



Research Administration Program  
[erap.ucsd.edu](http://erap.ucsd.edu)

UC San Diego

## ABA Fiscal Contacts Update

February 21, 2012

# Meeting Agenda

- eRAP Refresher
- Huron Report & Scope of eRAP
- Staffing & resource requirements
- Project Team Roles & Responsibilities
- Next steps – interim OCGA improvement to proposal Log and proposal submittal
- Discussion

# eRAP

## Electronic Research Administration Program

### What is eRAP?

- Campus-wide initiative to implement systems and tools that support improved management by departmental personnel and central offices of sponsored research lifecycle!

### Goal

- Continually transform research administration to streamline business processes that minimize the time researchers and research support staff must spend on administrative activities

# Why eRAP?

- UC San Diego consistently ranked among top 10 US research universities
  - ▣ Requires significant administrative effort by departments and central offices
  - ▣ Uses sub-optimal departmental facing research administrative systems & processes
  - ▣ UCSD is behind the times – sponsors and cohorts have made advancements in automation & systems years ago
- Endorsed Strategy...
  - ▣ Proceed to re-engineer the tools & processes that manage the processes that fulfill the lifecycle of our substantial research portfolio

# e-Rap Near Term Objectives – Proposal Development solutions

- Develop and deliver enterprise departmental systems that:
  - provide functionality for department and PI facing proposal preparation & submission processes
    - Workflow, routing and approvals
    - Transparent visibility to status, to-do's, and processing time
  - improve and standardize processes and systems for departmental ease and usability
  - integrate with central office proposal and award administration requirements
  - integrate processes with accurate reporting for department research administrative requirements

# Coordinating and Contributing Staff Resources

- Initial Phase – Coeus Proposal Development and Reporting
  - ▣ Project Management
    - Project Manager & Business Analyst
    - Training & Communication Manager
    - Research Administration Portal coordinator
  - ▣ Coordination with all campus central pre-award offices
    - OCGA, HS SPPO, SIO OCGA, OCTA, and OPAFS
    - AA, HS and SIO departmental experts
  - ▣ Technical Staff
    - Coeus Developers
    - Research Data Management & Reporting Developers
    - Shared resources for ACT operational infrastructure

# PD Project Phases

- ▣ Timeline: July 2011 – June 2013
  - Requirements Analysis and Process Re-engineering
  - System Implementation and Testing
  - Pilot
  - Training
  - Roll-out
  - Steady-state (care and feeding)
  - Next Phases

# Scale of Proposal Development & Reporting Rollout

- **Audience:**
  - 6 Central Offices – all staff
  - 137 departments
- **Estimated target population affected:**
  - Pilot 60-80 Departmental Staff and Central Office users
  - Initial campus-wide rollout: 800
  - Entire population over 2 years / system lifespan: 1500- 2000
- **Initial campus-wide training phase:**
  - 600 trainees, some will attend multiple modules for multiple functional responsibilities
  - 90 half day sessions with 12- 15 participants each
  - 6 half day sessions per week delivered by 2 training teams over 15 weeks
  - Training teams: Training Manager, Customer Care Manager, Central Office SMEs + 1 admin
- **“Steady State” training**
  - Provide ongoing training to new employees due to staff turnover and evolving business processes requirements in 137 departments & 6 central offices. Topics include:
    - Intro to Proposal Development (Coeus Lite)
    - Budget preparation
    - Advanced Coeus (Premium)
    - Reporting: Award & Proposal Data



# Next Steps - PD

## □ To-Do's for PD Project Team:

- 👍 Complete PD functional requirements
- 👍 Review functional requirements with UCSD stakeholders to get input and finalize/approve
  - 👍 Engage key business officers for workflow and approval models
  - 👍 Engage financial administrators to develop proposal development budget templates

# Next Steps - Reporting

- 👍 Assemble Reporting Team and begin meeting (in progress)
- 👍 Identify current challenges with:
  - 👍 Data warehouse: data structure, availability, access, usability, etc.
  - 👍 Reporting tools: Querylink, Cognos, homegrown, etc.
  - 👍 User training gap analysis
- 👍 Identify reporting needs
  - 👍 Develop project plan to improve C&G reporting capabilities

# OCGA Commitment to Customer Service

- Customer service surveys indicate the campus research community seek confirmation of the following from OCGA:
  - ▣ Who will be processing a specific proposal in OCGA?
  - ▣ Did OCGA receive my proposal package?
  - ▣ Is additional information required so the OCGA analysts can effectively review/submit proposals?
  - ▣ Better communication between department/ORU staff and OCGA

# Proposal Submission Process Email Address

- [Proposals-ocga@ucsd.edu](mailto:Proposals-ocga@ucsd.edu)
- Fulfills 4 important objectives
  - Logs proposal within OCGA for tracking
  - Assigns to OCGA analyst
  - Communicates status to customer
  - Records existence of proposal **real time** in *Coeus*
    - Once proposal is logged in “Proposal Log”, status is posted to data warehouse
  - Provides a **single email address** for all proposal related communication and documentation

# Proposal Log Web Service Changes

**Related Links**  
[Reports](#)  
[Transactions](#)  
[Tools](#)  
[Queries](#)  
[Unapproved Docs](#)  
[Mail List](#)  
[Link Family](#)

**1**

Helpful  
Tips

**Note: Instead of using the proposal log web service, please contact the appropriate central office for the following types of situations.**

- [Anticipated Award type is Sponsor Initiated Clinical Trials - Contact OCTA](#)
- [PI is not established in PPS - Contact appropriate pre-award office](#)
- [Proposing to a new sponsoring agency - Contact appropriate pre-award](#)

Central Office	Phone Number
OCGA	(858) 534-3330
OCTA	(858) 534-xxxx
HS SPPO	(858) 822-4109
SIO	(858) 534-4570

Enter PI name for your new UCSD proposal number

**Principal Investigator:**

Full name(Last, First) [Didn't find your PI?](#)

Additional instructions to guide the user of circumstances when proposal log web services does not apply.

Pre-award contacts are displayed on the first page of the web service to ensure excellent customer service

# Proposal Log Web Service Changes

**PI Exception Required:**

**Proposal Type:** \*

**Anticipated Type of Award:** \*

**Title:**

**Sponsor:** \*

**Prime Sponsor:**

Enter prime sponsor only if this is a subaward to UCSD

The field titled 'Proposal Category' was replaced with 'Anticipated Type of Award'

Additional options have been added to the 'Anticipated Type of Award' drop down options

# Proposal Log Web Services Changes

**i** **Sponsor Deadline:**

Internal Proposal. Check here if the award has been received.

No Sponsor Deadline. Check here if sponsor has not set a proposal deadline date.

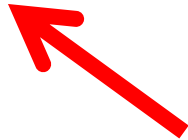
Sponsor has Deadline. Enter date below.

**i** **Sponsor Deadline Date:**  (mm/dd/yyyy)

**i** **Copy and Mail index:** \*

**i** **Assigned Office:** \*

**'Sponsor Deadline'  
Options have been  
expanded**



*'Assigned Office' Field was added to facilitate the new OCGA Proposal Process.*

# Proposal Submission Process Correspondence

- Two emails are associated with the new process
  - ▣ Email 1 = confirms that OCGA has received and assigned proposal to OCGA analyst
  - ▣ Email 2 = confirms sufficient supporting documentation is received and the OCGA Analyst is reviewing proposal
  
- Information included in emails
  - ▣ UCSD Proposal Number
  - ▣ PI Name
  - ▣ Department Contact
  - ▣ Proposal Sponsor
  - ▣ OCGA assigned Analyst name, email, and phone number





Questions