Coffee with ORPA:
Coeus Replacement (Core) Project Update

January 23, 2020

Presenters:
Kyle Burkhardt
Paula Looney
Francine Taylor
Maureen Thompson-Siegel
Agenda

- Implementation Team Update
- Steering Committee
- Community Engagement
- Project Champions
- Project Update
- Demo
- Next Steps
- Quiz
- eRIA: IRB Upgrade Summary
ERA
Princeton Research
Electronic Research Administration
It’s a new era!
Implementation Team Update
Implementation Project Team

ORPA

› Elizabeth, Kyle, Paula, Maureen, Francine

PATCO

› Theresa Hvisdock, Project Manager
› Martin Harrison, Project Consultant

OIT

› Donna Lawrence, Director, PAC, OIT
› Ian Finch, Manager, PAC, OIT

Huron Partners

› Tony Haber, Project Executive
› Tim Schleicher, Delivery Director, Project Manager, Subject Matter Expert
› Marlo Cordio, Business Analyst
Steering Committee
Steering Committee

- The Steering Committee is comprised of key University stakeholders who represent the interests and needs of our campus community on this project.

- The Committee will provide assistance with the evaluation and resolution of major project issues and risks as well as provide feedback on project milestones, deliverables, policy recommendations and decisions.

- The Steering Committee kick-off meeting was held on January 7th.
Steering Committee

- The use of modern technology to bring greater productivity and lower administrative burden

- The utilization of out of the box functionality to minimize customizations, and the alignment our business processes to accommodate the new system

- Help the business of research become more data driven by providing the ability to deliver proposal and non-funded agreement analytics
Steering Committee Members

- Elizabeth Adams – ORPA
- Todd Bristol – WWS
- Albana Cejne – OAC
- Steven Gill – OCAP
- Janet Gruschow – CHM
- Martin Harrison – PATCO
- Donna Lawrence – PAC
- Stuart Leland – RIA
- Glynis Sherard – SRA
- Annette Tate – DFR
- Tim Tayler – PNI
- Roger Weisenberg – F&T
Community Engagement
Project Champions Charter

Princeton ERA’s Project Champions come from across the University’s research enterprise. They represent the diverse views of those who will use, benefit from and be impacted by Princeton’s new research administration system.

Project Champions are charged with providing thoughtful and constructive feedback to the Implementation team during the implementation and launch of Princeton ERA.

They help the Implementation Team to make decisions that reflect and respond to the interests of the entire research community by participating in activities to evaluate system and business-process changes during implementation.

They also share information about the project and new system within their own spheres of influence and advocate for the changes Princeton ERA brings.
Project Champions

› Raphael Aryeetey – PRISM
› Vesna Bacic – MOL
› Mike Checkovage – CHM
› Barbara Chinery – LSI
› Mona Hall – ORPA Shared Svces.
› Zack Kaado – PEI
› Courtney Kohut – ORPA
› Sarah McGovern – SML
› Robin Pispecky – OPR
› Stephanie Rumphrey – PHY

Subject Matter Experts

› Drew Allen – DDSSI
› Kara Dolinski – LSI
Importance of Everyone’s Voice

➢ The Princeton ERA team has worked hard over the last year to engage YOU - our community.

➢ We are fortunate to have partners that are collaborative and supportive.

➢ The Huron Research Suite was selected based on YOUR feedback!

➢ We value YOUR opinion and plan to keep the lines of communication open and interactive.
Continuing Feedback

- Surveys
- Continued face to face updates
- Blog posts
- ORPANews updates
- New Website
Princeton ERA Website
The Coeus Replacement Project and Princeton ERA

Research at Princeton requires modern, efficient administration systems. After two decades of use, Princeton’s Coeus grants database has reached end-of-life. We are replacing the Coeus platform with Princeton ERA, a SaaS (Software as a Service) cloud-based electronic research administration system. Learn more about our implementation.

Princeton ERA will:

- reduce administrative burden on faculty and staff;
- increase intelligence to support improved decision-making; and
- ensure Princeton remains compliant in all its research activities.
Implementation FAQs

- What is the Core Project?
- What is Princeton ERA?
- Why are we replacing Coeus?
- How did we decide on the technology platform the new Princeton ERA?
- What is Huron Research Suite?
- How will Princeton ERA integrate with other systems?
- What will we be able to do using Princeton ERA?
- What are some of the benefits of Princeton ERA?
- What criteria did we use to select the technology platform for Princeton ERA?
- Who provides project oversight and governance?
- What is the project timeline?

News

Welcome to the Princeton ERA website
Saturday, Jan 10, 2020

We have launched this new website to provide our community with one-stop access to all things ERA. Please bookmark this site to stay informed on...

READ MORE

Blog Post - 1-10-2020: Coeus Replacement Project - Meet the Steering Committee
Friday, Jan 10, 2020

As Barbara Walters said, “This is 2020.” Moving into 2020 means we will be deploying our new system this year! As we work toward the go-live...

READ MORE

Blog Post - 12-13-2019: Coeus Replacement Project - Champions
Friday, Dec 13, 2019

Champions - what does this have to do with the Coeus replacement project? Well, Huron defines Project Champions as key influencers in...

READ MORE

Blog Post - 11-13-2019: Coeus Replacement Project - Onboarding
Wednesday, Nov 13, 2019

Did you miss us? While you were getting the academic year up and running, the Core Team has been very busy onboarding with Huron.

READ MORE
Implementation

Project Overview

After two decades of use, Princeton’s Coeus grants database has reached end-of-life. We are replacing Coeus with Princeton ERA, a SaaS software as a Service cloud-based electronic research administration system. The Coeus Replacement (Core) Project is a SAGIT-funded (Strategic Advisory Group on IT) project delivering on specific recommendations from the Task Force on Administrative Workload in Research.

The Coeus Replacement Project reflects extensive input from across the Princeton research enterprise: the 15-month process to select Huron ResearchSuite as the new platform included 31 focus groups with community members, three onsite demos by vendors, sandboxing and user experience testing with two vendors, and countless community-stakeholder meetings.

Project Guiding Principles and Objectives

- Use out-of-the-box functionality
- Align business processes with the new system
- Minimize customizations
- Undertake minimal data conversion
- Include new budgeting tools
- Include non-funded agreement management
- Deliver proposal and non-funded agreement analytics

Project Governance

The Core Project has a Project Implementation Team made up of functional and technical members from ORPA and CIT.

The Core Project has a Steering Committee that provides strategic input and assistance to the Core Project Team, evaluating and resolving major project issues, risks, and decisions, as well as providing feedback on project milestones, deliverables, and policy recommendations.

The Core Project also has Project Champions who represent the interests of the research-administration community who will be heavy users of the system. Project Champions will help the Core Project Team to develop a robust system technology platform and business processes to modernize proposal preparation and non-funded agreement processes in an effort to ease administrative burden.

What’s Happening Now

We are currently in the behind-the-scenes implementation process of the project, with plans to launch Princeton ERA late this summer. We will move into systems testing in the spring and to begin user training in early summer. This training will be a combination of one-on-one, group sessions, and self-service training options for the community.
Project Team

Implementation Team

Elizabeth Adams
Project Sponsor
Director, Office of Research and Project Administration

Kate Burkhardt
Technical Team Lead
Senior DUA Manager, Office of Research and Project Administration

Maria Garcia
Project Business Analyst

Ian Pitch
Manager, Application Integration, Software and Application Services, Office of Information Technology

Theresa Heidick
Project Manager

Donna Lawrence
Change Package Architect and Manager, Office of Information Technology

Paula Looney
Functional Team Lead

Francine Taylor
Functional Team Lead

Maureen Thompson-Stiegel
Functional Team Lead
Implementation Update
Huron Research Suite System Implementation

Grants
- Proposals

Agreements
- Non-Funded Agreements

Research Profile
- RCR Tracking
This implementation is not...

- A replacement for PS awards + subawards
- A replacement for the OPAR form
- A tool to make coffee, do laundry or make dinner
- A perfect system
Data Conversion

Fully-executed non-funded agreements

RCR tracking

Sponsors

Approval maps

Coeus aggregators
Not converting Coeus proposal data

- Existing proposal data stays in Coeus
- Pending Coeus proposal funded after Huron go-live?
  - Interfaced from Coeus to PS Grants
  - PS Award ID interfaces back to Coeus IP
  - Coeus IP status changes from pending to funded
- Pending Coeus proposal declined after Huron go-live?
  - Marked as declined in Coeus IP
- After ~12 months, all pending Coeus IPs will be marked as declined
Onboarding Completed!

- 9 weeks
- 9/16-11/12
- 20-25 hours/week
- Meetings
- Homework
- Screen-by-screen
- Field-by-field
- Compare our business process to Huron software
What if our Business Process + Huron don’t match?

- Change Business Process?
- Customize the software?
Configuration vs. Customization

**Configuration**
- Using native tools in the system to change its behavior or features

**Customization**
- A modification that requires custom coding
# SaaS vs On-Premise Solutions

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<th>SaaS</th>
<th>On Premise</th>
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<tr>
<td>• Software as a Service</td>
<td>• Software installed and running on servers</td>
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<td>• Vendor hosts the software, all clients use the same software</td>
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<tr>
<td>• Licensed as a subscription</td>
<td>• More control to customize</td>
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<td>• Limited customizations</td>
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Huron SaaS

Software industry, Princeton, Huron all heading toward SaaS

Princeton bought Huron SaaS

Limited customizations

Band together with other Huron schools to improve base product
Customizations

Proposal

Agreements

RCR tracking

Integrations
Huron Integrations

From PeopleSoft HCM

From RCR sources

To/From PeopleSoft Grants

To Information Warehouse

From FCOI

From eRIA IRB
Customization Example: PI Cert.

Out-of-the-box Huron
- Assumes PI develops + submits the proposal in Huron
- Only the lead PI electronically signs the cert
- Only when proposal is submitted into routing
- Option for administrator to develop + submit proposal + upload paper PI cert (no electronic PI cert)

Princeton Customization
- Assumes administrator develops + submits the proposal in Huron
- Administrator asks the PI and co-PIs to sign the PI assurances (all electronic)
- At any time during proposal development
- Option for paper upload
Next Steps
## Implementation Timeline

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<tr>
<th>Task</th>
<th>Fall 2019</th>
<th>Winter 2020</th>
<th>Spring 2020</th>
<th>Summer 2020</th>
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<td>Kickoff</td>
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<td>Go live</td>
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Questions?
Princeton Research

IRB Upgrade Summary
Agenda

• Fewer clicks to navigate the eRIA system  
  • Combined Task Assignment window and the e-forms  
  • Consistent question formatting throughout form  
  • Form help text incorporated into questions  
  • One click feature to create new protocol  
• Home screen reformatted and unneeded links eliminated
Fewer clicks to navigate the eRIA system

Combined Task Assignment window and e-form

Instead of this window...
Combined Task Assignment window and e-form

Users will go directly into the form when clicking on an item in their Things to Do. The functionality that used to reside on the Task Assignment window is now a tab on the form.
Fewer clicks to navigate the eRIA system

Question formatting made consistent throughout form

• Questions with drop down answers have been changed so that the answers appear without a click.

• Before the change, users had to click twice to answer this question, once to view options in the drop down, and once more to choose an answer. (see example below)

  ![Example question](image)

  After the change, the user only has to click once to answer
Fewer clicks to navigate the eRIA system

Form help text incorporated into questions

The Clinical Trials question on the IRB Application is a good example of this...

\[
(5.14) \text{Clinical Trials:}
\]

A research study in which one or more human subjects are prospectively assigned to one or more interventions (which may include placebo or other control) to evaluate the effects of those interventions on health-related biomedical or behavioral outcomes. This definition encompasses phase I trials of FDA regulated drug and biological products, small feasibility studies of FDA-regulated device products, and studies of any intervention not regulated by the FDA, e.g., behavioral interventions. If your study is NIH-funded, the PI is encouraged to contact the NIH Program Official (scientific contact for the study) who will determine whether the study meets NIH’s definition of a clinical trial.

[ ] Yes  [ ] No

Previously, all of the text in italics was contained in a help bubble that could be accessed by hovering over a question mark icon next to the question number. Now the help text is visible, and the user does not have to do anything to view this help text. Changes like these have been made throughout all of the forms.
Fewer clicks to navigate the eRIA system

One click feature to create new protocol

Previously users had to click here... #1
Fewer clicks to navigate the eRIA system

And then users had to choose New or Copy from Existing
Fewer clicks to navigate the eRIA system

Then, users had to provide a title and click Continue.
Fewer clicks to navigate the eRIA system

Then users had to choose a PI and click Continue
Fewer clicks to navigate the eRIA system

Click #4 opened what is called the submission package window, then users had to click once more to actually view the form for the first time.
Fewer clicks to navigate the eRIA system

Users will now see only one screen, and with one click will be able to create a new protocol. When they click Create New Protocol the system will open the combination Task Assignment window / Form window.
Home screen reformatted and unneeded links eliminated
THANK YOU