM DBA Group and server administration is provided by Application Engineering (AE) and Unix Engineering teams at UW. Kuali represents a powerful platform for developing future applications at the UW. A second Enterprise Workflow solution, Supplier Registration, will be deployed in summer 2011, and additional procedures currently are in development.

**Indiana University (IU):** President Michael McRobbie announced implementation of a new, comprehensive grant administration system to better assist faculty researchers at every stage of the grant-making process.

The open-source Kuali Coeus research administration system will replace and build upon the university's current Electronic Research Administration system and components of the Financial Information System, as well as numerous internal research administration systems and databases.

IU Vice President for Research Jorge José said he expected a smooth transition at IU to a new system that will eventually be implemented at universities across the country.

"We see this new system as a game-changer not only for Indiana University, but also for the network of elite research institutions already committed to using a system modeled from MIT's highly-regarded Coeus application," he said. "In replacing Coeus, Kuali Coeus will offer a free, open-source research administration tool that will be accessible from any common web browser."

Indiana University has been instrumental in the development of the Kuali Foundation and Kuali Coeus through its support of a collaborative, open-source environment to deliver enterprise systems for higher education.

Kuali Coeus will be implemented at IU in two phases between July 2011 and December 2012. Phase 1 (July 2011) will allow users to build simple or complex proposals for individual or aggregate submissions, create budgets, and submit proposals for both Grants.gov and non-Grants.gov entities. Phase 2 (December 2012) will provide the ability to create awards, award terms and conditions, and to manage complex multi-account awards. Phase 2 will integrate Kuali Coeus with financial components debuting in the Kuali Financial Systems at Indiana University.

#### rSmart hosts Kuali Developer Training

rSmart is hosting Kuali Developer Training workshops for Kuali Rice, Kuali Financial System and Kuali Coeus. This training will be held August 15-26, 2011 at the [rSmart Corporate Office](#) in Scottsdale, AZ. from 8 AM - 5 PM PDT. For more information, log on to: <http://info.rsmart.com/rsmart-training-workshop-for-kuali-rice-developers/?t=47574>

#### Kuali Community Workshop held in New Orleans

The Kuali Foundation hosted the 2011 Kuali Community Workshop the last week of April at the Marriott Hotel in downtown New Orleans on Canal Street near the historic French Quarter. The purpose of the Workshop was to provide an effective and efficient environment to enable collaboration for the community and its projects.

189 participants from 32 higher education institutions and commercial partners attended, including 3 international schools: North-West University South Africa, University of Toronto, and University of British Columbia.

The Workshop held 29 group meetings including Project Boards, Functional Councils, and Technical Development Work Sessions. The groups spent time reviewing project scope, time, resources, budgets, and future roadmaps. Project Managers gave status to the Project Boards and there were roundtable discussions on strategies, releases dates and planned implementations.

#### Kuali Foundation Newest Commercial Affiliate: VMWare

Last month, Kuali welcomed VMware as our newest Commercial Affiliate. VMware, the global leader in virtualization and cloud infrastructure, is the company behind Spring and Groovy. Spring is the foundational framework on which the Kuali Rice system is built.

Spring is the world's most popular Java development framework. Unlike the traditional Java EE platform, Spring provides a range of capabilities for creating enterprise Java, rich web, and enterprise integration

applications that can be consumed in a lightweight, a-la-carte manner. In addition to the Spring Framework, VMware offers the vFabric Cloud Application Platform. VMware vFabric is a complete set of application services including a lightweight application server, global data management, cloud-ready messaging, and application performance management capabilities, making it the ideal platform for building, running and scaling Spring applications.

"Using Spring is a natural fit for us," said Jessica Coltrin, Kualu Rice Project Manager. "Kualu Rice utilizes Spring to wire up all of our services and take advantage of its inversion of control functionality. We also use its transactional support, DAO support, and Spring remoting for the HTTP Invoke functionality for doing Java serialization over HTTP. For our Rice 2.0 release, we will be using Spring MVC as our primary MVC framework, the Spring email-related classes, and increased use of the Groovy dynamic programming language. Spring is known for supporting and integrating relevant products which will make it easier for us to take advantage of new view technologies as they emerge or as requirements are added so we are looking forward to working with VMware as a Kualu Commercial Affiliate".

### OLE Demonstration at CNI

On April 5, 2011, members of Kualu OLE Project Team demonstrated a first peek at the new Open Library Enterprise System, known as Kualu OLE. OLE was presented by Executive Director Robert McDonald with Mike Winkler, Chair of the Functional Council, Brad Skiles, Project Manager, and Rich Slabach, QA Manager, to the participants at CNI.

The "core" of Kualu OLE is the Kualu Financial System, modified and extended to meet the unique needs of libraries. The OLE Team demonstrated the following: 1) a standard library workflow creating vendor purchase orders, 2) the simple ingestion of external data, 3) configurable workflow, 4) ability to use the infrastructure of Kualu Rice and Kualu Financial.

The CNI Conference Participants were impressed with their first look at OLE, and after the presentation there was an extended Q & A session as the audience was eager to ask questions and hear more about the project.

### New Job Postings in the Kualu Community

Our community is growing! Since the last quarterly newsletter, we have some new job postings, listed below.

The following are positions posted on our Kualu web site, so the links will take you to the complete job listing.

[UMD Business Analyst](#)

[IU Chief Process Experience Architect](#)

[Kualu Rice Config Manager/Developer](#)

[IU Lead Software Analyst/Programmer for Knowledge Management System](#)

[KS seeks Test Engineer, Senior Developer, User Experience Designer](#)

The following is from one of our KCAS: VivanTech

VivanTech is seeking Senior Business Analysts and all levels of Java/J2EE Software Engineers, for full-time opportunities. These team members will become a part of our multicultural west coast division in the San Diego, Orange County, Los Angeles, and Bay Area/Silicon Valley locations, working closely with our clients. For detailed job descriptions, please visit the [careers page](#) for our current job vacancies below:

- Senior Business Analysts
- Senior Java/J2EE Software Engineers
- Mid-level Java/J2EE Software Engineers
- Junior-level Java/J2EE Software Engineers

See the <http://www.kuali.org/jobs> for the most up-to-date information on all job opportunities.

## **UPCOMING EVENTS**

NACUBO Annual Meeting

July 9-12, 2011

Tampa, FL

<http://www.nacuboannualmeeting.org/>

CUPA-HR Annual Conference and Expo 2011

September 25-27, 2011

Orlando, Florida.

<http://www.cupahr.org/conference2011/index.asp>

EDUCAUSE Annual Conference

October 18-21, 2011

Philadelphia, PA

<http://net.educause.edu/e11>

NCURA Annual Meeting

November 6-9, 2011

Washington, DC

[http://www.ncura.edu/content/educational\\_programs/conferences/index.php](http://www.ncura.edu/content/educational_programs/conferences/index.php)

**Kuali Days 2011 –Empowering the Community!**

November 14-16, 2011

Indianapolis, IN

<http://www.kuali.org/kd>