



## QUARTERLY NEWSLETTER

March 2011

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### Introduction

Welcome to the March Quarterly newsletter. It's been a busy winter season for the Kuali Foundation and Kuali projects.

We are looking forward to **Kuali Days 2011** in Indianapolis November 14-16, 2011. Because of continued program growth and project interest, and the record breaking 690 attendances at our Kuali Days 2010 Conference in San Diego last November, we expect well over **700 attendees at our next Kuali Days 2011 in Indianapolis!** Detailed articles with a retrospective on Kuali Days 2010 and a look ahead to Kuali Days 2011 are below in the Quarterly News Update.

In this newsletter are multiple articles about the activities of our Kuali Commercial Affiliates (KCAs). Over the past couple of years, the KCA community has evolved into a vibrant set of partners who are critical to the success of our community and its ongoing development, sustainment, and adoptions. We congratulate all our existing KCAs for their good work and we welcome additional partners! Please see details in the Commercial Affiliate in the News, starting on page 10.

We continue to work on getting the word out about the Kuali community. We recently created a video of key leaders in Kuali and posted it visibly on our web site. For those who want to learn more about who we are and what we do, a quick view of that video is a nice introductory overview. That video can be found on the home page at <http://www.kuali.org/>

*Editor's Note: look for a new format in our next newsletter edition, coming in June. Stay tuned!*

## **New Members and Investing Partners**

### **New Members**

Since our last Newsletter, we have added 4 new members to the KualI community: Boston College, Marshfield Clinic, Ontario College of Art and Design, and Stevens Institute of Technology.

We welcome our new members!

### **New Investing Partners in KualI Projects**

Since our last Newsletter, new partners have joined some of our KualI projects.

With the launch of KualI People Management for the Enterprise, we have 3 new Founding Partners on that project. They are Indiana University, Iowa State University and VivanTech. In addition, San Joaquin Delta College and the City of Bloomington, Indiana are Contributing Partners on KPME.

On the KualI Student project, 1 new partner has joined: North-West University South Africa.

On the KualI Financial System project, University of Connecticut has joined, which brings us to 11 investing partners. The KFS continues to mature with investing partners renewing for long term sustainability.

## **KUALI Project Updates**

### **KualI Financial System**

KualI Financial System (KFS) **release 4.1 is targeted for April 15, 2011**. This release includes several fixes, additional KFS/KC integration points, new functionality for the Endowment Module and a new module for Access Security. The Endowment items are an interface to feed a General Ledger, tickler notices and a few reports. Access Security allows permissions to be applied to specific attributes within the application. Access Security is the first major contribution to the KFS core code base from an outside development effort. rSmart developed this functionality with input from other KFS partners.

The KFS Technical Committee will begin meeting in March 2011. The KFS Technical Committee is formally responsible for establishing and recommending best practices throughout KFS. In addition to overseeing patch cycle management and upgrade paths, they are also responsible for analyzing and recommending which minor and major contributions are ready for

a release and for providing technical guidance to the KFS Functional Council (KFFC) on KFS Roadmap items. They are informally responsible for advising contribution projects as they progress from research and development to production-ready maturity.

Upon release of KFS 4.1 the project will focus on our next release and beyond. Travel and Entertainment and the Contracts and Grants Billing module are major contributions in development outside of the KFS Project. Both have been accepted by the Kualu Financial Functional Council (KFFC) to be incorporated to the baseline code as soon as possible. In addition, we continue to develop a suite of test scripts and a process for functional testing of the application. Some of our goals for this effort include: to develop the process to build and maintain scripts with the least amount of resource overhead and to provide this suite to implementers.

We are also pleased to recognize another implementation of KFS at Michigan State University in January 2011. Their implementation was a success and the functional users are very pleased with the functionality. The community is excited to see so many successful adoptions and we look forward to more in 2011.

## **Kuali Coeus**

**Kuali Coeus 3.0 was released on November 6<sup>th</sup>, 2010.** KC 3.0 includes a robust set of Institutional Review Board (IRB) functionality that many schools are excited to begin using. In addition to delivering the IRB module, KC 3.0 also includes numerous fixes and enhancements to the KC 2.0 Awards and Budget functionality. **A KC 3.0.1 patch release was made available on December 17<sup>th</sup>, 2010.** This patch primarily included fixes to issues with select report printing. It also included demo data scripts that enable implementers to populate a database that mimics KC test environments with a working quickstart user, sample code tables, and some transactional documents.

Numerous implementations are underway with Kuali Coeus. Many KC partner institutions have begun their KC implementation projects. A list of implementation plans can be found at <http://www.kuali.org/kc/implementations>. As these implementations are underway, many good discussions are taking place on the KC implementers collaboration lists. The true experts on Kuali Coeus participate in these discussions and share their answers with everyone. If you're interested in joining one of the KC collaboration lists, you can find out more at <http://www.kuali.org/kis/collabs>. There you will need to create a Kuali Information System account to join and begin participating.

One other item of note, implementation has begun for one of the first schools *not* involved in the original KC project, University of Arkansas.

The Coeus and Kuali communities continue to work together towards meeting our goals of delivering high quality research administration software to higher education. The KC

governance process now reflects this convergence with the recent formation of the **Kuali Coeus Community (KCC)**. The KCC is the sustainability organization whose mission is to create, maintain and support a robust electronic solution to manage all components of research administration.

The Kuali Coeus team is now working on the next release, KC 3.1. This release brings KC closer to providing functional equivalence with Coeus 4.5 for the Award, Budget, and Proposal Development modules. KC 3.1 will be released in June/July 2011. The next major release of KC, KC 4.0, is targeted for Q4 2011 and 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 Kuali Coeus 5.0 release.

There is still much work to be done. The KC team continues to make steady and consistent progress towards functional equivalency with Coeus 4.5. It is great to see the KC community achieving results through effective collaboration. The resulting software is already getting very positive reviews from those institutions beginning their implementations or simply taking KC for a test drive!

## **Kuali Student**

Earlier this month, the Kuali Student Project announced that the **first release of Kuali Student Curriculum Management (version 1.1) is now available to the general public**. Delivery of this software release represents an important milestone for the Kuali Student (KS) community, a community led by 12 partner colleges and universities. In addition to innovative curriculum management capabilities, this initial release represents the availability of the technical and conceptual foundation upon which the entire suite of the Kuali Student system will be built going forward.

Kuali Student Curriculum Management may be used by any institution of higher education looking for a solution to transform its current curriculum management processes. KS community members University of California, Berkeley and University of Maryland, College Park, are currently implementing the software. San Joaquin Delta College and Boston College are implementing a Proof of Concept.

“This release of Kuali Student Curriculum Management to the general public is an important milestone, not only because it is the foundation for all future Kuali Student systems development, but because institutions can begin to adopt this solution now in preparation for future KS products. Because of the architecture of Kuali Student, a phased approach that allows each new module to integrate with existing modules of a student system suite is a viable strategy,” said Bill McLean, chair of the Kuali Student Project Board and Associate Vice

President for Academic Services, University of Maryland College Park. “The University of Maryland College Park is taking this approach.”

KS Curriculum Management controls the creation and management of Learning Units (LUs)-- any learning-related activity that needs to be tracked by the institution or the learner. Learning units may range from very general (a degree program) to very specific (a class assignment). KS Curriculum Management addresses the creation, approval, and management of traditional curriculum such as courses and degrees. This includes developing and approving new Learning Units and making simple or substantive changes to existing Learning Units.

**Key features of this release include the following components:**

- Integrated management of courses, programs, and learning objectives
- Integrated workflow
- Rules management
- Customizable fields
- Analysis capabilities

For more information about Kuali Student Curriculum Management 1.1 go to:

<http://kuali.org/ks/releases>

Now that KS Curriculum Management 1.1 is delivered, the Kuali Student project team is diligently working on development of the next product – **KS Enrollment Management**.

**Kuali Rice**

Since the last newsletter, Rice has released both 1.0.3 and the patch release 1.0.3.1. Rice 1.0.3 included new items such as KIM improvements, RESTful service enhancements, field-level help for individual maintenance documents, as well as over 140 bug fixes. Work on the next release of Rice is progressing, including collaboration with Kuali Coeus and Kuali Student via cross-project teams on KRMS (Kuali Rules Management System) and KRAD (Kuali Rapid Application Development).

Rice 2.0 is the next release. It is our version compatibility release! The Application Roadmap Committee (ARC) recently voted for Rice 1.1 to become Rice 2.0 in order to reflect the significant architectural changes introduced by modularity, middleware version compatibility, and KRAD.

Rice continues to grow from just a handful of developers by staffing key project roles! After a thorough search process, Jessica Coltrin was selected as the full-time Project Manager for Rice. Other changes include a move of the Director of Enterprise Infrastructure, Farooq Sadiq, and his responsibilities from the Kuali Foundation to Kuali Rice to consolidate cross-project technical

resources in one team. Several developers and a new business analyst have also been added to the Rice team. We are still recruiting for a UX Architect, Configuration Manager, and Technical Support Specialist.

### **Kuali Open Library Environment (OLE)**

Kuali OLE development is off and running! OLE's first release, code-named Eno (for the river that runs near OLE partner North Carolina State), is due the end of June 2011. Eno will be a non-public release intended to demonstrate due progress to the Mellon Foundation and our interested constituents. **OLE's first public demonstration is scheduled for April 5, 2011 at the CNI Conference in San Diego.** This demonstration will illustrate OLE's ability to ingest records from a publishing vendor, generate a requisition, create a purchase order, and send that purchase order to the vendor.

Actual OLE coding began on February 1, 2011 with development partner, HTC Global Services. HTC staff fought January snow storms to take Rice and KNS training and then huddled with OLE Core Team members in Bloomington, Indiana the first 2 weeks of February to start coding. Most coding is now taking place in Chennai, India. OLE's decision to utilize KFS as the core for the financial related processes in OLE was critical to the rapid deployment of demonstration code.

The Kuali OLE Core Team is now comprised of Kathy Gerdink--Lead Business Analyst, Lydia Reid--Data Architect, Rich Slabach—QA Manager, Carla North—Operations Manager, and Brad Skiles—Project Manager. For more updates, please go to the Kuali home page at [www.kuali.org/ole](http://www.kuali.org/ole).

### **Kuali Ready**

Kuali Ready announced the general availability of our continuity planning service this past quarter. This is a major achievement and milestone for the Project. We are currently planning our next release with additions prioritized by the founding partners. **With 55 subscribing institutions** and growing, the Project is focusing on scalability and sustainability. During the current quarter, we will be activating our fourth hosting site, exploring additional hosting options, and hiring a Product Manager.

### **Kuali People Management for the Enterprise (KPME)**

November marked the kickoff of one of the newest Kuali Projects, Kuali People Management for the Enterprise or KPME. KPME will be an open-source; comprehensive **HR/Payroll system**

built for Higher Ed, by Higher Ed and its collaborative commercial partners, using the proven Kuali model for multi-institution, community source development with commercial support. Key components for KPME will include:

- Payroll and Pay Calculation engine
- HR Core Transactions, which leverage Kuali Rice Workflow, including Position Activities, Person Activities, Employee Activities, and Labor Ledger Processing
- Benefits Administration
- Position Management
- Time/Attendance
- Leave Management
- Other value-added components

Although November marked the official kickoff of the KPME project, a great deal of collaboration has happened leading up to that date. In fact, our first module release of Kuali Time and Attendance is targeted for July 2011, with Leave Management expected to follow later in the year. Planning is underway for other modules as we recruit new members to join the KPME Project. Founding partners include Indiana University, Iowa State University and VivanTech along with participation from San Joaquin Delta College and the City of Bloomington Indiana. You can find more information about the KPME project at <https://wiki.kuali.org/display/KPME/Kuali+People+Management+for+the+Enterprise+Home>

If you are interested in joining this project, please contact Maury Hope, Chair of the KPME Project Board, at [mmhope@mail.iastate.edu](mailto:mmhope@mail.iastate.edu).

## Quarterly News Update

### Kuali Days 2010 Drew a Record Attendance

The Kuali community gathered in San Diego last November for Kuali's ninth conference, Kuali Days 2010: From Theory to Practice, which included three packed days of community-driven presentations, workshops, showcases, receptions and social events. **This was Kuali's largest event to date, drawing a record number -- 690 attendees from 115 organizations** around the world.

Kuali Days 2010 was appropriately themed From *Theory to Practice*, and the explosion of Kuali implementations demonstrate that the community source software development model is no longer a theory for the enterprise, but rather a real path to tangible success for colleges and universities.

Kuali Days 2010 speakers included Dr. Patrick Burns from Colorado State University (CSU), who illustrated CSU's real experience implementing the Kuali Financial System at an amazingly low cost with the help of the Kuali "Community with a capital C." Dr. Brad Wheeler from Indiana University highlighted how far Kuali has come and provided vision for the opportunities and challenges that lie ahead. Dr. Paul N. Courant, University of Michigan, used his keynote to illustrate how the work of the Kuali community serves the larger context of openness in higher education and its impact on society.

"I was very impressed by the size and zeal of the community," said Philip Wright from Brock University, a new Kuali Foundation member from Ontario, Canada, whose technical and functional teams were attending Kuali Days for the first time. "We got a lot of invaluable information, made strong connections in the community, and are going back home very excited to continue down the Kuali path."

This year, for the first time, Kuali used a Call for Proposals process to solicit presentations from the community. "The community came out in amazing force, submitting many more proposals than our planning committee expected," said Kymber Horn from the University of Arizona, who served as Chair of the Kuali Days Conference Committee for Kuali Days 2010. "We were absolutely thrilled, and the enthusiasm we saw in the Call for Proposals process translated into a conference with very high energy!"

### **Kuali Presents Awards to Outstanding Contributors**

The Kuali Community has a tradition of recognizing community leaders who have made particularly important contributions to Kuali by awarding Golden Chopsticks during the annual Kuali Days conference. At Kuali Days 2010 in San Diego last week, Golden Chopsticks were awarded to four individuals who have each had a profound impact on Kuali.

Chris Coppola, co-founder, CEO of rSmart, won the Golden Chopsticks award due to his exemplary work as a Kuali Commercial Affiliate. A true role model for other vendors, Chris has shown that there is "another way" -- whether it's about how we build, sustain and implement software, or about the relationship between higher education and their commercial partners. Chris has fostered partnerships in the community, demonstrating a deep understanding of the culture and needs of higher education. Chris has been deeply engaged in Kuali since its conception, helping to establish the strategy and process for a new licensing model for the community, and serving as the first Chair of the Application Roadmap Committee.

A second award went to three people whose insight and hard work led to the creation of Kuali's powerful middleware and rapid development environment, and shared services infrastructure, name "Kuali Rice."

Brian McGough, the Director of Enterprise Services, Integration and Delivery at Indiana University, and Aaron Godert, the Manager of Enterprise Integration and Vendor Applications at Cornell University, were lead developers of the first releases of Kuali Financial System. As

interest in creating new Kualo projects brewed, Brian and Aaron recognized that it made sense to create a set of shared services among different Kualo applications. This architectural epiphany led to the creation of a full-fledged Kualo project, Kualo Rice, that serves as middleware for the other Kualo projects (handling things like workflow, identity management, and messaging and notification), and a rapid development environment that can be used to quickly create very useful applications.

As the Kualo Rice project was officially chartered and funded, Eric Westfall, Enterprise Software Architect at Indiana University, emerged as the Rice guru, becoming the Project Manager and Lead Developer for Kualo Rice. Recently, he was recognized by being named the Kualo Rice Lead Architect. Working on the vision of Brian and Aaron, Eric led the transformation of Kualo Rice into a true, self-sustaining project with world-class developers.

The Kualo applications rely heavily on the infrastructure provided and sustained by the Kualo Rice project, so this award to Brian, Aaron, and Eric is much deserved.

### **Save the Date for Kualo Days 2011**

**Kualo Days 2011** will take place November 14-16, 2011 at the JW Marriott in beautiful downtown Indianapolis. Kualo Days is the annual Kualo conference where current and potential members meet to share information with the community at large. The conference is designed for all levels of interest, so if you're new to the community or a long-time member, mark your calendar now and plan to join us! Teams from all seven projects, including the Kualo Financial System, Kualo Coeus, Kualo Student, Kualo Open Library Environment (OLE), Kualo Ready, Kualo People Management for the Enterprise, and Kualo Rice, will be there in full force. We are pleased that Dr. Michael McRobbie, President of Indiana University, will be our Wednesday Keynote Speaker. Dr. McRobbie, a native of Australia, was IU's first CIO and subsequently its VP for Research and then Interim Provost for Bloomington. He is a world renowned leader in research and technology, and he strongly supported the Kualo community since its birth. He is sure to inspire and motivate with his distinct views as a university president who is leading in a time of great change.

Attendees will love the venue. The new JW Marriott in downtown Indianapolis opened last month and it is truly a 21st century hotel. It is also within a few steps of hundreds of shops, pubs, restaurants, museums, parks, and scenic walks.

The conference committees, led by Emily Deere from UC San Diego, are working hard to put together a dynamic program for all members of the Kualo community. A call for papers will be announced in the next month along with information about registration and booking the hotel. If you would like additional information or to be a part of the planning committees, please contact Emily Deere at [edeere@ucsd.edu](mailto:edeere@ucsd.edu), who also stated "We are excited about the event and expect it to be one of the largest attended and most energetic Kualo Conferences to date!"

## **Director of Communications and Collaboration welcomed to Kual**

On March 14, 2011, Pat Slabach joined the Kual Foundation team as *Director of Communications and Collaboration*. In this role she will work with the Foundation and its projects to develop, enhance, and sustain communication and collaboration processes for all constituents, both existing and potential, in the Kual community. As Kual has matured, with many projects in various phases of the life cycle, having the most effective mechanisms for disseminating information, collecting factual data about our activities, and providing the most up-to-date methods for effectively being “virtual” continue to be important keys to Kual’s success. We look forward to having Pat lead these efforts.

Pat brings to the position many years of experience in IT as Senior Analyst and Marketing Associate and as a Project Manager. Most recently, she was with Indiana University, serving as a Project Manager for the Office of Research Administration and in charge of implementing Kual Coeus. Formerly, she held positions at Eli Lilly and Co. and at HP Products in Indianapolis. She holds a B.A. in Communications from Indiana University.

## **"Kual Day @ Cornell" Event Draws Big Crowd**

In January 2011, Cornell University held a very successful event called "Kual Day @ Cornell" to help familiarize the Cornell campus with the Kual Financial System. The keynote session drew 625 people, who heard Joanne DeStefano lay out the reasons Cornell needs KFS, Ted Dodds and Brad Wheeler explained how it’s a tailored fit for Cornell, and Troy Fluharty spoke on what to expect based on how smoothly implementation went and how well KFS has been received at Colorado State University.

Things didn’t stop there. Rounding out the top five most popular sessions, in addition to the keynote, 600 people attended In My Life: A Day in the Life of a KFS User, 467 attended the two Financial Processing sessions, 340 attended the two sessions on Information Delivery and Reporting, and 275 attended the Purchasing session.

Throughout the day in 14 different sessions, KFS team members shared concrete examples of how the campus will use the system after it goes live on July 1. They demoed e-docs, workflow, and the new information dashboard, highlighting the features that will make financial work happen more swiftly and with fewer errors than in today’s world.

More information can be found at <http://kual.org/node/535>.

## **Commercial Affiliates in the News**

### **Commercial Affiliate Profile: HTC Global Services**

**HTC Global Services (HTC)** is a leading global Information Technology (IT) and Business Process Outsourcing (BPO) solutions provider with headquarters in Troy, Michigan and delivery centers in USA, India, and Malaysia. HTC’s global employee strength is over 4,000 and 2009 US revenues were \$111 million.

Established in 1990, HTC is an Inc. 500 Hall of Fame company. HTC has over 19 years of experience in providing IT services to the private as well as government sector customers across the US. Clients in higher education include Indiana University, Michigan State University, UC Riverside, Duke University and Univ. of North Carolina. HTC offers Application Development and Maintenance, Application Reengineering & Migration, Testing Services, Business Intelligence, Enterprise Solutions (SAP, Oracle), Enterprise Content Management, Staff Augmentation Services and Business Process Outsourcing Services. HTC is a quality conscious organization with documented procedures and processes that are assessed to SEI CMM Level 5 and certified to ISO 9001:2008, ISO 27001 (ISMS).

HTC is a Kualu Commercial Affiliate, and has established a Kualu Center of Excellence that has combined its strengths in Java and open source technologies with its expertise in developing Kualu based solutions to offer product development and application integration services to customers in the Kualu Community and higher education. HTC is currently engaged in the implementation of the Kualu Financial System at Michigan State University and Indiana University. HTC has been involved in blueprinting business processes, drafting strategy documents, and executing implementation procedures for converting legacy data, interfacing with legacy systems, and enhancing the Kualu Financial System.

### **VivanTech selected as Development Partner for Kualu Contract & Grant Billing Project**

The Kualu Financial System (KFS) community of the Kualu Foundation is pleased to announce the selection of VivanTech as their development partner for phase 1 of the Contract and Grant Billing (CGB) functionality of the Kualu Financial System. VivanTech will provide a turn-key solution based on KFS 4.0. The CGB enhancements are for initial implementation at investing partner sites and eventual integration into the KFS baseline code for public download.

Kualu Contract and Grant Billing will be a robust set of enhancements to the existing Accounts Receivable (AR) module of the Kualu Financial System. The new functionality will automate the routine billing tasks associated with post-award grant administration.

The software is based on the proven post-award research administration system developed by the University of Maryland called BARS (Billing and Accounts Receivable System); just as BARS integrates with Coeus to receive award information, KFS Contract & Grant Billing will include an optional interface with Kualu Coeus to import project and sponsor information. The system scrubs the general ledger for eligible expenses on reimbursable contracts and grants, establishes billing schedules for milestone-based contracts, and tracks eligible expenses on Letters of Credit to facilitate timely and accurate draw downs and reporting.

“We usually get 80% of our invoices generated by the automated batch process. The system also helps us to make accurate LOC draw downs and get funds reimbursed quickly” notes Muddu Salem, University of Maryland senior analyst and BARS developer.

Yaa-Yin Fong, Director of the Office of Research Services at the University of Hawaii, noted that, “automating the generation of contract and grant invoices will give us the ability to manage our billing and letter-of-credit draws more effectively. The collections function of the BARS system will also be a great benefit to the university. Therefore, the decision to participate in the Contract and Grant Billing effort was not hard to justify.”

KFS Contract and Grant Billing investing partners include: Colorado State University, Cornell University, Iowa State University, Michigan State University, the University of California Davis, the University of Connecticut, the University of Maryland, and the University of Hawaii. Opportunities to invest are still available; investors receive access to interim code releases, early access to the completed code, and the opportunity to contribute toward software requirements. Interested institutions should contact Eben Sutton, KFS AR Lead Subject Matter Expert, at [esutton@ucdavis.edu](mailto:esutton@ucdavis.edu) or 530.752.5873 for more information.

### **rSmart selected to develop KFS Travel and Entertainment Module (TEM)**

The Kualii Financial System (KFS) community of the Kualii Foundation is pleased to announce the selection of rSmart as their development partner for the **Travel and Entertainment Module (TEM)** of the Kualii Financial System.

The KFS TEM is an electronic document processing application for travel authorization and capturing expenses and reimbursements for travel, entertainment and moving & relocation. The module is integrated with Financial Processing Disbursement Voucher (DV), Payment Disbursement Processor (PDP) and Accounts Receivable (AR) and passes the post travel request processes to the existing KFS functionality.

Travel Authorization is a process to request travel authorization and advances from the required approvers. When the Travel Authorization document is finalized, the encumbrance will be generated and the travel advance is paid to the traveler. If the user requests the advances, a Disbursement Voucher and AR Invoice document are spawned to request a payment and to track receivables. The Entertainment tracking process will capture required data, route for approvals and populate data to reimbursement reports.

Travel and Entertainment Reimbursement is a process to request reimbursement based on the travel or entertainment request. When the Reimbursement document is finalized, the encumbrance is liquidated and the reimbursement amounts are posted to AR via Cash Control and Application documents. The DV can be generated from the report.

Karen Osborne, the Travel and Entertainment Supervisor at UC Davis, who is leading this Kualii project, said: “We are very excited to have rSmart develop the Travel Expense module for the Kualii partners and the community. The module will capture many aspects of Travel, Hosting Events, and Relocation and will be able to book travel, reimburse individuals, pay vendors, include all corporate and ghost card transactions into reports into a more streamlined process.”

The development of the TEM module is broken down into three distinct milestones. When completed Kuali TEM will provide the following functionality:

- # Travel Authorization process
- # Third-party payment (pre and post-trip)
- # Generate travel and entertainment payments via Disbursement Voucher and PDP
- # Corporate and CTS card imported data and payment processes
- # Refund Overpayment
- # Entertainment authorization and tracking
- # Travel & Entertainment Reimbursement process
- # Track of Travel using Accounts Receivable (AR) functionality
- # Create and maintain traveler profiles
- # Move and Relocation authorization and tracking
- # External Agency data import, i.e., Expedia, Orbitz

rSmart was chosen to be the development partner on this project because of their deep commitment to the success of the Kuali community, the expertise they bring in the Kuali technology stack, their strong leadership and collaboration methodology, and their commitment to meeting requirements and deadlines provided by the partner schools.

KFS Travel and Entertainment investing partners include: University of California Davis, Colorado State University, Cornell University, Indiana University, Michigan State University and the University of Connecticut. Interested institutions should contact Karen Osborne, KFS Travel and Entertainment Supervisor, at [kaosborne@ucdavis.edu](mailto:kaosborne@ucdavis.edu), 530.757.8541 for more information.

### **HTC Chosen as Kuali OLE Development Partner**

Kuali Foundation announces the selection of **HTC Global Services** as the development partner for the Kuali Open Library Environment (OLE) project.

The Kuali OLE (pronounced oh-LAY) project is a partnership of nine top research libraries and consortia to develop a community-source library management system. The system will be freely distributed under the Educational Community license and supported in part by a grant from the Andrew W. Mellon Foundation. Its design is based on a thoroughly re-examined model of library operations, and its technical design uses a service-oriented architecture (SOA) to better enable connectivity with many other academic and administrative systems.

The OLE project selected HTC for its expertise in developing enterprise-scale systems for higher education using Kuali and open source technologies. "HTC is excited about its participation in the Kuali OLE project where it can leverage its knowledge and experience in online publishing, higher education, content management and campus management systems to play a key role in building this community-source software system," says **Vikas Bhutada**, executive vice president of HTC Global Services.

"Kuali OLE can help libraries replace their current, expensive library automation systems with enterprise level software that will allow libraries to effectively manage and provide easy access to their collections. HTC will be a key partner in developing and implementing this vision, and we are very happy to be working with an experienced development partner," said Brad Skiles, Project Manager of the OLE project.

HTC's technical resources will work onsite at Indiana University in system design and quality assurance activities. Additional teams will be located at HTC's delivery centers in Michigan and India.

As an OLE development partner, HTC will also play an active role in advocating and promoting the mission and vision of the Kuali Foundation and its other community-source projects including the Kuali Financial System, Kuali Coeus for Research Administration, Kuali Student, and other systems for higher education.

### **New Job Postings in the Kuali Community**

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

**The Kuali Ready Product Manager is** needed for focus on functional product planning, execution, and communication of those plans throughout the product lifecycle. This is a multi-faceted role that requires interaction with key stakeholders to define the product vision, functional product strategy, and provide customer support. <http://kuali.org/node/587>

**The Kuali OLE project is recruiting for a Senior Technical Architect.** This position can work from Indiana University, Lehigh University or the University of Florida and will report to the Kuali OLE Project Manager. This position will serve as a key component of the Kuali OLE Core Team. See <http://kuali.org/node/410> for more information.

**The Kuali Rice project is currently seeking a junior-level Technical Support Specialist** to support the infrastructure for the development of the Kuali enterprise class family of software products including Kuali Rice, Kuali Financial System, Kuali Coeus, Kuali Student, Kuali OLE, Kuali Ready, Kuali People Management for the Enterprise, and other incubation projects. See <http://kuali.org/rice-jobs/tech-support> for more information.

**The Kuali Rice project is currently seeking a Configuration Manager** to support the development of the Kuali Rice enterprise class middleware suite which serves as the foundation of the Kuali family of products. <http://kuali.org/rice-jobs/cm>

**The Kuali Rice project is currently seeking a User Experience Architect** for the enterprise class middleware suite which serves as the foundation of the Kuali family of products. See <http://kuali.org/rice-jobs/ux> for more information.

See the Kualo website for all jobs and the most up-to-date information <http://www.kuali.org/jobs>

## Upcoming Events

Higher Education Data Warehousing (HEDW) Conference

April 2-5, 2011

Seattle, Washington @ UW

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

CNI Spring 2011 Membership Meeting

April 4-5, 2011

San Diego, CA

<http://www.cni.org/tfms/2011a.spring/>

Kuali Community Workshop (Note: Invited Participants only)

New Orleans, LA

April 24-29, 2011

[Kuali Community Workshop Spring 2011](#)

EDUCAUSE Enterprise and Information Technology Conference

May 16-18, 2011

Chicago, IL

<http://www.educause.edu/ENT11>

Jasig's Spotlight on Open Source

May 22-25, 2011

Westminster, CO

<http://www.jasig.org/jasigs-spotlight-open-source>

Advance CAMP: Identity Services Summit III

May 25-27, 2011

Westminster, CO

<https://spaces.internet2.edu/display/ACAMPIdSummit2011/Home>

NACUBO Annual Meeting

July 9-12, 2011

Tampa, FL

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

Sakai Annual Conference

June 14-16, 2011

Los Angeles, CA

<http://sakaiproject.org/news/sakai-conference-north-american-venue-announced>

American Library Association Annual Conference and Exhibit  
June 23-28, 2011  
New Orleans, LA  
<http://www.alaannual.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**  
November 14-16, 2011  
Indianapolis, IN  
<http://kuali.org/kd/kd2011>