

# Conference Call Minutes, 2009-05-28

## Minutes - ITANA Screen2Screen - May 28, 2009

### \*Attending\*

Jim Phelps, University of Wisconsin-Madison (chair)  
David Badger, Rutgers University  
Brendan Bellina, University of Southern California  
Frank Boshoff, U of Toronto  
Curtis Bray, University of California, Davis  
Steve Carmody, Brown University  
Tony Disanza, Innovative Consulting  
Mike Fary, University of Chicago  
Shelly Feran, McGill University  
Jan Grasser, Penn State University  
David Mak, Boston College  
Steve Mullins, University of Alaska  
Kent Percival, University of Guelph  
David Walker, University of California, Davis  
Ann West, Internet2  
Eric Westfall, Indiana University/Kuali  
Dean Woodbeck, Internet2 (scribe)

There were other attendees via Adobe Connect. Total attendance was 28.

### \*Screen2Screen Resources\*

The Screen2Screen is archived (via Adobe Connect) and the slide decks are available for download on the ITANA wiki (<https://spaces.at.internet2.edu/display/itana/Screen2Screen>)

### \*Kuali Introduction\*

Eric Westfall provided the first presentation in the Screen2Screen, providing an overview of Kuali RICE and briefly discussing other Kuali projects.

### \*Kuali on Campus\*

David Walker and Curtis Bray, both from UC Davis, gave a presentation, "Kuali on Campus," talking about their experience with Kuali and integration in a multi-campus system.

### \*Discussion\*

Jim Phelps reported on interesting discussions that took place at the recent EDUCUASE Enterprise conference. Representatives from the University of British Columbia discussed the differences between using a monolithic ERP from a vendor, as opposed to the ability to implement modules (as in the Kuali model).

Eric Westfall commented that Kuali intends that an institution does not have to implement every Kuali module, but only those for which there is a need. In that aspect, it is not a suite, but a collection of modules. Kuali is built by and for higher education. Kuali also strives for a goal of non-disruptive upgrades, so there is not a forced march of upgrades on periodic basis.

David Walker said that, in his experience, this modularity is good. Kuali's orientation is not "how do we lock in our customer base," but is that of a well-organized open-source, community-source project.

While Kuali is modular, there are some dependencies. The workflow module, for example, uses KIM for identity management, but a campus can customize the workflow to use an existing IdM system.

As an example, UC Davis is using KNS (Kuali Nervous System) with its merit and promotion system, MyInfoVault. Davis uses custom screens and picks which modules its application will use. For information on MyInfoVault, see the UC Davis wiki:<https://confluence.ucdavis.edu/confluence/x/bEo>

There was also discussion about eDoc Lite, part of Kuali Enterprise Workflow (KEW), used to create simple documents. It is possible, for example, to bring up RICE on campus, but then just use the eDoc Lite application, if that is the one of most interest.

UC Davis uses eDoc Lite, but is also thinking of KEW as an infrastructure for multiple applications. The point is to have end users respond with just one workflow system, rather than a different system for each application. Davis uses eDoc Lite to automate processes that have been paper-based, as well as to track where an item is in the process.

Other campuses also reported some interest in the Kuali modules. USC is committed to Kuali Financial and Kuali Student and is interested in exploring RICE. Clemson uses PeopleSoft financial, but is interested in COEUS and Kuali Financial. Eric mentioned that Indiana has uses PeopleSoft as its student system and HR system, but that they have built RICE applications that interface with PeopleSoft.

### \*ITANA Follow-on Activities\*

Are there follow-on activities, based on these discussions, that ITANA should consider?

One of the challenges in implementing RICE is a lack of understanding, among IT people and others, as to what fits into middleware layer and what fits into an application. For example, someone might think workflow should fit with an application, when it may be better used in the middleware layer. Perhaps a white paper or some type of best practices document would help - describing what it means to have a middleware layer and how it fits in with this space (from the Kualu point of view and from other points of view.

There is also interest in case studies from institutions moving away from ERPs to modular solutions like Kualu.

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**\*Survey\***

If you participated in the Screen2Screen, please fill out a short survey. Go to:[http://www.surveymonkey.com/s.aspx?sm=hmxoOH8ArIUSSRmGRp5TVQ\\_3d\\_3d](http://www.surveymonkey.com/s.aspx?sm=hmxoOH8ArIUSSRmGRp5TVQ_3d_3d)

**\*Next Conference Call - June 11, 2009 - 2 p.m. (EDT)\***