

Rebaseline Request

Project Name:	Novelution – Electronic Research Administration & Compliance (ERAC)
Sponsor:	Kelly Rusch/Grant McGimpsey
Date of Request:	4/20/2018
Requested By:	Large Project Oversight (LPO)
Project Manager:	Patricia Johnson

Reasons / Goals for Request:

Additional functionality requested by the campus teams for the Sponsored Research (SR) module (Change Requests 2 & 3) has contributed to a high schedule variance. Once development started, it became apparent that this was an overhaul that not only involved more time than originally anticipated, but also affected many other tasks that are dependent on its completion. This has caused a variance to schedule greater than 20% with no possibility to recover.

Additional sprints have been added to the fourth stage of SR Iterative Implementation in the project schedule in Team Dynamix to cover the following new functionality: enhancements to the Budget interface, and features that improve the subawards and subrecipient profiling capability and routing. The only way to be able to report actual variance to an updated schedule is to rebaseline – this would also provide a variance that is more realistic, making it easier to track progress.

Recommendations:

It should be noted that variance to the original baseline will still be reported at the end of the phase and project. This simply resets the variance to zero so future reporting will portray any new variance to the revised schedule.

If approved, Large Project Oversight will submit this report to the State Board of Higher Education and the Legislative IT Committee. Those entities will send requests to the sponsors should they wish them to testify regarding the project.

Impact: Schedule, due to additional Scope described below

1) Revision of Novelution Budget Interface (Change Request 2)

The specifications developed for the interface changes constituted a major upgrade of Novelution's complete budget functionality, essentially requiring a full re-architecture of the backend data model and services layer as well as a ground up re-implementation of the UX/front-end.

Functionality upgrades for budget include:

- Ability to split budget across multiple PIs, allowing simultaneous editing of each split.
- Ability to create and manage multiple "variations/versions" of a budget for development purposes, one of which can be specified as the "active" budget selected for a project.
- Replaced former model, which split costs between requested sponsor dollar amount and cost-share amount (assigned to source of cost share at high level), with model to support fully detailed, separate budgets, for requested dollars and each source of cost share.
- Adding backward calculations into new front-end interface - for example, entering requested dollar amounts for salary and calculating effort percentages with or without fringe.

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- Within a budget version, ability to filter budget view by any of the following 3 filters and manage budget data entry using any combination of 2 out of 3 filters: budget period, cost share source, departmental "split budget". I.e. View can filter to show:
 - 1 budget period broken down by cost share source and split budgets
 - 1 cost share source broken down by budget period and split budgets
 - 1 split budget broken down by budget period and cost share source
- Fully modified front-end for detailed budget entry form including:
 - Default single-page entry form for all budget categories, rather than, as before, modal form for each category entry submitted separately - modeled along the lines of the federal R&R budget form.
 - Optional drill-down views for more granular budget detail entry including different versions of form, based on budget category - distinct entry forms provided for:
 - Personnel details
 - Line-item breakdown for standard non-personnel categories
 - Specialized entry form for travel category breakdown
 - Specialized entry form for materials and capital equipment category breakdown

Major implications to project implementation requirements:

- Thorough architectural upgrade to data model and services layer, to support:
 - new budget version/variation feature
 - appropriate caching relating to new calculations required for data model
 - generic approach to budget categories with alternate, optional detail breakdowns.
 - new approach to cost share and split budget breakdowns.
- Fully new UX design incorporating core team and PI/RA user feedback
- Ground up development of new budget frontends

2) Enhancements to Subawards records (Change Request 3)

Relative to initial discovery specifications, significant additions were added to the data requirements specified for Subaward (SA) records with a many-to-many connection to Sponsored Research (SR) records as well as a many-to-one connection to related Subrecipient Institution Profile (SIP) records.

- SA and SIP records evolved to include significantly more potential data fields, as well as complex, conditional requirements.
- Configurable to support one institution, added more complex routing to support subrecipient user access and ability for invited sub-recipient users in different roles to complete subrecipient profiles or components of subaward record application forms.
- Added routing and validation complexity to support interconnected SR, SA, and SIP records which each can be in different states and have dependencies on each other. This led to more complex overall routing requirements for the Sponsored Research module, and the need for an improved infrastructure for presenting routing requirements to the end-user in the form of a "Conditions" table that will display the state of all routing conditions in a nonlinear form. This will allow users to see completed conditions checked off in the frontend as they occur, rather than merely viewing a linear status history.

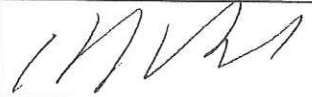

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- o This involves an upgrade to Novolution's back-end routing architecture to support the more flexible representation.

Solution:

Making the adjustment of rebaselining the project schedule to account for the additional functionality is recommended to provide a realistic calculated schedule that is more meaningful. The changes in functionality provide a superior end-result that was not anticipated during Discovery, but that both campus teams agree is needed.

Sponsor Approval Signature(s) and Date(s):

Signature:		Kelly A. Rusch, Ph.D., P.E. VP, Research and Creative Activity	Date:	4/20/18
Signature:			Date:	4/20/2018