

CCCEUS  
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2011  
USER CONFERENCE  
AUSTIN - TEXAS

PROGRAM  
& SESSION  
SCHEDULE

*Please give special thanks in appreciation of this year's Planning Committee Members and Sponsors whose efforts have made the 2011 Quali-Coeus User Conference a success...*

**2011 User Conference Planning Committee**

**Tim Schleicher, Director**  
*Office of Research Information Systems  
Johns Hopkins University*

**Zach Friedman, Systems Analyst/Programmer**  
*Office of Research Administration and Advancement  
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**Chris Tompkins, Purdue ERA Program Manager**  
*Sponsored Program Services  
Purdue University*

**Kelly Welsh, Administrator**  
*Department of Epidemiology  
Johns Hopkins University*

**2011 User Conference Sponsors**



# WELCOME

## Welcome to Austin, Texas and the 2011 Quali Coeus User Conference!

This year's conference has attracted a record number of attendees from all over the United States. Representatives from universities, hospitals, research labs and our Industry partners have gathered to share their knowledge of, experience with, and strategies for making Coeus and Quali Coeus successful at their organizations.

The conference sessions have been developed by the user community to help attendees evaluate the functionality of both Coeus and Quali Coeus. Technical and functional sessions, and system demonstrations, will be offered over the next two days, allowing attendees to learn as much as possible about these research administration systems and future enhancements. On Wednesday, subcommittee meetings will be held where attendees can become part of focused discussions on how various institutions are using Coeus and Quali Coeus and how the various modules should function given the current business environment and ever changing governmental regulations. But most importantly, this conference provides an opportunity to network with your colleagues to share best practices and gain exposure to tips and tricks for using the systems more effectively.

At the end of the day, continue networking with your colleagues by enjoying the amazing city of Austin...the Live Music Capital of the World. At every corner you will hear the sounds of rock, blues, jazz, country, classical and Latin music coming from the most wonderful restaurants and bars in Texas.

Again, on behalf of the Program Committee, welcome to the

2011 Quali Coeus User Conference.

With Appreciation,

Tim Schleicher, Chair  
2011 Quali Coeus User conference Planning Committee

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## SUNDAY, MARCH 27, 2011

REGISTRATION, 12:00PM – 5:15PM – BALCONY  
SYSTEM DEMONSTRATIONS, 1:00PM - 2:45PM  
AFTERNOON BREAK, 2:45PM - 3:15PM  
SYSTEM DEMONSTRATIONS CONTINUED, 3:15PM - 5:15PM  
WELCOME RECEPTION, 5:30PM- 7:30PM

## MONDAY, MARCH 28, 2011

CONTINENTAL BREAKFAST, 7:30 - 8:30AM  
CONFERENCE OPENING PLENARY SESSION, 8:45 - 10:00AM  
MORNING BREAK, 10:00AM - 10:30AM  
BREAKOUT SESSIONS, 10:30AM - 11:45PM  
LUNCH, 12:00PM - 1:00PM  
BREAKOUT SESSIONS, 1:15PM - 2:30PM  
AFTERNOON BREAK, 2:30PM - 3:00PM  
BREAKOUT SESSIONS, 3:00PM - 4:15PM

## TUESDAY, MARCH 29, 2011

CONTINENTAL BREAKFAST, 7:30 - 8:30AM  
BREAK OUT SESSIONS, 8:45 - 10:00AM  
MORNING BREAK, 10:00AM - 10:30AM  
BREAKOUT SESSIONS, 10:30AM - 11:45PM  
LUNCH, 12:00PM - 1:00PM  
BREAKOUT SESSIONS, 1:15PM - 2:30PM  
AFTERNOON BREAK, 2:30PM - 3:00PM  
BREAKOUT SESSIONS, 3:00PM - 4:15PM  
CONFERENCE WRAP-UP PLENARY SESSION, 4:15PM - 5:00PM

## WEDNESDAY, MARCH 30, 2011

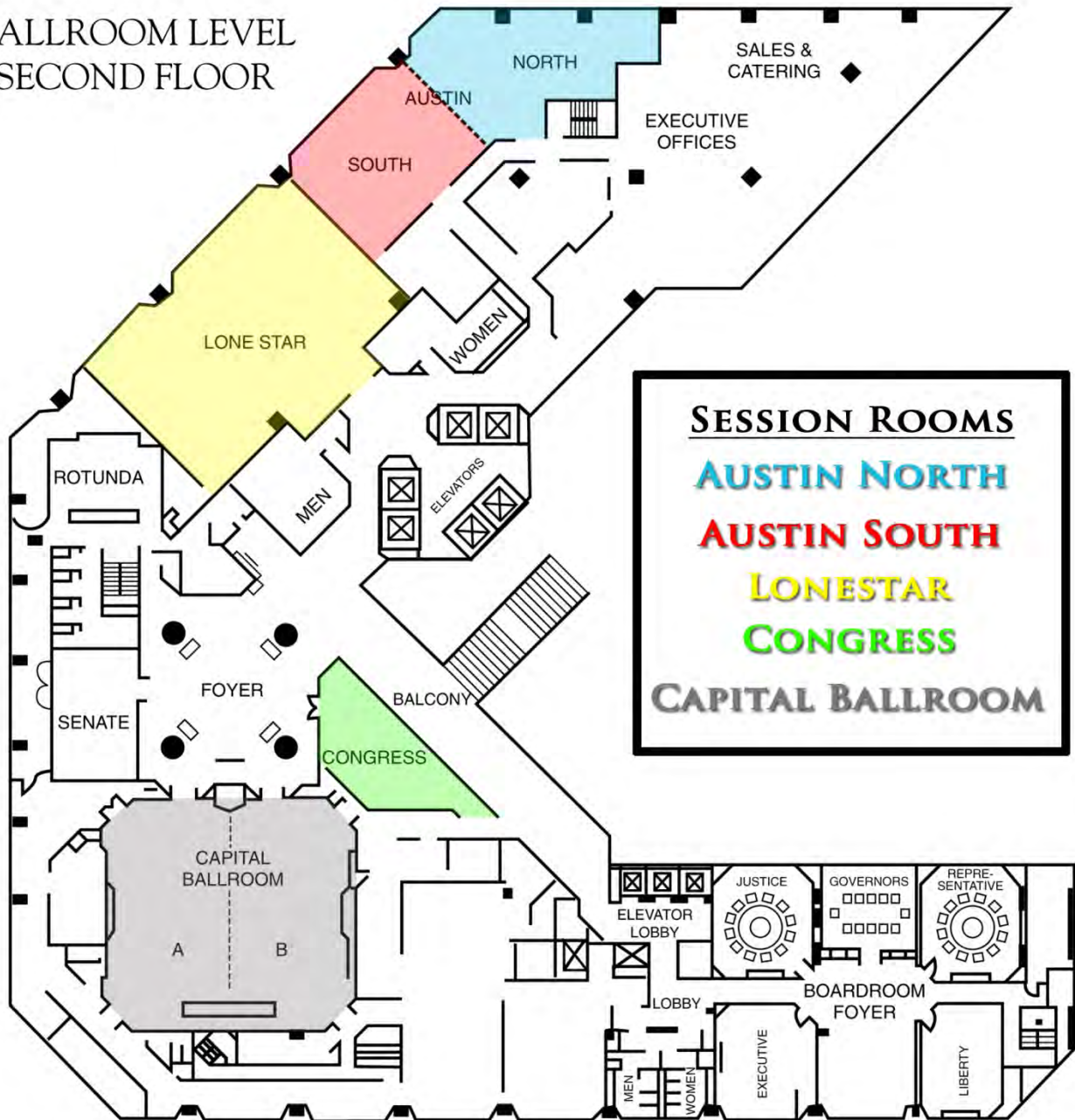
KC DEVELOPERS MEETING, 8:30 – 4:00PM  
COEUS SUBCOMMITTEE/ KUALI COEUS SME MEETINGS  
PRE-AWARD, 9:00AM - 4:00PM  
POST-AWARD, 9:00AM - 4:00PM  
COMPLIANCE, 9:00AM - 12:00PM  
TECHNICAL, 9:00AM - 12:00PM  
MEMBERSHIP & OPERATIONS, 9:00AM - 12:00PM

# Session Room Locations

OMNI  AUSTIN HOTEL  
DOWNTOWN

## CONFERENCE SPECIFICATIONS

BALLROOM LEVEL  
SECOND FLOOR



**SESSION ROOMS**

- AUSTIN NORTH**
- AUSTIN SOUTH**
- LONESTAR**
- CONGRESS**
- CAPITAL BALLROOM**

ROOM MAP

# Session Schedule

## SUNDAY, March 27, 2011

TIME	SESSION	LOCATION
12:00pm - 5:15pm	Conference Registration	BALCONY
1:00pm - 2:45pm	Coeus System Demonstration (IRB & IACUC)	BALLROOM A
	Kuali Coeus System Demonstration (Proposal Part I & II)	BALLROOM B
	BIRT Training Session	LONESTAR
<b>Afternoon Break 2:45pm - 3:15pm</b>		
3:15pm - 5:15pm	Coeus System Demonstration (Proposal & Award)	BALLROOM A
	Kuali Coeus System Demonstration (Award & IRB)	BALLROOM B
	BIRT Training Session	LONESTAR
5:30pm-7:30pm	Welcome Reception	ATRIUM

## MONDAY, March 28, 2011

TIME	SESSION	LOCATION				
<b>7:30 - 8:30am, Continental Breakfast</b>		<b>CAPITAL BALLROOM</b>				
<b>8:45 - 10:00am, Conference Opening Plenary Session</b>		<b>CAPITAL BALLROOM</b>				
<b>10:00am - 10:30am, Morning Break (Sponsored by Vivantech)</b>						
<b>10:30am - 11:45pm</b>	<b>Coeus Proposal Development Training Programs</b> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td>Level: Introductory</td> <td>Session Type: Functional</td> </tr> <tr> <td>System: Coeus</td> <td>Session Format: Panel Discussion</td> </tr> </table>	Level: Introductory	Session Type: Functional	System: Coeus	Session Format: Panel Discussion	<b>AUSTIN NORTH</b>
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System: Coeus	Session Format: Tutorial					
<b>12:00pm - 1:00pm, Lunch</b>		<b>CAPITAL BALLROOM</b>				

# Session Schedule

**MONDAY, March 28, 2011 - continued**

1:15pm - 2:30pm	<b>Award hierarchy designs, a comparative discussion: tracking your sponsored project funding</b>	<b>AUSTIN NORTH</b>	
	Level: Introductory	Session Type: Functional & Technical	
	System: Coeus & Quali-Coeus	Format: Panel Discussion	
	<b>Coeus IRB, Beyond Protocol Creation and Committee Set Up - Part 2</b>		<b>AUSTIN SOUTH</b>
	Level: Advanced	Session Type: Functional & Technical	
	System: Coeus	Format: Tutorial	
	<b>Introduction to Quali Rice</b>		<b>LONESTAR</b>
	Level: Introductory	Session Type: Functional & Technical	
	System: Quali-Coeus	Format: Tutorial	
	<b>Interfacing Quali Coeus with your institutions financial system</b>		<b>CONGRESS</b>
	Level: Intermediate	Session Type: Functional	
	System: Quali-Coeus	Format: Tutorial	
<b>2:30pm - 3:00pm, Afternoon Break</b>			
3:00pm - 4:15pm	<b>Quality Assurance for Coeus and Quali Coeus</b>	<b>AUSTIN NORTH</b>	
	Level: Intermediate	Session Type: Functional & Technical	
	System: Coeus & Quali-Coeus	Format: Panel Discussion	
	<b>The Subcontract Module and Using it Effectively</b>		<b>AUSTIN SOUTH</b>
	Level: Intermediate	Session Type: Functional & Technical	
	System: Coeus	Format: Tutorial	
	<b>Quali Rice Technical and Enterprise Implementation Overview</b>		<b>LONESTAR</b>
	Level: Intermediate	Session Type: Technical	
	System: Quali-Coeus	Session Format: Tutorial	
	<b>Configuring Award Report Notification in Coeus</b>		<b>CONGRESS</b>
	Level: Intermediate	Session Type: Functional & Technical	
	System: Coeus	Format: Tutorial	

# Session Schedule

## TUESDAY, March 29, 2011

TIME	SESSION	LOCATION				
<b>7:30 - 8:30am, Continental Breakfast</b>		<b>CAPITAL BALLROOM</b>				
<b>8:45 - 10:00am</b>	<b>KCC Joint Research Compliance Panel</b> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%;">Level: Intermediate</td> <td>Session Type: Functional &amp; Technical</td> </tr> <tr> <td>System: Coeus &amp; Quali-Coeus</td> <td>Format: Panel Discussion</td> </tr> </table>	Level: Intermediate	Session Type: Functional & Technical	System: Coeus & Quali-Coeus	Format: Panel Discussion	<b>AUSTIN NORTH</b>
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System: Coeus & Quali-Coeus	Session Format: Panel Discussion					
<b>10:00am - 10:30am, Morning Break (Sponsored by Polus Solutions)</b>						
<b>10:30am - 11:45pm</b>	<b>Non-Typical NIH and Non-NIH Proposals in Coeus</b> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%;">Level: Introductory</td> <td>Session Type: Functional</td> </tr> <tr> <td>System: Coeus</td> <td>Format: Tutorial</td> </tr> </table>	Level: Introductory	Session Type: Functional	System: Coeus	Format: Tutorial	<b>AUSTIN NORTH</b>
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System: Kuali-Coeus	Format: Tutorial					
<b>Moving from Coeus to KC (Screen By Screen Compare) - Award</b> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%;">Level: Intermediate</td> <td>Session Type: Functional &amp; Technical</td> </tr> <tr> <td>System: Coeus &amp; Quali-Coeus</td> <td>Format: Demonstration</td> </tr> </table>	Level: Intermediate	Session Type: Functional & Technical	System: Coeus & Quali-Coeus	Format: Demonstration	<b>LONESTAR</b>	
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<b>Grants.gov s2s in Kuali Coeus</b> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%;">Level: Intermediate</td> <td>Session Type: Functional</td> </tr> <tr> <td>System: Kuali-Coeus</td> <td>Format: Tutorial</td> </tr> </table>	Level: Intermediate	Session Type: Functional	System: Kuali-Coeus	Format: Tutorial	<b>CONGRESS</b>	
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System: Kuali-Coeus	Format: Tutorial					
<b>12:00pm - 1:00pm, Lunch</b>		<b>CAPITAL BALLROOM</b>				

# Session Schedule

**TUESDAY, March 29, 2011** - *continued*

1:15pm - 2:30pm	<b>The Good, the Bad, and the Ugly: Kualo Coeus Model Office</b>	<b>AUSTIN NORTH</b>
	Level: Introductory      Session Type: Functional	
	System: Coeus & Kualo-Coeus      Format: Tutorial	
1:15pm - 2:30pm	<b>Coeus IACUC Module – Purdue Planned Configurations and Use</b>	<b>AUSTIN SOUTH</b>
	Level: Intermediate      Session Type: Functional & Technical	
	System: Coeus      Format: Tutorial	
1:15pm - 2:30pm	<b>Overview of System Architecture: Coeus vs KC</b>	<b>LONESTAR</b>
	Level: Intermediate      Session Type: Technical	
	System: Coeus & Kualo-Coeus      Format: Panel Discussion	
1:15pm - 2:30pm	<b>Faculty Compliance</b>	<b>CONGRESS</b>
	Level: Introductory      Session Type: Functional	
	System: Coeus & Kualo-Coeus      Format: Tutorial	
<b>2:30pm - 3:00pm, Afternoon Break</b>		
3:00pm - 4:15pm	<b>Kualo Coeus Implementors Meeting</b>	<b>AUSTIN NORTH</b>
	Level: Intermediate      Session Type: Functional & Technical	
	System: Kualo-Coeus      Format: Panel Discussion	
3:00pm - 4:15pm	<b>KRMS – Making Business Rules Happen for KC</b>	<b>AUSTIN SOUTH</b>
	Level: Intermediate      Session Type: Functional & Technical	
	System: Coeus & Kualo-Coeus      Format: Tutorial	
3:00pm - 4:15pm	<b>Planning a Coeus Data Migration</b>	<b>LONESTAR</b>
	Level: Intermediate      Session Type: Functional & Technical	
	System: Coeus & Kualo-Coeus      Format: Tutorial	
3:00pm - 4:15pm	<b>Using Coeus to meet the FFATA requirements: Case studies</b>	<b>CONGRESS</b>
	Level: Intermediate      Session Type: Functional & Technical	
	System: Coeus & Kualo-Coeus      Format: Panel Discussion	
<b>4:15pm - 5:00pm, Conference Wrap-up Plenary Session</b>		<b>CAPITAL BALLROOM</b>

## SUNDAY, March 27, 2011

### System Demonstrations 1:00pm – 2:45pm

**Coeus IRB and IACUC Modules (DEMONSTRATION)** *Presented by: Sabari Nair (Coeus Consortium); Jen Flach(Jenistics, LLC); Chris Tompkins(Purdue University)*

**Kuali-Coeus Proposal Modules Part I & II (DEMONSTRATION)** *Presented by: Tracey Levy, Carey Conover, & Karen Shrode(Indiana University);*

### System Demonstrations 3:15pm - 5:00pm

**Coeus Proposal Development and Award Modules (DEMONSTRATION)** *Presented by: Rosemary Hanlon (Coeus Consortium); David Usher (SUNY)*

**Kuali-Coeus Award and IRB Modules (DEMONSTRATION)** *Presented by: Susan Mundt (University of Arizona); Dan Dwyer(Cornell University)*

## MONDAY, March 28, 2011

### Breakout sessions 10:30am - 11:45pm

**Coeus Proposal Development Training Programs (PANEL DISCUSSION)** *Presented by: Kyle Burkhardt(Princeton University), Claire King(Drexel University), Ellen Morthole(Johns Hopkins University), Jennifer Quinn(Brown University); Ron Schultz(Johns Hopkins University), Dave Usher(SUNY)* - Ever wondered how other schools train their Coeus users? In this session, panel members will discuss the training programs for Premium and/or CoeusLite Proposal Development users at their respective institutions. The challenges of Coeus instruction and user acceptance will also be discussed.

**Coeus IRB, Beyond Protocol Creation and Committee Set Up - Part 1 (TUTORIAL)** *Presented by: Adam Schechter & Kathleen Uscinski(Yale University)* - Attendees in this session will consider their institutional requirements for submitting a protocol to the IRB. Attendees will learn how to develop business rules and routing maps that ensure that the protocol submission is reviewed by institutional oversight committees, authorities and other regulatory reviewers, as required, prior to the protocol being received by the IRB. This session will also focus on system features that can be used to develop a robust data set that supports the institution's reporting and tracking requirements that may extend beyond typical IRB requirements. Examples include, protocols reviewed by external IRBs, using FYI notifications for tracking unanticipated problems, tracking international research and those supported by central grants such as Clinical Translational and Science Awards (CTSA). Finally, the session will include an overview of the lessons learned when deploying CoeusLite into the general research community.

**Getting Kuali Coeus Up and Running: Basic Setup (TUTORIAL)** *Presented by: Claus Niesen & Kristina Taylor(Iowa State University); Allen Akers(Colorado State University)* - In this session we will walk through the technical steps required to install Kuali Coeus "out of the box" including creating the database, preparing configuration files, and connecting to the Grants.gov test server. Common "gotchas" and frequently asked questions will be highlighted. If there is interest and time we will also include tips and tricks for preparing and optimizing the Kuali Coeus environment infrastructure and modifying important parameters to move Kuali Coeus toward a production configuration.

# Session Descriptions

**MONDAY, March 28, 2011 - *continued***

**Coeus Interactive Debugging Techniques (TUTORIAL) Presented by: David Harrison(Brown University), Ben DiMolfetta, WinMill** - In this session, we'll describe the benefits of interactive debugging and tracing techniques for quickly pinpointing and resolving bugs. We will discuss the required software and give a brief tutorial on how to set it up. Then, we will talk about various debugging techniques. Finally, we'll demonstrate by using this setup to find and fix a few bugs.

## **Breakout sessions (3/28) 1:15pm - 2:30pm**

**Award Hierarchy Designs, a Comparative Discussion: Tracking Your Sponsored Project Funding (PANEL DISCUSSION) Presented by: Jennifer Quinn (Brown University); Kyle Burkhard (Princeton University); Claire King(Drexel University); Susan Mundt (University of Arizona); Renee Dolan (Michigan State University); Ron Schultz (Johns Hopkins University)** - This panel discussion will provide insight into the ways the Coeus and Quali Coeus Award Module can represent your award data. Both Coeus and Quali Coeus institutions will demonstrate different levels of the Award Hierarchy in action (Coeus: 2, 3, flexible-Tiers & KC: 3-Tier). Each school will discuss the pros/cons it has encountered with the Tier structure it has chosen as well as demonstrate how a multi-year award, with yearly incremental funding, appears in their specific Award Hierarchy. This discussion will be of particular value to schools planning implementation of either the Coeus or Quali Coeus Award Module.

**Coeus IRB, Beyond Protocol Creation and Committee Set Up - Part 2 (TUTORIAL) Presented by: Adam Schechter & Kathleen Uscinski(Yale University)** - Continuation of discussion for earlier session.

**Introduction to Quali Rice (TUTORIAL) Presented by: Chris Denne(Colorado State University); Chitra Chandran(Michigan State University)** - This session will introduce the fundamentals of Quali Rice. We will cover why Rice is important to Quali Coeus, which Rice configuration to select for your institution and a functional description of Rice's core components and how they are used by Quali Coeus. We will also cover how use Quali Coeus with minimal changes and configuration to Quali Rice.

**Interfacing Quali Coeus with your institutions financial system (TUTORIAL) Presented by: Kaci Foster(Boston University); Philip Infurna(Huron Consulting Group); Mohammed Kousheh(Boston University)** - This discussion will cover the topic of interfacing Quali Coeus with a financial system primarily from a functional perspective. In particular we will discuss how the design at Boston University calls for the use of KC workflow, award hierarchy, and award actions. We will discuss our approach to functional designs, business process flow, testing and rollout plans, high-level technical approach, and system customizations.

## **Breakout sessions (3/28) 3:00pm - 4:15pm**

**Quality Assurance for Coeus and Quali Coeus (PANEL DISCUSSION) Presented by: Jen Flach(Coeus Consortium/KCC); Kyle Burkhardt(Princeton University); Jon Peterson(Colorado State University)** - This session will provide a brief overview of the Quality Assurance processes used by the Coeus Consortium and Quali Coeus Community. We will discuss how Coeus and KC members can leverage project-level processes when conducting QA for your local implementation and present approaches for institution testing of your local Coeus or KC implementation. Approaches for local testing will be presented. Also, we explain how KCC members can report bugs back to the project that were discovered in their local testing.

## MONDAY, March 28, 2011 - *continued*

**The Subcontract Module and Using it Effectively (TUTORIAL) Presented by: Dennis Paffrath(University of Maryland, Baltimore)** - The Subcontract module is a separate and unique module within COEUS. This module provides the user the ability to monitor the outgoing subrecipient agreements from their university. This session will walk you through the Subcontract module and also give you a showing of how the University of Maryland, Baltimore is using the Subcontract Module along with a web based request form.

**Kuali Rice Technical and Enterprise Implementation Overview (TUTORIAL) Presented by: Terry Durkin & Geoff McGregor(Indiana University)** - This session will build on the information presented in the session 'Introduction to Kuali Rice'. The Kuali Rice Architecture will be reviewed and each of the Rice components described from a technical perspective. We will review how Kuali Rice can be used as an enterprise middleware solution to provide role based authorization, identity management, workflow and notifications for Kuali and non-Kuali enterprise systems. We will also discuss how Kuali Rice can be customized to address specific needs of your institution. There will be an opportunity to address your questions.

**Configuring Award Report Notification in Coeus - (TUTORIAL) Presented by: Sabari Nair(Coeus Consortium)** - Award reporting notification module was introduced in Coeus 4.4.2 version. This notification engine is driven through Coeus Scheduler. This session will focus on configuring the award report notification engine in Coeus. We will also look at how an institution can customize this functionality to meet your needs. This session will also cover the basics of Notification engine in Coeus and its configuration.

## TUESDAY, March 29, 2011

### Break Out Sessions (3/29) 8:45 - 10:00am

**KCC Joint Research Compliance Panel (PANEL DISCUSSION) Presented by: Jen Flach(Coeus Consortium/KCC); Amber O'Banion(UC San Diego); Stephanie Roberts(Indiana University); Dan Dwyer(Cornell University); Weiwen Sung(Iowa State University)** - Quality research requires adherence to the highest standards of integrity in proposing, conducting, and reporting research. Being able to effectively manage an institution's multiple areas of research compliance is a challenging necessity. Kuali-Coeus and Coeus have developed research compliance modules in order to help institutions meet their research compliance needs. In this panel discussion, there will be brief presentations (5-10 minutes) from each Kuali-Coeus/Coeus compliance module (IRB, IACUC and COI). Afterward, the discussion will be open to audience questions about how KC or Coeus can help an institution with their various research compliance needs.

**Coeus Local Customizations, Tools and Award summary views (TUTORIAL) Presented by: Robert M Dias(UC San Diego)** - *Local customization to Coeus premium:* Change the attributes of Coeus screen component via XML configuration file. Label changes, add dynamic/static URL, default values, disable/enable fields, color and more. Documentation. *Award summary views for premium:* Different types of drillable summary views can be launched from toolbar. View configuration/changes. *Award calculator tool (Optional):* This is a web based standalone tool that can be used to validate/compute award amounts for correcting modification. This is based on UCSD's award model which resembles to Browns' award model.

# Session Descriptions

**TUESDAY, March 29, 2011 – *continued***

**Moving from Coeus to KC (Screen By Screen Compare) - Proposal Development**

(DEMONSTRATION) *Presented by: Ben DiMolfetta(WinMill Software)* - In this session, watch as experts from Coeus and Kualu Coeus do a side by side comparison of proposal development business processes.

**Ensuring Accurate Coeus Data Entry: Comparative Approaches (PANEL DISCUSSION) *Presented by:***

*Zach Friedman & Vonnice Perkins(University of Maryland, College Park); Tim Schleicher(Johns Hopkins University); Steve Dowdy(MIT)* - In this presentation, we focus on strategies used by various Coeus schools to help ensure that the data entered in Coeus is as accurate as possible. What is considered critical information will vary between institutions. However by discussing strategies used to flag problems or prevent them altogether, we can begin to see trends in how one can identify bad data that needs further scrutiny. Comparative strategies for spot checking Coeus data will be discussed, ranging from using custom manual and nightly reports highlighting problem areas, to validation using Proposal Development business rules and even simply using the built-in Coeus search.

**Breakout sessions (3/29) 10:30am - 11:45pm**

**Non-Typical NIH and Non-NIH Proposals in Coeus (TUTORIAL) *Presented by: Matthew Miller & Alex Galea(Johns Hopkins University)*** - Over the past few months more NIH mechanisms have been able to be submitted through Coeus. We will go through some of these new mechanisms of how to submit through Coeus (and their special quirks).

**Kuali Mobile App for Kualu Coeus Users (TUTORIAL) *Presented by: Shaun Prescott & Yavuz***

*Ozdan(VivanTech)* - Mobile apps for KC provide flexibility and efficiency for KC users needing to approve workflow items on-the-go. Session attendees will see how the Kualu mobile app for KC securely connects users to a university's KC back end via hand-held devices including iPhone, Android Smartphone, and Blackberry Smartphone. Users view their action list data in a form factor designed for the mobile device they are using. The custom mobile application for KC color codes action list items, provides display options, and sorts them based on user preferences. From the mobile app, users can act on items requiring their attention. The panel will discuss the business need that drove the implementation and walk through examples where the audience can see the power in mobility for KC.

**Moving from Coeus to KC (Screen By Screen Compare) - Award (DEMONSTRATION) *Presented by:***

*Ben DiMolfetta(WinMill Software)* - In this session, watch as experts from Coeus and Kualu Coeus do a side by side comparison of award management business processes.

**Grants.gov s2s in Kualu Coeus (TUTORIAL) *Presented by: Jessica Peck, University of Arizona*** - This session

is intended to give intermediate to advanced users a crash course in the Kualu Coeus Grants.gov functional area from general use to navigating available resources and user guides. We'll start by walking through a typical KC proposal to be submitted to Grants.gov via S2S (attaching an opportunity, form printing, passing GG validations, submission, etc). After the brief demo there will also be an introduction to form mapping and an overview of the available mapping resources that help inform users about what drives field mapping in each form. KC guides are based on the current Coeus S2S form user guides and have been adapted and expanded for KC purposes. We'll also be discussing which forms are currently available in the KC 3.0 release and which forms are forthcoming in future releases as we reach functional equivalence with Coeus. Finally, we will discuss implementation concerns regarding Grants.gov and what elements should not be customized and/or changed due to GG mapping logic.

**TUESDAY, March 29, 2011 – continued**

**Breakout sessions (3/29) 1:15pm - 2:30pm**

**The Good, the Bad, and the Ugly: Kuali Coeus Model Office (TUTORIAL) Presented by: Carey L. Conover & Tracey Levy(Indiana University); Karen Shrode(IUPUI)** - The goal of this panel discussion is to provide detailed information (the Good, the Bad, and the Ugly) about the execution of the Kuali Coeus 'Model Office\*' instance at Indiana University. More than one-hundred users, at multiple-campus locations, committed two hours per week for fourteen weeks to test Kuali Coeus proposal development, proposal budget, and Grants.gov functionality. Documentation, training, and system support were provided. Panel discussion participants will receive information about steps they can take to create a 'Model Office' type-environment at their institution; specific mechanisms for recruitment, training, and follow-up with participants; and experience a frank and humorous discussion about setting-up a pre-implementation testing environment. What is 'Model Office?' - a working prototype of the Kuali Coeus system that reflects the production environment as closely as is practically possible. In KCIU Model Office, users create production-like data and validate the effectiveness of the system. By engaging key-stakeholders, Model Office provides a mechanism to obtain feedback, allowing users time to try out the system in a safe, non-production environment. Additionally, Model Office allows the project team to take in user feedback, provide solutions, anticipate issues, and address problems before the production release.

**Coeus IACUC Module – Purdue Planned Configurations and Use (TUTORIAL) Presented by: Chris Tompkins(Purdue University)** - Purdue University has been heavily involved with the development of the new Coeus IACUC module to cover Animal Welfare related protocols and the first Production ready iteration of this module is slated for release in Coeus version 4.4.4. This session will cover the various module configurations (Code Tables/Questionnaires/Business Rules/Routing) that Purdue has identified and initially have built for their intended implementation of this module. Functional usage related to business process and workflow will also be discussed along with creative solutions to challenges related to protocol creation, submission and review. The presentation will have focus on the available system functionality and will not cover specific information related to Federal or University Regulations. Attendee questions and open discussion will be highly encouraged.

**Overview of System Architecture: Coeus vs KC (PANEL DISCUSSION) Presented by: Sabari Nair(Coeus Consortium); Terry Durkin(Indiana University); Ben DiMolfetta(WinMill Software)** - For existing MIT Coeus schools, understanding the technologies upon which both Coeus and KC are built is vital for understanding the work needed to move from one system to another. In this session, you will gain a greater understanding of the technologies used to build both Coeus and KC, and how the software layers within each interact with each other. You will also understand the user interfaces in place for each, which will allow you to make educated decisions regarding deployment and end user training. At the conclusion of this session, participants will: understand how Java Servlets, Java Swing, Java JSP, XML and the database layer comprise the basis for both Coeus and KC; compare the user interface architecture to identify KC user rollout and support tasks; understand KC options for the database layer and how this would affect migration strategies.

# Session Descriptions

**TUESDAY, March 29, 2011 – *continued***

**Faculty Compliance (TUTORIAL) *Presented by: Alex Galea(Johns Hopkins University)*** - Most Institutions, Sponsors, or both require answering specific compliance questions. In most cases, the PI reviews the questions and the preparer answers on their behalf. If challenged, it is difficult to prove the answers really came from the PI. To safeguard this from happening, many institutions create separate processes to indicate PI approval. The Johns Hopkins School of Public Health is working to require faculty to use CoeusLite to answer the compliance questions and also adding them as an approver.

## **Breakout sessions (3/29) 3:00pm - 4:15pm**

**Kuali Coeus Implementors Meeting (PANEL DISCUSSION) *Presented by: Terry Durkin(Indiana University)*** - An opportunity for KC Implementors to meet and share notes about their implementation experiences. There will not be a presentation as part of this discussion, rather an open forum for discussion on progress, issues, knowledge sharing, etc. This session will be moderated by Terry Durkin (KC Development Team).

**KRMS – Making Business Rules Happen for KC (TUTORIAL) *Presented by: Kenton Hensley(Cornell University)*** - The development of KRMS (Kuali Rules Management System) is underway by the Kuali Rice team. This is necessary for functional equivalence to the Business Rules in Coeus. We will discuss the requirements, new terminology, key design decisions and what had to happen to make KRMS generic enough for the Kuali Rice middleware and what has to happen in KC to implement the functionality. You will get a sneak peak at the Rule Authoring environment's user interface and learn about functionality that had to be added (a bonus!?) because of Rice. We will map everything back to Coeus functionality to highlight where differences exist.

**Planning a Coeus Data Migration (TUTORIAL) *Presented by: Ben DiMolfetta(WinMill Software)*** - Using prior experience and best practices, discuss how to plan and implement a migration from one or more existing data sources to Coeus (or KC). Topics includes approaches for accomplishing the following: for each current system, create data mappings from current system(s) to Coeus/KC; establish business processes to confirm how Proposals and Awards would be processed by OSP within Coeus; establish quality assurance processes to confirm how to determine that the data migration is successful; how to review the results of numerous iterations of data migration output data to confirm correctness; and establish business process testing and verification procedures.

**Using Coeus to meet the FFATA requirements: Case studies (PANEL DISCUSSION) *Presented by: Zach Friedman & Vonnice Perkins(University of Maryland, College Park); Carol J. Wood(MIT); Peggy Pobst(Vanderbilt University)*** - With the new Federal Funding Accountability and Transparency Act (FFATA) reporting required by the federal government, additional information is now required to be reported for qualified grants. Join us for presentations of how several Coeus schools plan to use Coeus to keep track of and assist in reporting this information.

# Subcommittee Agendas

**Wednesday, March 30, 2011**

TIME	SESSION	LOCATION
9:00am - 12:00pm	Pre-award Subcommittee	Lonestar
	Post-award Subcommittee	Austin South
	Compliance Subcommittee	Capital Ballroom
	Technical Subcommittee	Congress
	Membership & Operations	Rotunda
12:00pm - 1:00pm Lunch		
1:00pm - 4:00pm	Pre-award Subcommittee	Lonestar
	Post-award Subcommittee	Austin South

## **PRE-AWARD SUBCOMMITTEE - AGENDA**

### **1) Welcome & Overview:**

- a) Overview of the structure and history of Coeus Subcommittee & KC SME Groups
- b) Discussion of the purpose of subcommittees, how members participate in subcommittees, and the benefits of involvement

### **2) Open Forum Discussion - Creative Solutions and How Is Your Institution Using Coeus/KC**

- a) Business Rules: What type of business rules has your University developed? (Validations to reduce Proposal Development errors, Notifications, or other creative solutions)
- b) How is questionnaire used at your institution (questionnaires and/or questions that you added)
- c) Routing & Approval: How does your institution utilize this functionality and what type of Routing Maps/Rules have you developed to satisfy complex approval scenarios
- d) Using proposal development for non-standard submissions (USAID, Clinical Trials, etc.)
- e) Resubmission process – continuing the discussion thread started via email some months back
- f) User Satisfaction Survey: Tools Institutions use to gauge the end user's experience with using their adopted eRA solution and/or support received.
- g) Budget Salary – Sync to salary cost limit function.
- h) Miscellaneous: Any other creative system uses or challenges that participants would like to share

### **3) Functionality coming up in Coeus 4.5 / Kuali Coeus 3.1**

- a) Enhancements included in upcoming releases, how they will impact current functionality, and intended enhancement usage

### **4) Future Procedures and Operations of Coeus/KC Module**

- a) How will the business of the further development of the modules will get done

### **5) The Future of Coeus/KC Modules**

- a) Brainstorming what functionality or improvements that we'd like to see (please don't limit this to the proposal development module-it is okay to think globally!)

\*Lunch will be used as a networking opportunity and allow for module cross-pollination.

# Subcommittee Agendas

## AWARD SUBCOMMITTEE - AGENDA

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### 1) Welcome & Overview:

- a) Structure and history of the Coeus Post-Award Subcommittee and the Kualu Coeus Awards SME group.
- b) Participation - How to participate and why it's a good idea!

### 2) Open Forum Discussion: Creative Solutions using Coeus/ KC

Be prepared with your own questions and stories!

- a) Award Hierarchy – “To Use or Not to Use”, that is the question. Other questions include when and how.
- b) Award Budget – Ready for Prime Time? Discuss the pros and cons of current functionality and how it may fit your institution's needs.
- c) Permissions and Workflow – Does your institution do something interesting with system Roles or Approval maps that might be interesting for others to hear? Do you have a unique problem you need help thinking through?
- d) Parameters and Table set-up during Implementation – Tell your ‘war stories’ and save someone some heartache...
- e) Custom Data solutions – Does your institution have a great Custom Data field to solve a problem our application doesn't handle ‘out-of-the-box?’
- f) Periodic Reporting - How does your institution use Coeus/KC data for periodic reports of award? What obstacles need to be overcome?

### 3) Work In Progress: Enhancements coming in Coeus 4.5/Kuali Coeus 3.1

- a) What changes are coming in the next release and how were they designed to be used?
- b) Think ahead about how your institution may use the newest bells and whistles.

### 4) Looking Ahead with Great Ideas:

- a) What do users want for the future of KC? - This is your chance to brainstorm and gain support for all your brilliant ideas for future KC enhancements!

### 5) Future Development Procedures: How will future development be completed?

- a) How can we get our specifications written and thoroughly reviewed with greatest efficiency?
- b) Is there a good way to share the work?
- c) Quality Assurance – invest the time to test!

### 6) Calling all Hands! – There is plenty of specification work and testing to be done if anyone can lend a hand the rest of the day. Bring a laptop with a good battery, stick around and participate. You just might learn something!

## TECHNICAL SUBCOMMITTEE - AGENDA

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- 1) Welcome and Introductions
- 2) KC Applications Administrator Functionality

## MEMBERSHIP & OPERATIONS SUBCOMMITTEE - AGENDA

---

- 1) Welcome and Overview
- 2) Overview of the Structure & History of the Members/Op Coeus Sub-Committee
- 3) At what meetings should we have a booth?
  - a) NCURA?
  - b) SRA?
  - c) IRB PRIM&R?
  - d) IACUC PRIM&R?
  - e) Others?
- 4) As we continue to integrate the two organizations, email lists/wikis need to begin merging for our subcommittees, meaning phasing out the @mit.edu email lists.
- 5) We also would like your group to take on the responsibility for updating/maintaining information about KC Implementations using this spreadsheet on our Google Docs site:  
<https://spreadsheets.google.com/a/kuali.org/ccc?key=0ApFyDYD0MtSkdENLNkhSUU9CWXJHdlqNmsxNIE1Z2c&hl=en#gid=0>
- 6) KC Web Pages and content upkeep
- 7) Other Business

## COMPLIANCE SUBCOMMITTEE - AGENDA

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- 1) Welcome & Introductions
- 2) Overview of the structure and history of KCC Compliance Subcommittees
- 3) Current and Future Procedures and Operations of Coeus/KC Modules
- 4) Open Forum Discussion
  - a) Creative Solutions
  - b) Is Your Institution Using Coeus/KC Compliance Modules
- 5) Current and Future Procedures and Operations of Coeus/KC Modules
- 6) The Future of Coeus/KC Compliance Modules
- 7) KCC Compliance Modules Breakout Meetings
  - a) COI
  - b) IACUC
  - c) IRB

# Conference Attendees

## Boston University

Janet O'Brien  
Kathleen Foster  
Mohammed Kousheh

## Brown University

Andy Krajewski  
David Harrison  
Emily Derby  
Jennifer Quinn  
Katarzyna Szulc

## Coeus Consortium Staff

Rosemary Hanlon  
Sabari Nair

## Colorado State University

Jon Peterson

## Cornell University

Joseph Abraham  
Dan Dwyer  
Kenton Hensley  
Christopher Lyons

## Database Development

Edward Castagna

## Drexel University

Alla Goykhman  
Claire King  
Mike Edwards

## Education Development Center, Inc.

Carrie Traub

## George Mason University

Carol-Ann Courtney  
Karen Cohn  
Lindsay Wescott

## Indiana University

Carey Conover  
Christine Ray  
James Thomas  
Jim Becker  
Karen Shrode  
Lora O'Connor  
Ryan Merckle  
Sara Brand  
Shawn Axe  
Stephanie Roberts  
Swetha Enaganti  
Terrence Durkin

Tracey Levy

## Iowa State University

Don Paulsen  
Rochelle Athey  
Weiwen Sung

## Jenistics, LLC

Jen Flach

## Johns Hopkins University

Alexander Galea  
Christine Johnson  
Ellen Morthole  
Katherine Newkirk  
Kelly Welsh  
Linda Provenza  
Marge Trefill  
Matthew Miller  
Rhanota Edwards  
Rita Rawlinson  
Robert Taylor  
Ronald Schultz  
Ruth Hurd  
Tiffany Johnson  
Timothy Schleicher  
Yingdong Yuan

## Kent State University

Amanda Lindsay  
Diana Skok  
Donna Johnson

## Kuali Foundation

Jennifer Foutty

## Marshfield Clinic Research Foundation

Valerie McManus

## Massachusetts institute of Technology

Carol Wood  
Colleen Leslie  
Eleanor Shavell  
Jennifer Lu  
Pedro Viejo  
Steve Dowdy  
Wendy Barrigar  
Julia Owens

## Medical University of South Carolina

Carol Boyer  
Robbie Lee

## Michigan State University

Dan Evon  
Doreen Woodward  
Katie Cook  
Lisa Oliva  
Peter Asquith  
Renee Dolan  
Robert Rock  
Scott Cooley

## Mississippi State University

Richard Swann  
Sandy Williamson

## Northeastern University

Deborah Grupp-Patruz  
Kevin Coombs  
Larry Barnett  
Mark Staples

## Princeton University

Jeffrey Friedland  
Kyle Burkhardt  
Yuri Smolyansky

## Purdue University

Amanda Hamaker  
Amy Prior  
Chris Tompkins  
Jessica Lawrence  
Vanda Paladino

## Research Foundation of SUNY

David Usher  
Don Lavelle  
Ivar Strand  
Lisa Gilroy  
Lydia Chabza  
Mark Abbey  
Tam Sayer  
Thomas Wendt

# Conference Attendees

## Rochester Institute of Technology

Anthony Capobianco  
Nicholas Rogers

## St. Vincent Indianapolis Hospital

Edna Mae Rewers  
Marissa Camarillo

## Stevens Institute of Technology

Larrison Jackson

## Texas Tech University

Arzu Ozbek Akay  
Jeff Hagins  
Kathleen Harris

## The Commonwealth Medical College

Sandra Mancuso

## The Jackson Laboratory

Kristin Blanchette  
Sven Davisson  
Virginia Shubert-Seavey

## Tulane University

Jamie Causey  
Thomas Cheek

## UMDNJ

Christopher Stastny  
Maria Constanten

## Uniformed Services

## University of Health Sciences

Sharde' Randall  
Yvette Prince

## University of Arizona

Dimuthu Tilakaratne  
Jessica Peck

Lori Ann Schultz  
Paul Sandoval  
Sean Armstrong  
Susan Mundt

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Kathleen Nolan  
Keith Young  
Suzanne Burton

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Eric Taggart  
Nancy Lewis

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Andrea Rollins  
Emily Deere  
Isabella Parkinson  
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Kevin Chou  
Linda Collins  
Mary Brown  
Patti Williams  
Robert Dias

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Christine Jones  
Steven Manning

## University of Iowa

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Jennifer Lassner  
Jose Jimenez  
Twila Fisher Reighley

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Segers  
Dennis Paffrath

Douglas Bowser  
Kiscia Cannon  
Song Yu  
Susan Hobbs

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Denise Clark  
Jason Strahan  
Laura Salers  
Sally Egloff  
Vonnie Perkins  
Zach Friedman

## University of Texas MD Anderson Cancer Center

Michael Lemonine  
Susan Mactyre

## University of Virginia

Cathy McDaniel  
Lindsay Kidd  
Stewart Craig

## Upstate Medical University

Jason Wagner

## Vanderbilt University

Peggy Pobst

## Wayne State University

John McBride  
Patty Yuhas Kieleszewski  
Rajeev Sadasivan  
Timothy Foley

## Weill Cornell Medical College

Bess Jensen  
Pralhad Raju

## Yale University

Adam Schechter  
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[State Theatre](#) – 1 block  
[O. Henry Home and Museum](#) – 3 blocks  
[Austin Children’s Museum](#) – 7 blocks  
[Austin Music Hall](#) – 1 mile  
[Bob Bullock Texas State History Museum](#) – 1 mile  
[Lyndon Baines Johnson Presidential Library and Museum](#) – 2.5 miles  
[Austin Museum of Art at Laguna Gloria](#) – 5.5 miles

#### Attractions

[Governor’s Mansion](#) – 5 blocks  
[Texas State Capitol](#) – 6 blocks  
[Lady Bird Johnson Wildflower Center](#) – 20 minutes

#### Shopping

[The Arboretum](#) (upscale shops and boutiques) – 15 minutes

#### Outdoor Recreation

[Town Lake Hike and Bike Trail](#) – 7 blocks  
[Congress Avenue Bridge](#) (home of the Mexican bats) – 7 blocks  
[Barton Springs](#) (natural spring pool and park) – 2 miles  
[Zilker Park](#) – 2.5 miles  
[Lake Travis](#) – 12 miles  
[Mt Bonnell](#) – 15 minutes

#### Sports

[Erwin Arena](#), home of UT Longhorn Basketball – 1.5 miles  
[Texas Memorial Stadium](#), home of UT Longhorn football – 1.5 miles  
[Disch Falk Field](#), home of UT Longhorn baseball – 3 miles  
[Dell Diamond](#), home of the Round Rock Express Minor League Baseball Team – 22 miles

#### Universities

[University of Texas](#) – 1 mile  
[Concordia University](#) – 2 miles  
[St. Edwards University](#) – 3 miles

#### Dining & Entertainment

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[6th Street Entertainment District](#) (restaurants & clubs) – 1 block  
[4th Street Warehouse District](#) (upscale restaurants & clubs) – 4 blocks  
Station Square – 1 mile  
[Eddie V’s Edgewater Grill](#) (steak, seafood and Jazz music) – 4 blocks  
[Fleming’s Steakhouse](#) (fine dining) – 6 blocks  
[Hut’s](#) (hamburgers and shakes) – 1 mile  
[Hula Hut](#) (Tex Mex with Asian Pacific flare) – 3 miles

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## Coeus - Kuali Coeus - Electronic Research Administration

Look to Polus Solutions for your Coeus or Kuali Coeus implementation and ongoing support. Our resources have been an integral part of the Coeus design and development process throughout the Coeus application's lifecycle and have played a leading role in the support of the Coeus Consortium. We have also been involved with the functional development of the Kuali Coeus application and our developers have been part of the Kuali Coeus development team. Whether you continue to use Coeus or decide to implement Kuali Coeus we can provide a full range of services and support.

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