Overview for ABA/ ORUBA
March 14, 2013

Linda Collins
Jason DeFay
Nicole Joyce
Isabella Bryant-Parkinson
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!

Goals
- Continually transform research administration
- Streamline and standardize business processes
- Minimize time researchers and research support staff spend on administrative activities

Why?
- UCSD in top 10 for research
- Requires significant administrative effort by departments and central offices
- Current sub-optimal departmental facing research administrative tools
- Behind the times – many advancements in automation & systems years ago
### Executive Committee (AVC’s, Directors, Faculty)

- **VC Areas**
  - Scripps Institution of Oceanography
  - Health Sciences Dean’s Office
  - Research Affairs, Chair
  - Academic Affairs EVC Office
- **Faculty Representatives**
  - SIO
  - Health Sciences
  - Academic Affairs
- **Stakeholders**
  - Audit & Management Advisory Services
  - Business & Financial Services
  - Administrative Computing & Telecommunications

### Steering Team

- **Co-Chairs**
  - Research Affairs - Jason DeFay
  - OCGA – Linda Collins
- **Central Offices**
  - HSSPPO – Maureen O’Connor
  - SIO OCGA – Nancy Wilson
  - OPAFS – Mark Cooper
  - Procurement & Contracts – Ted Johnson
  - Administrative Computing - Kevin Chou
- **Departments/ORUs**
  - SIO – Anne Cressey
  - Health Sciences – Patty Camacho
  - Academic Affairs – Alma Palazzolo
- **Compliance Offices**
  - Animal Care Program – Phil Richter
  - EH&S - Gary MacPherson
  - HRPP - Michael Caligiuri
  - COI – Valerie Dixon
  - IACUC Office – Marilyn Torchia
  - TTO – Jane Moores
- **eRAP**
  - Beatrice Dormoy – eRAP Project Manager
UCSD Contract & Grant Proposals
Fiscal Years 2003 - 2012

* FY 09 and 10 reflect proposal increase due to stimulus opportunities
<table>
<thead>
<tr>
<th>Metric</th>
<th>2002</th>
<th>2012</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Proposals Transactions</td>
<td>3187</td>
<td>4281</td>
<td>+34%</td>
</tr>
<tr>
<td>$$ Awarded</td>
<td>$550M</td>
<td>$1.01B</td>
<td>+84%</td>
</tr>
<tr>
<td>Award Transactions</td>
<td>3908</td>
<td>6471</td>
<td>+66%</td>
</tr>
<tr>
<td># of Individual PI’s</td>
<td>1075</td>
<td>1460</td>
<td>+36%</td>
</tr>
<tr>
<td>Departments and ORU’s</td>
<td>105</td>
<td>111</td>
<td>+6%</td>
</tr>
<tr>
<td>Sponsors</td>
<td>660</td>
<td>996</td>
<td>+51%</td>
</tr>
<tr>
<td>Staff involved in sponsored research administrative duties</td>
<td></td>
<td>500</td>
<td></td>
</tr>
</tbody>
</table>
Current Projects

• **ePD** - Coeus Proposal Development module for entire campus
  - Phase 1 Basic
  - Phase 2 Advanced

• **eMTA** - Click Commerce electronic material transfer agreement request system

• **Reporting** - Research Data Warehouse with enhanced reporting capabilities (at risk of completion)
ePD (Electronic Proposal Development)

- Web based system for departments and proposal creators to...
  - create, upload, route, approve, submit and store sponsored research proposals
  - improves, automates, streamlines and standardizes business processes for departments and central offices
  - Integrate with Coeus enterprise databases, data warehouse and sub-systems
...who else is using it?

...just to name a few

- Massachusetts Institute of Technology
- Johns Hopkins
- Brown
- University of Maryland Baltimore County
- Princeton University
- Vanderbilt University
- Indiana University
- University of Arizona
- West Virginia University
- MD Anderson Cancer Center
ePD Features

- **Streamline** & automate PD processes by replacing current manual & paper-based tasks
- **Provide** central repository for proposal documents
- **Create** online collaboration interface for various entities involved in PD & pre-award processing
- **Eliminate** or minimize data entry duplication & ensure data validation
- **Speed up** routing & approval
- **Allow** status tracking & improve proposal workload visibility
- **Reduce** reliance on shadow systems
- Catalyst for **self-directed learning** through intelligent questions and self-help
ePD Rollout Plan

• Planned progressive rollout to:
  • 130 campus research departments/divisions/ORUs
  • starting Fall 2013 – Spring 2014

• The team a limited term cross-functional team:
  • project manager
  • training manager
  • operations manager
  • 2 developers
  • 3 sponsored projects central offices (project assignments)
  • 4 pilot testing departments (28 departmental/ORU staff)
A Quick Tour ...
Where are we now with ePD?

• Hardware infrastructure expanded
• Production environment software upgraded
• Pilot testing in progress:
  o 30 Pilot testers testing hundreds of proposal scenarios
  o Implementing 1\textsuperscript{st} round of Pilot feedback
• Deployment Planning: Evaluating scope of ePD functions for Phase 1
• Touch points / Data integration analysis in progress
  o Identifying downstream data/system dependencies (IFIS, PPS, etc.)
  o Mapping new business processes
  o Prep for associated QA
• Developing communication plan for faculty and staff
• Developing training and customer support strategies
ePD Pilot Testing Overview

4 Pilot Departments (14 testers)
  - MPL, Neurosciences, SDSC and Physics

3 Central Offices (13 testers)
  - OCGA, SIO OCGA & HSSPPO

Pilot Testing underway
  - Orientation & training complete
  - Reconfiguring system based on feedback
  - Repeat tests and document results
  - Scheduled to proceed through May 2013

Over 7,000 unique proposal scenarios identified (proposal type, sponsor type, award type, etc.)
  - Testing dozens of proposal scenarios

Feedback from Pilot Testers
ePD Rollout Timeline

Start Collecting Requirements

Analyze & Apply Requirement to ePD Lite 4.3 System

Pilot Testing Preparation & Tester Orientation

Beta Pilot Testing (Department/Central Office Facing)

Phase 1 Live Rollout to Pilot Departments

Tentative Phase 2 Advanced ePD Functionality & Requirements Analysis for Reporting

We Are Here

Initial ePD Lite 4.3 System Configuration

Upgrade ePD Lite System from 4.3 to 4.5.1 (plus additional system configuration)

Alpha Pilot Testing (Department/Central Office Facing)

Quality Assurance (QA) Testing

Phase 1 Progressive Rollout to Campus Basic ePD Functionality

Spring 2014
Impact/Considerations

- **Change management** - adoption of new process, system and business rules will be challenging
- **New functionalities** – support new levels of accountability/compliance but may increase effort required
- **Training** – UCSD research community is large & training needs are complex
- **Complexity** - project has limited resources and there is a high demand for efficiency and success
- **Phased feature roll out**
  - Basic ePD
  - Advanced ePD
Thank You!

Visit erap.ucsd.edu