ResearchUVA Powered by Huron (PBH) Readiness Workshop

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February 24, 2022

ResearchUVA PBH: Readiness Workshop

Outline for Today's Readiness Workshop

1. Project Overview
2. Understanding User Roles and Business Processes
3. Understanding Workflow
4. Training & Learning Opportunities
5. Support Plan

RUVA PBH: Project Overview

ResearchUVA PBH Overview

- What is ResearchUVA Powered by Huron?
- System Advantages
- Project History and Governance
- How will the System Be Used?
- Rollout Timeline

Overview: What is ResearchUVA PBH?

ResearchUVA PBH is an electronic research administration system that contains two modules:

The **Grants Module** to develop, route, and submit proposals, as well as manage awards and award modifications

The **Agreements module** to create, negotiate, and execute funded and non-funded agreements, including outgoing subawards

This new system will replace the legacy ResearchUVA system.

Overview: System Advantages

Collaboration

Cross-Grounds study teams can be created that can work on the proposal together in the system.

Proposal Tools

The system provides tools and data to help study teams create proposals, including multiple iterations of budgets.

Relationship Management

The system creates relationships between proposals, agreements and awards. Tags can be used to track programs tied to institutional investments and thematic areas.

System-to-System

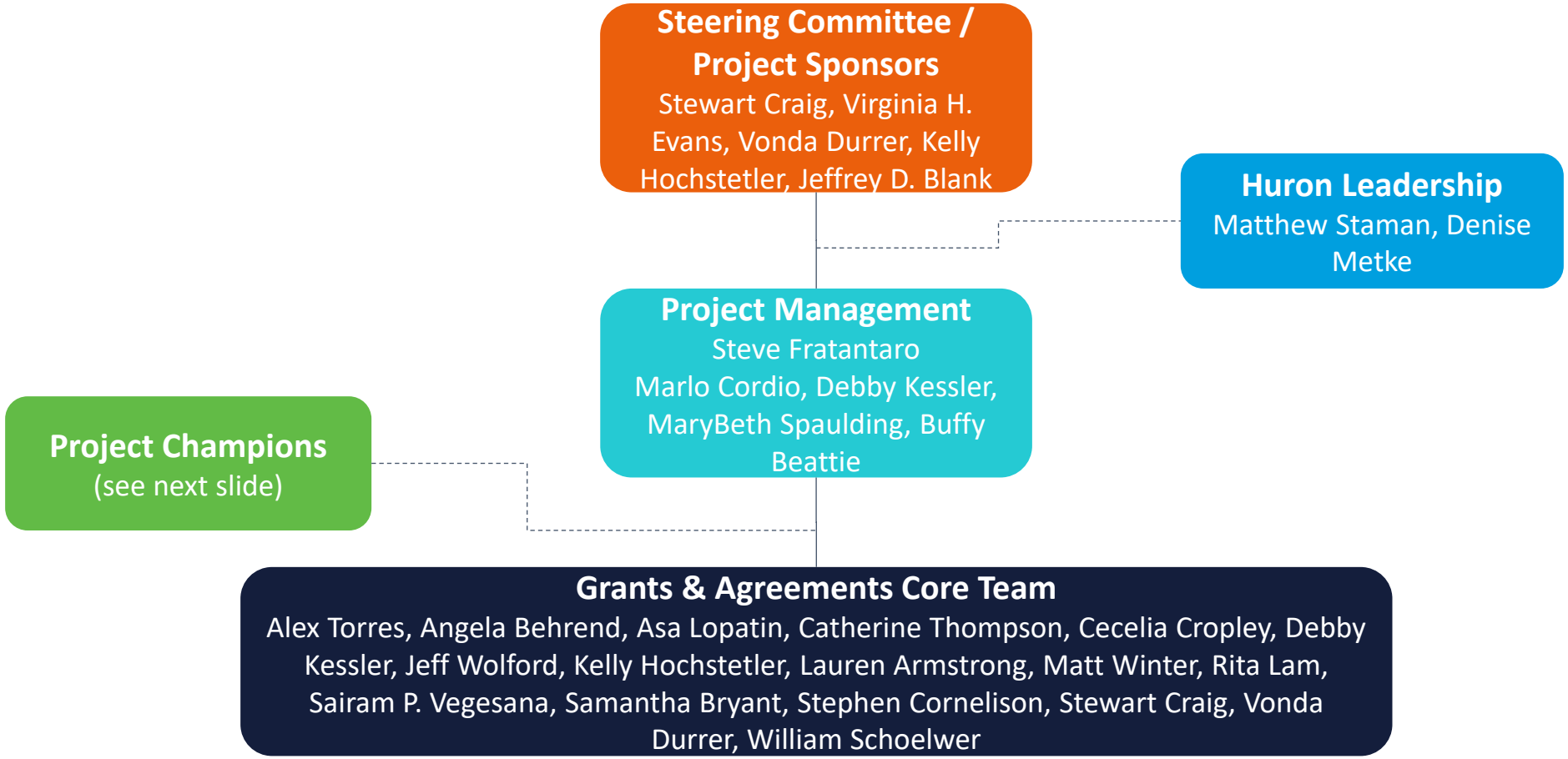
The system submits proposals directly to Grants.gov and ensures it will pass validations.

Data and Reporting

Substantial programmatic and fiscal data will be pulled from the system and placed in a data warehouse for unprecedented reporting opportunities.

Overview: History & Governance

The ResearchUVA PBH project is sponsored by the Office of the Vice President for Research, and UVA stakeholders have been engaged since the project's inception.



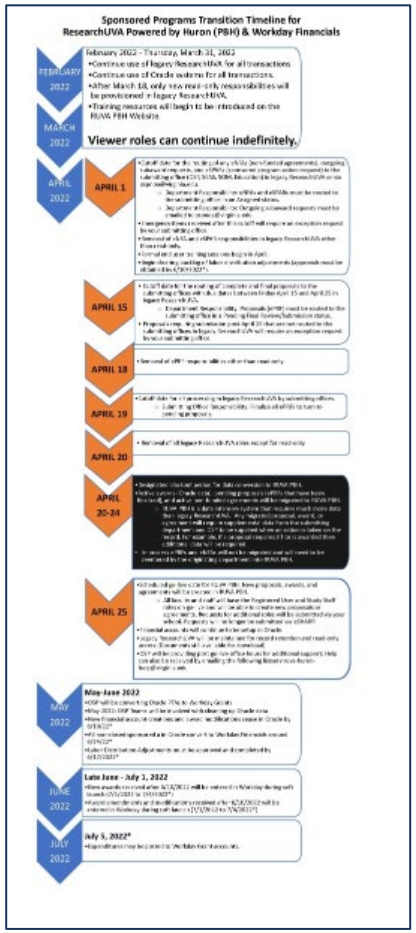
Overview: Project Champions

The project has been guided by a team of Champions representing UVA units:

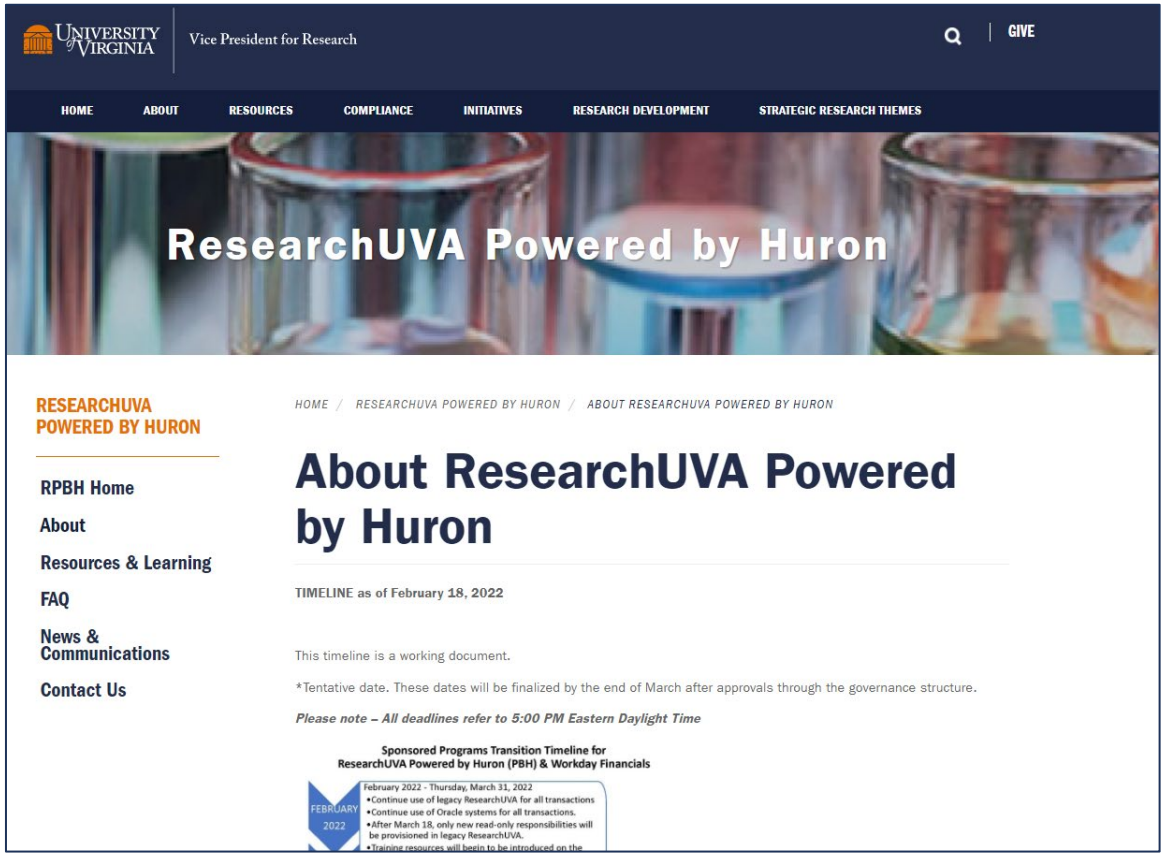
Name	Title	Department
Catherine Bradshaw	Senior Associate Dean for Research & Faculty Development	CU-Human Svcs.
Rob Kelly	Professor	EN-Mat Sci/Engr Dept
Jason Kerrigan	Associate Professor	EN-Mech/Aero Engr Dept
David Driscoll	Associate Professor of Research in Medical Education	MD-DMED Research
Bruce Cahoon	Professor	SOM-WS-Dean of Faculty
Neal Grandy	Director of Arts & Sciences Research Administration	AS-Research Admin
Steve Lichtenstein	Assistant Dean for Research Administration	MD-DMED Research Administration
Lauren Coble	Chief Operating Officer	PV-Biocomplexity Initiative

Overview: Rollout Timeline

The rollout timeline is posted to the ResearchUVA PBH website and is available for review and download on the site



Download on the Website!



Overview: Rollout Timeline

Sponsored Programs Transition Timeline for ResearchUVA Powered by Huron (PBH) & Workday Financials

FEBRUARY 2022

February 2022 - Thursday, March 31, 2022

- Continue use of legacy ResearchUVA for all transactions
- Continue use of Oracle systems for all transactions.
- After March 18, only new read-only responsibilities will be provisioned in legacy ResearchUVA.
- Training resources will begin to be introduced on the RUVA PBH Website.

MARCH 2022

Viewer roles can continue indefinitely.

APRIL 2022

APRIL 1

- Cutoff date for the routing of any eNFAs (non-funded agreements), outgoing subaward requests, and eSPARs (sponsored program action request) to the submitting office (OSP, SEAS, SOM, Education) in legacy ResearchUVA or via ospnoa@virginia.edu.
  - Department Responsibility: eNFAs and eSPARs must be routed to the submitting office in an Assigned status.
  - Department Responsibility: Outgoing subaward requests must be emailed to ospnoa@virginia.edu.
- Emergency items received after this cutoff will require an exception request by your submitting office.
- Removal of eNFA and eSPAR responsibilities in legacy ResearchUVA other than read-only.
- Formal end user training sessions begin in April.
- Begin clearing backlog of labor distribution adjustments (approvals must be obtained by 6/10/2022*).

APRIL 15

- Cutoff date for the routing of complete and final proposals to the submitting offices with due dates between Friday April 15 and April 25 in legacy ResearchUVA.
  - Department Responsibility: Proposals (ePRF) must be routed to the submitting office in a Pending Final Review/Submission status.
- Proposals requiring submission post-April 15 that are not routed to the submitting offices in legacy ResearchUVA will require an exception request by your submitting office.

APRIL 18

- Removal of ePRF responsibilities other than read-only.

APRIL 19

- Cutoff date for all processing in legacy ResearchUVA by submitting offices.
  - Submitting Office Responsibility: Finalize all ePRFs to turn to pending proposals.

APRIL 20

- Removal of all legacy ResearchUVA roles except for read-only.

Overview: Rollout Timeline

APRIL 20-24

- Designated blackout period for data conversion to RUVA PBH.
- Active awards (Oracle data), pending proposals (ePRFs that have been finalized), and active non-funded agreements will be migrated to RUVA PBH.
  - RUVA PBH is a data intensive system that requires much more data than legacy ResearchUVA. Any migrated proposal, award, or agreement will require supplemental data from the submitting department and OSP to be supplied when an action is taken on the record. For example, if a proposal requires JIT or is awarded then additional data will be required.
- In process ePRFs and eNFAs will not be migrated and will need to be reentered by the originating department into RUVA PBH.

APRIL 25

- Scheduled go-live date for RUVA PBH. New proposals, awards, and agreements will be created in RUVA PBH.
  - All faculty and staff will have the Registered User and Study Staff roles on go-live and will be able to create new proposals or agreements. Requests for additional roles will be submitted via your school. Requests will no longer be submitted via eSHARP.
- Financial accounts will continue to be setup in Oracle.
- Legacy ResearchUVA will be maintained for record retention and read-only access (Documents still available for download)
- OSP will be providing post go-live office hours for additional support; Help can also be received by emailing the following listserv ruva-huron-help@virginia.edu

MAY 2022

May-June 2022

- OSP will be converting Oracle PTAs to Workday Grants
- May 2022: OSP Teams will be involved with cleaning up Oracle data
- New financial account creations and award modifications cease in Oracle by 6/10/22*
- All non-closed sponsored a in Oracle convert to Workday Financials around 6/24/22*
- Labor Distribution Adjustments must be approved and completed by 6/17/2022*

JUNE 2022

Late June - July 1, 2022

- New awards received after 6/10/2022 will be entered in Workday during soft launch (7/1/2022 to 7/4/2022*)
- Award amendments and modifications received after 6/10/2022 will be entered in Workday during soft launch (7/1/2022 to 7/4/2022*)

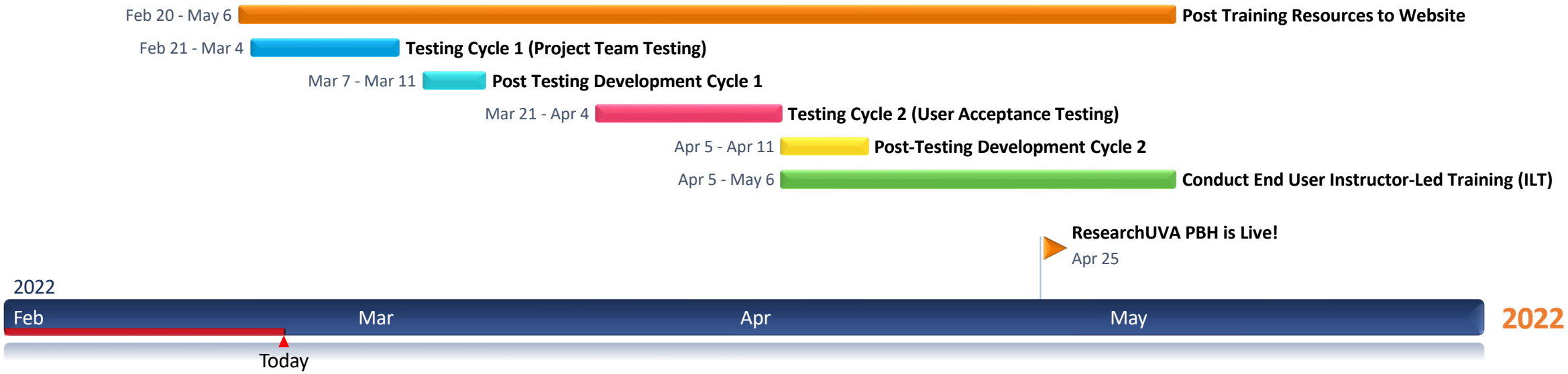
JULY 2022

July 5, 2022*

- Expenditures may be posted to Workday Grant accounts.

Overview: User Testing and Training

The testing phase started this week, and formal training begins in early April



User Roles: Grants & Agreements

System User Roles	Module	System Responsibility
Study Staff / Registered User	Grants, Agreements	Creates and submits funding proposals, award modification requests, and agreements. ***Note: All users in ResearchUVA PBH have these roles.***
Department Reviewer	Grants	Reviews, requests changes to (if necessary), and approves a funding proposal before it is forwarded to the central office for final review and approval. ***Note: Certain department level staff will have this role.***
Specialists	Grants	Manage proposals, awards, and award modifications. ***Note: OSP and submitting schools will have this role.***
Global Grants Viewer	Grants	Provides read access to all Grants records in ResearchUVA PBH.
Global Agreements Viewer	Agreements	Provides read access to all Agreements records in ResearchUVA PBH.

Compliance Review

System Task	Record Type	How Task is Performed
Ancillary Review	All (Funding Proposals, Awards, and Agreements)	Department level or central office staff will manually request an ancillary review. The assigned Ancillary Reviewer will have view only access to the record and permissions to submit their ancillary review. Examples of ancillary review types include collaborating unit verification, licensing and ventures review, and clinical trials office review. ***Note: Records may have more than one ancillary review and ancillary reviews may be completed concurrently.***

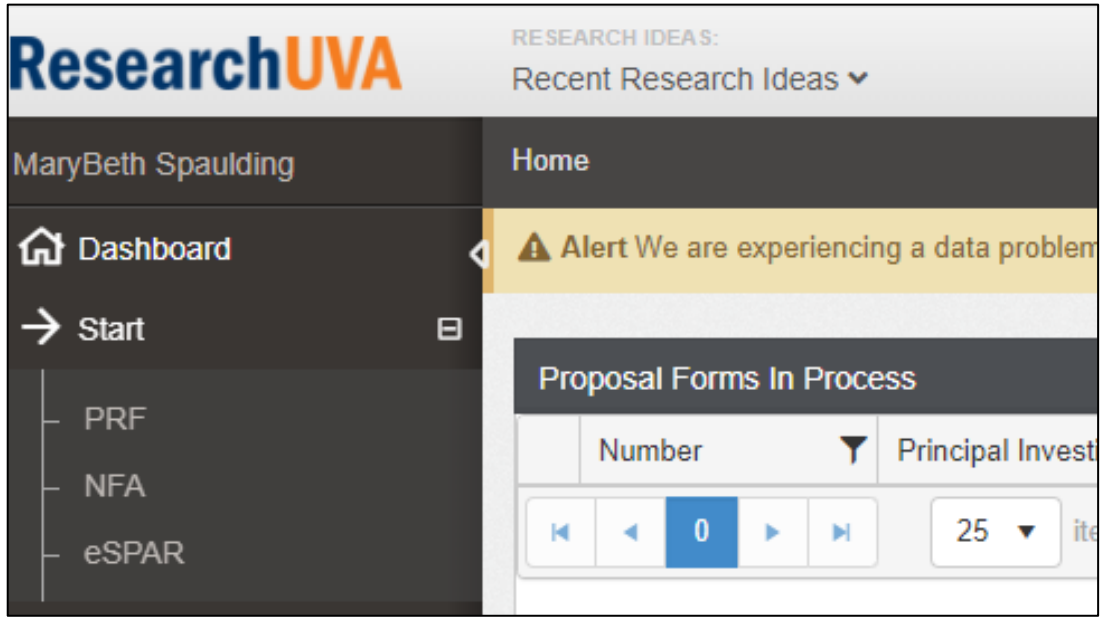
Overview: Business Process in ResearchUVA PBH

ResearchUVA PBH will replace legacy ResearchUVA and will be used to manage many business processes including:

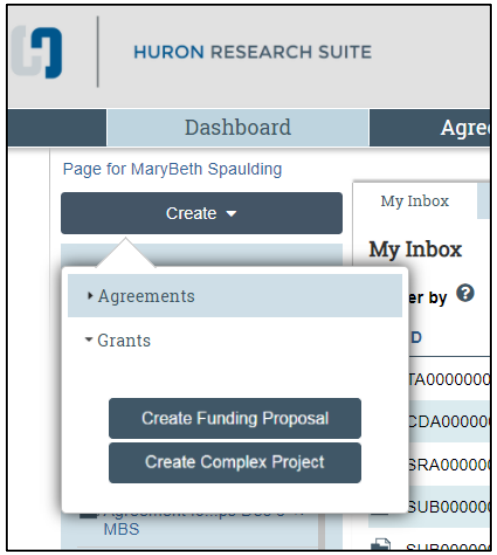
Legacy ResearchUVA	ResearchUVA PBH – Departments/Schools	ResearchUVA PBH – OSP/Submitting Schools
Route a Proposal (ePRF)	Create Funding Proposal (FP)	Review, Approve and Submit Proposal to Sponsor
Route an eSPAR Just-in-Time	Utilize Send Grants Status Activity within FP	Initiate and Approve a JIT Changes Required Action
Route an eSPAR At-risk Preliminary	Utilize Send Email Activity	Create and Setup Funding Award, Status Advance Account
Route an eSPAR Modification (Pre-Award Costs, NCE, PI Change)	Request Award Modification	Create Award Modification
Request an Outgoing Subaward (Email an SP-30 Form)	Create Agreement	Negotiate and Execute Agreement Create Award Modification
Route a Non-Funded Agreement (eNFA)	Create Agreement	Negotiate and Execute Agreement

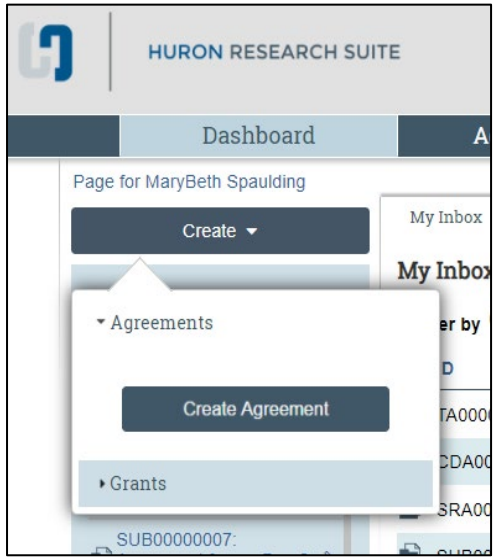
Overview: Business Process in ResearchUVA PBH

Legacy ResearchUVA – Start an Action



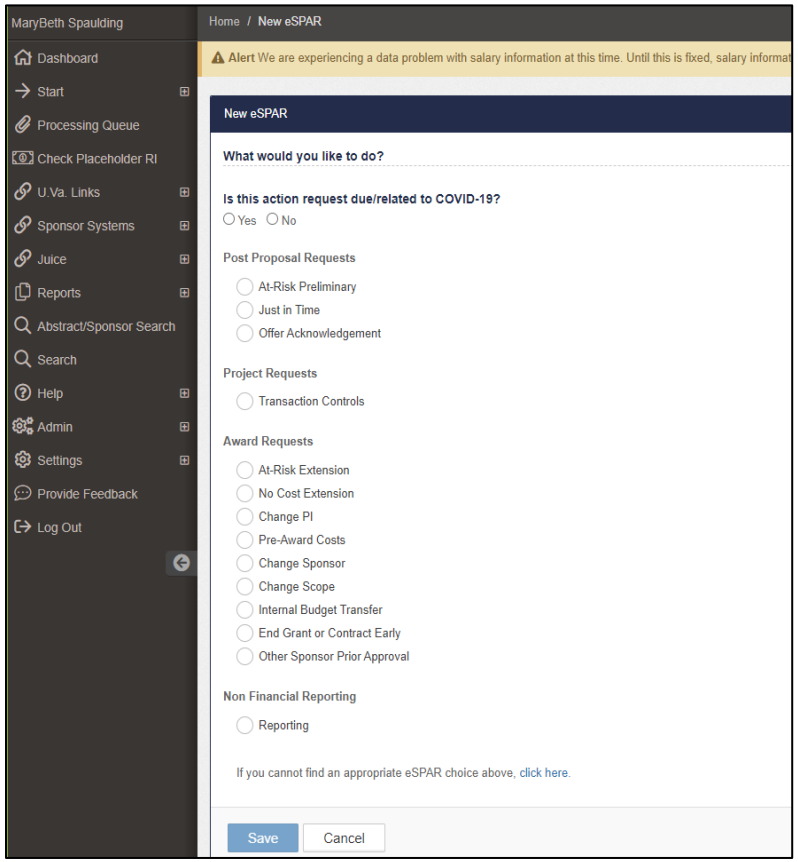
ResearchUVA PBH – Start an Action



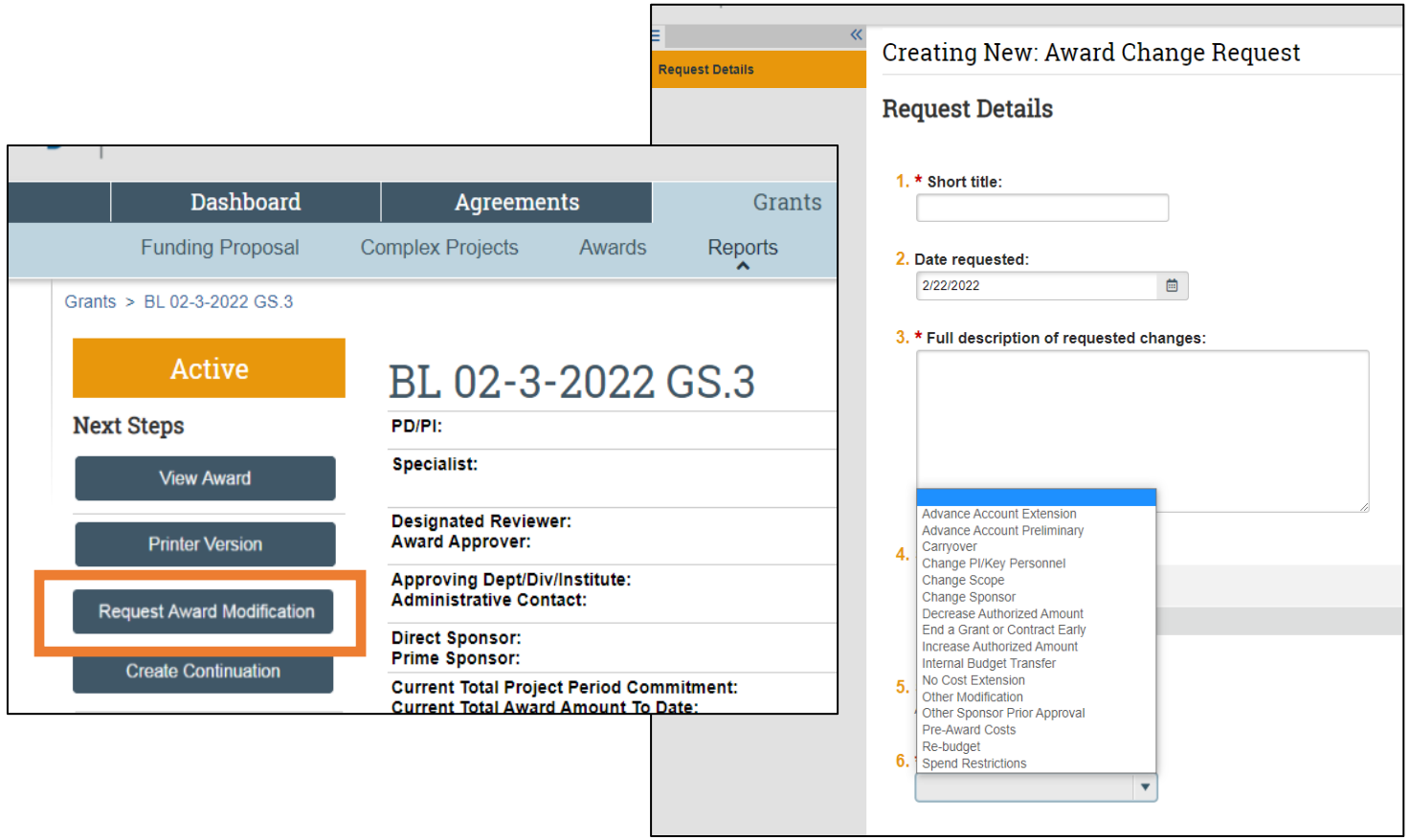


Overview: Business Process in ResearchUVA PBH

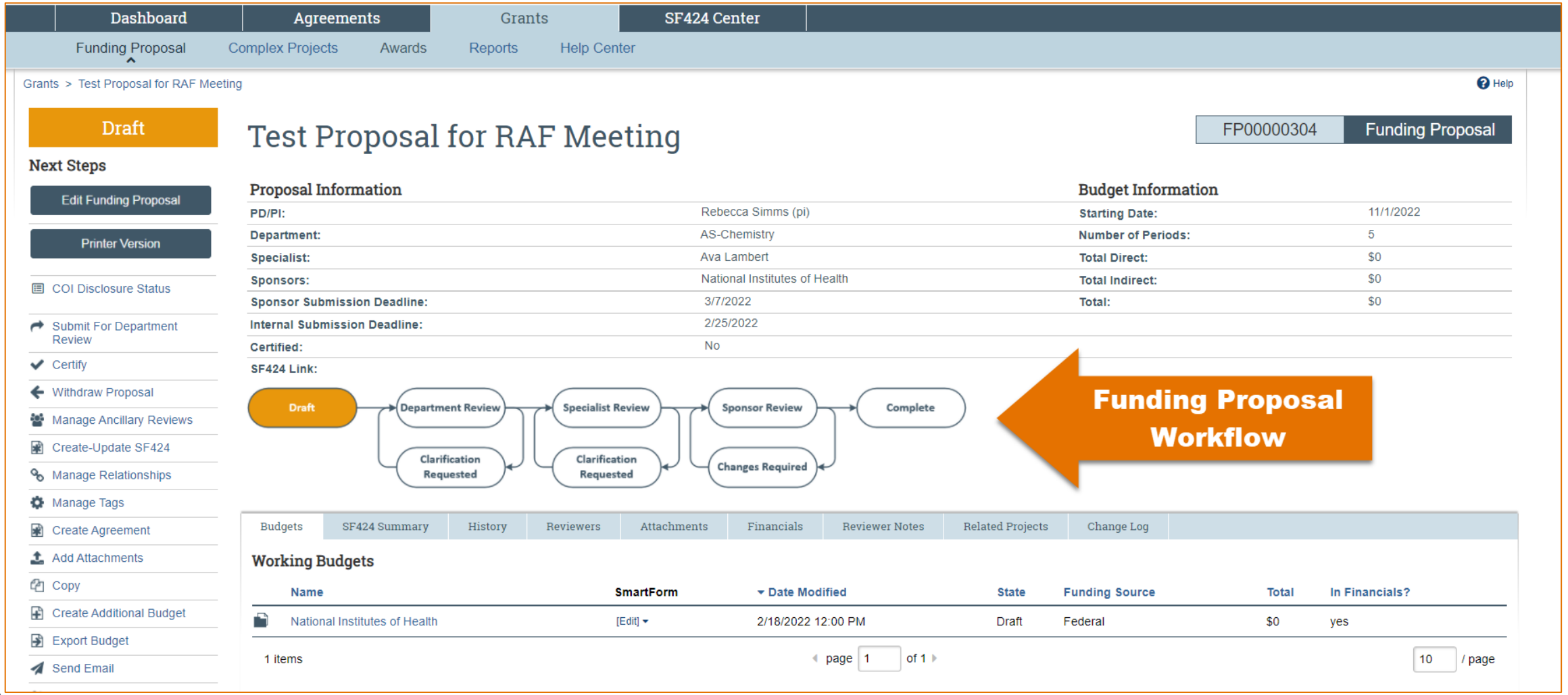
Legacy ResearchUVA – eSPAR



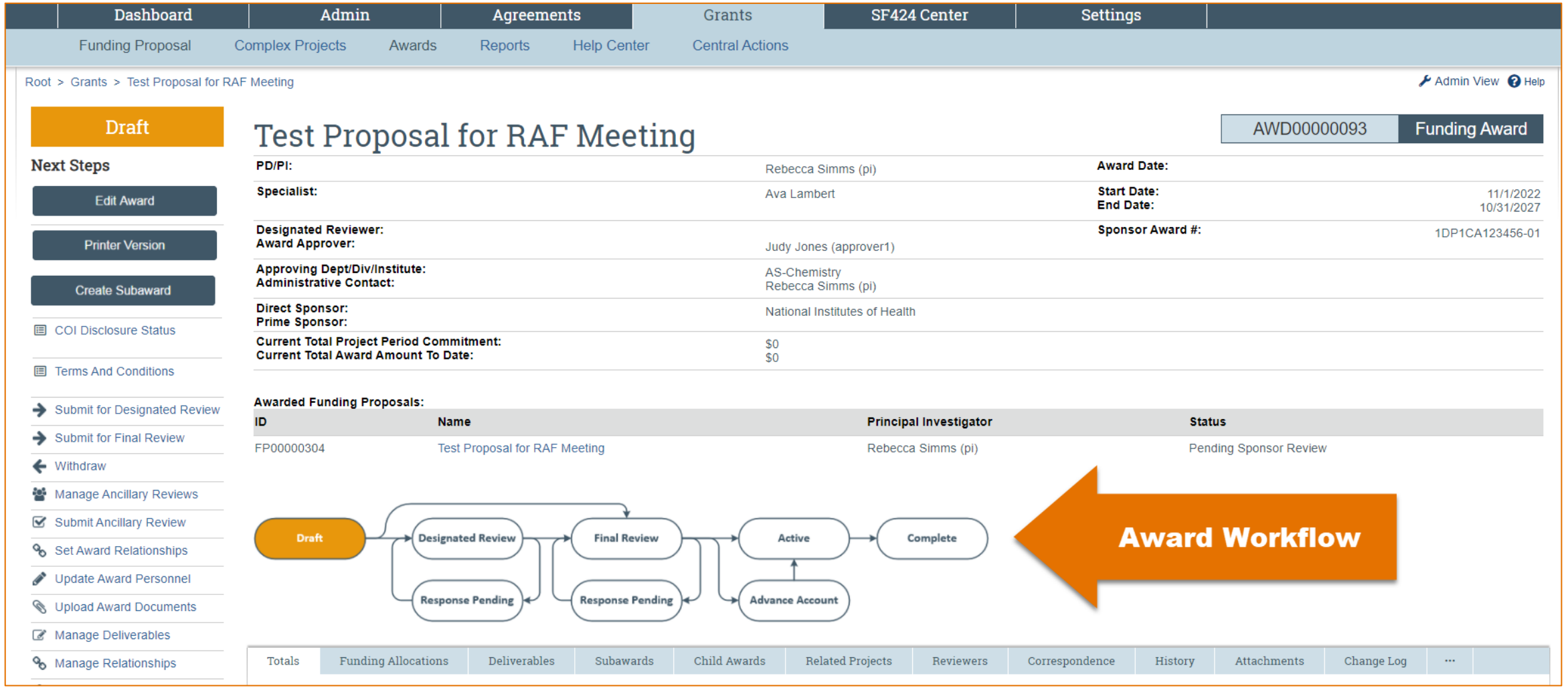
ResearchUVA PBH – Modification Request



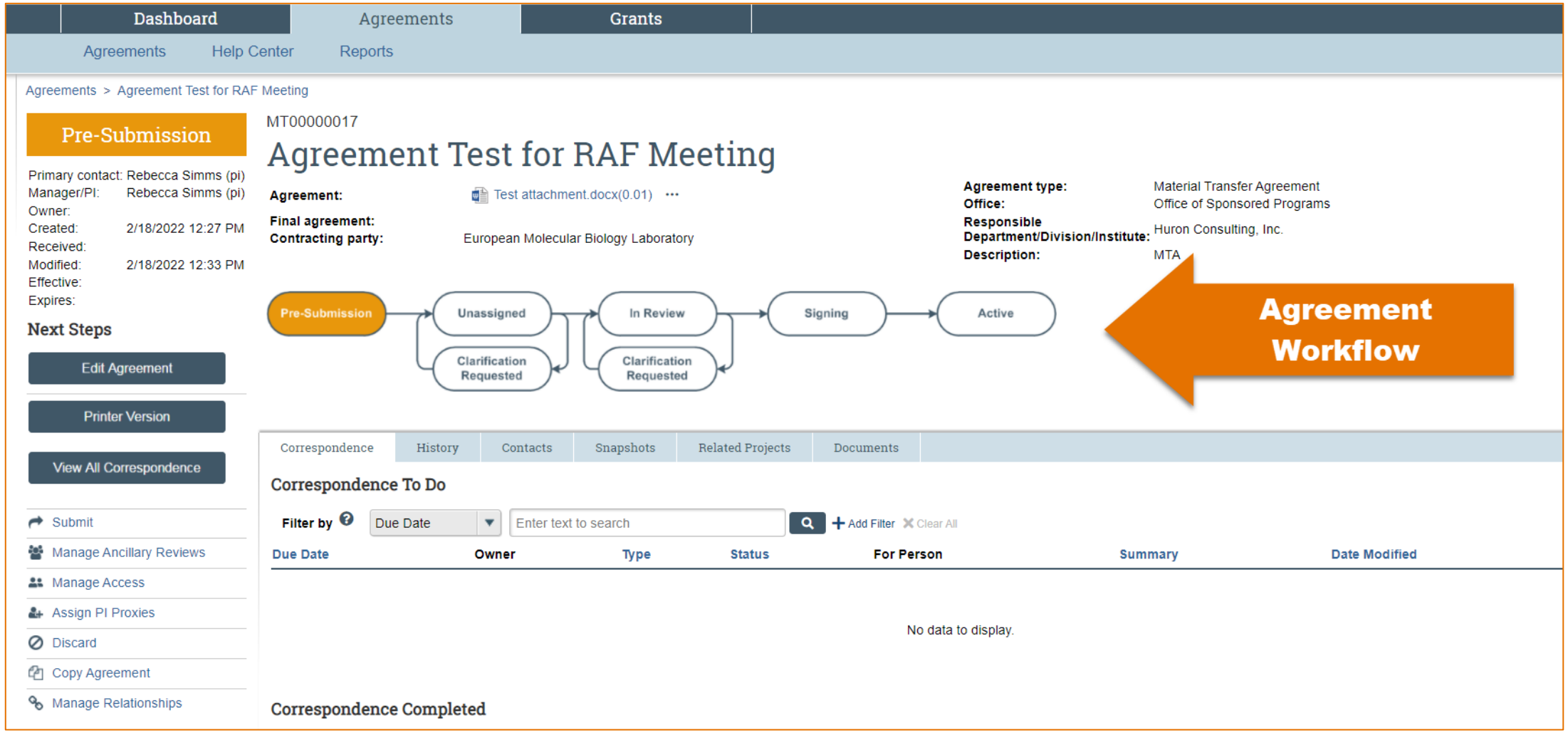
Workflow: Proposals



Workflow: Awards



Workflow: Agreements



ResearchUVA PBH: Learning Opportunities

The ResearchUVA PBH team is working on many activities and resources to help users prepare for the launch of the new system

	Learning Activity	Description	Timing
	Short Videos	Short recorded videos covering targeted topics available on-demand	Starting in February
	User Reference Guides	Detailed “how to” guides covering a major topic	March
	Job Aids	Succinct “how to” guides covering one task or activity in the system	March
	Checklists and Crosswalk tools	Additional guidance and reminders for filling out system form pages and tools for translating the legacy RUVA steps to the new ResearchUVA PBH modules	March
	Instructor-led Training (ILT)	Traditional sessions designed to teach users how to use the system; sessions will be recorded for on-demand viewing	April - May

Training Sessions & Short Videos

Instructor-led Training:

- Create and Submit a Proposal
- Create and Submit a Proposal: Budget Development
- Create and Submit a Proposal: Grants.gov submissions
- Managing Awards & Award Modifications
- Creating Agreements & Agreement Amendments
- Ancillary Reviewer Training (On-demand)
- Department Reviewer Training (On-demand)

Short Videos (For On-Demand Viewing):

- ResearchUVA PBH Overview / Tour
- Navigating the System

Reference Guides

- Research UVA Powered by Huron Overview
- Grants Reference Guide
- Agreements Reference Guide
- Ancillary Review Reference Guide
- Reporting Reference Guide

Job Aids

- Create a Single Project Proposal
- Fill Out Budget for Proposal
- Fill out Cost Share Budget
- Fill out a Subaward Budget
- Create or Update SF424 Forms
- Manage Relationships
- Submit an Award Modification Request
- Managing Award Deliverables
- Submitting an Agreement to OSP
- Just-in-time (JIT)
- PI Certification
- PI Approval for Outgoing Subawards

SmartForm Checklists

- Proposal
- Budget
- Award
- Award Modification Request
- Award Modification
- Outgoing Subaward Request

ResearchUVA PBH Support

Pre Go-Live Support

- Core Team members and OSP staff are meeting with units to present the system and discuss future state business processes
- ResearchUVA PBH is a featured topic at most research community meetings (RAF, CoRA, RAIT, Research Roundtable, etc.) and questions from these meetings are being added to the overall project FAQs
- ResearchUVA PBH support email address established ruva-huron-help@virginia.edu
- **Units can help by reviewing and cleaning up pending records in ResearchUVA**

Post Go-Live Support

- The ResearchUVA PBH website will serve as a "hub" for all learning and reference materials mentioned today
- OSP will conduct office hours to provide support after go-live
- OSP will provide tier 1 helpdesk support and will introduce an improved support/ticketing system to coincide with the system go-live. Emails sent to ruva-huron-help@virginia.edu will automatically generate a ticket in the new support system

Questions?

ruva-huron-help@virginia.edu