CONVERIS at Kent
Research and Evaluation Seminar 13th May 2015, Praha

Renáta McDonnell
KRIMSON Project Manager, Research Services,
University of Kent

Contact details:
r.mcdonnell@kent.ac.uk
+44 (1227) 82 3190
Overview

• Why CONVERIS?

• A bit about Kent... Context

• Project Plan

• Progress
  ▪ Successes
  ▪ Challenges

• To Do

• Summary
Why CONVERIS?

• Efficiency, Analytics, Value Added,... etc
• Mature system
• Scope of the system
• Standards
• Interoperability
• Flexibility
• Price
• ... Fit with our requirements.
University of Kent

• **Top 20 (for teaching)**
  - Recent expansion → 20,000 students

• **Research Intensive**
  - Medium and growing
  - 17th in REF 2014 in the UK for research intensity
  - 40% increase in research active staff submitted since 2008

• **Ambitious**
  - UK’s European University
  - Campuses and Centres
Research Applications #: GREEN

Compared to 5-yr rolling ave: <5yr; 0-10%>5yr; >10%>5yr

Cumulative number of applications

<table>
<thead>
<tr>
<th></th>
<th>Aug</th>
<th>Sep</th>
<th>Oct</th>
<th>Nov</th>
<th>Dec</th>
<th>Jan</th>
<th>Feb</th>
<th>Mar</th>
<th>Apr</th>
<th>May</th>
<th>Jun</th>
<th>Jul</th>
</tr>
</thead>
<tbody>
<tr>
<td>2014/2015</td>
<td>12</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2013/2014</td>
<td></td>
<td>28</td>
<td>85</td>
<td>158</td>
<td>202</td>
<td>219</td>
<td>266</td>
<td>303</td>
<td>393</td>
<td>476</td>
<td>525</td>
<td>571</td>
</tr>
<tr>
<td>2012/2013</td>
<td></td>
<td>24</td>
<td>55</td>
<td>121</td>
<td>180</td>
<td>205</td>
<td>255</td>
<td>299</td>
<td>349</td>
<td>408</td>
<td>449</td>
<td>479</td>
</tr>
<tr>
<td>2011/2012</td>
<td></td>
<td>25</td>
<td>66</td>
<td>140</td>
<td>212</td>
<td>239</td>
<td>282</td>
<td>328</td>
<td>382</td>
<td>424</td>
<td>467</td>
<td>496</td>
</tr>
<tr>
<td>2010/2011</td>
<td></td>
<td>26</td>
<td>57</td>
<td>137</td>
<td>215</td>
<td>245</td>
<td>293</td>
<td>346</td>
<td>425</td>
<td>455</td>
<td>486</td>
<td>504</td>
</tr>
<tr>
<td>2009/2010</td>
<td></td>
<td>22</td>
<td>73</td>
<td>119</td>
<td>192</td>
<td>232</td>
<td>284</td>
<td>328</td>
<td>401</td>
<td>442</td>
<td>477</td>
<td>519</td>
</tr>
<tr>
<td>5-year average</td>
<td>25</td>
<td>67</td>
<td>135</td>
<td>200</td>
<td>228</td>
<td>276</td>
<td>321</td>
<td>390</td>
<td>441</td>
<td>481</td>
<td>514</td>
<td>544</td>
</tr>
</tbody>
</table>

601/544 = 1.105 = +10.5%
Research Awards #: AMBER

 Compared to 5-yr rolling ave: <5yr; 0-10%>5yr; >10%>5yr

\[
\frac{244}{223} = 1.094 = +9.4\%
\]
Research Awards £: GREEN

Compared to 5-yr rolling ave: <5yr; 0-10%>5yr; >10%>5yr

17.61/13.76 = 1.280 = +28.0%
Cradle to Grave Support: RS & KIE

- Identify funders
  Help with the proposal and application process

- Costing
- Institutional ‘sign off’
  ‘Accept’ award and negotiate contract

- Manage Award
- Financial claims
  End of Award reports
Project Plan

- 2012 Project approval
- Feb 2013 Project kick-off [Project Manager]
- Jun 2013 Procurement
- Sept 2013 Implementation requirements
- April 2014 Pilot
- Aug 2014 Go-live
CONVERIS – what do we have?

- Pre and post award management
- Publications management
- Configuration module
- Research Analytics (CRA configuration admin)

- v5.5.6
- Hosted at Thomson Reuters
KRIMSON: AMBER

Aug 2014: *No Go-live; Partial Go-live; Go-live on time*

The university’s new “Kent Research and Innovation Management System, ON-line” KRIMSON aims to deliver better management of information on proposals and projects.

- **Aug 2014 Go-live with phase 1a – pre-award**
- **June 2015 Go-live with phase 1b – post-award**
- **July 2015 Go-live with phase 2 - publications**
- **September 2015 Go-live with phase 3 – mini CV**
Progress

• **Live with pre-award:**
  - Pilot with 3 (from 20) Schools: Apr 2014 - Jul 2014
  - Live across the University from 4th Aug 2014
  - Shared across RS and KIE

• **Integrations:**
  - University login - Single sign-on (Shibboleth)
  - Integrated with HR database (Core)
  - Almost Integrated with Agresso
CONVERIS vs Kent Integration

KRIMSON Context Diagram

- Researchers
  - HR system
  - University login system
- Publications
  - KAR (Kent Academic Repository)
- Research students
  - Student data System
- Operations Office
- Researchers
- Other University staff (e.g. SAMs, HOSs, DORs)

Phase 1
Phase 2
Phase 3

Costing tool
- pFACT
- Agresso Financials

University of Kent
Home Screen

![Conversis Home Screen](image-url)

- **Project Applications (1)**
- **Type of project application**
  - KIE (Kent Innovation & Enterprise)
  - RS (Research Services)

**Dashboard > Project Applications**

**Project Applications**

- Select / Deselect all
- Updated on: descending

**Information about the selected Type of project application**

- **KIE (Kent Innovation & Enterprise)**
- **RS (Research Services)**
Workflow, and project (proposal) set up

Test
Project Application ID: 1169
(McDonnell, Renata - Research Services) Adrienne Cullingford:
Consultancy 14/05/2015

Status: Funder accepted and saved as project
Visibility: Not publicly visible

<table>
<thead>
<tr>
<th>Set up application</th>
<th>RS update</th>
<th>Peer Review</th>
<th>PI approval</th>
<th>Col approval</th>
</tr>
</thead>
<tbody>
<tr>
<td>School approval</td>
<td>RS approval</td>
<td>University approval</td>
<td>Funder decision</td>
<td>Ideas &amp; Themes</td>
</tr>
<tr>
<td>Tasks</td>
<td>Documents</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Basic Project Information

Before completing this form, please click on the ‘Save’ button at the bottom of this page in order to generate a Project Application ID.

Project Application ID:
1169

Type of project application:
RS (Research $)

Project title:
Test

Project acronym:

Brief description:
More project (proposal) set up

Start date: 13/08/2014

End date: 22/08/2014

PI first and last name: *

The ‘Attribution in %’ field is used for internal reporting. Please enter the % of the project that should be reported against each investigator at Kent. It should add up to 100%. It is NOT your time spent on the project.

<table>
<thead>
<tr>
<th>Name</th>
<th>Organisation</th>
<th>Attribution in %</th>
</tr>
</thead>
<tbody>
<tr>
<td>McDonnell, Renata</td>
<td>Research Services (Vice Chancellor’s Section-Research)</td>
<td></td>
</tr>
</tbody>
</table>

Kent Col first and last name:

Funder & Scheme: *

If ‘Other – to be added’ selected, please specify a funder and a scheme:

External Collaborator:

Select any organisation(s) that are working with you on the project effectively as external Co-Investigator(s). If your collaborator does not appear in the drop-down list please give details in the “other” box below and RAE will add them for you. Furthermore, if Kent is not leading the project, please select the Lead Collaborator.

If ‘Other – to be added’ selected, please specify a collaborator:
More project (proposal) set up

Project Partner:

Select any organisation(s) that are providing a cash or in-kind contribution towards the project but will not be receiving funding. This mainly applies to Research Council applications. If your Partner does not appear in the drop-down list please give details in the “other” box below and R&IE will add them for you.

If 'Other - to be added' selected, please specify a partner

Funder point of contact:

Is Kent the lead applicant:

Select partner type

Call deadline:

Call identifier:

Expected decision date:
More project (proposal) set up

### Ethics & Governance *

#### Human participation:

Does the proposed project involve human participants or analysis of data from which individuals could be identified?

- [ ] Select yes or no

#### Research Gov. Framework:

Does the proposed project involve patients / service-users, relatives, carers, staff, tissues, data and / or premises in the NHS or adult social care?

- [ ] Select yes or no

#### Human Tissue Act:

Does the proposed project involve samples or material containing human cells?

- [ ] Select yes or no

#### Mental Capacity Act:

Does the proposed project involve participants who may not have capacity to consent to participation?

- [ ] Select yes or no

#### Animal participation:

Does the proposed project involve animals?

- [ ] Select yes or no
More project (proposal) set up

**IS support requirement**

Does your project require IS support?

Clicking "yes" confirms that your proposed research might benefit from Library and/or IT support within the Information Services department. IS will contact you to discuss your requirements and provide advice for your application funding bid.

To view IS research support webpage, please follow this link: http://www.kent.ac.uk/is/researchsupport/index.html

**Do you need support from IS:**

- No

**Please add details of IS requirements below:**

---

**RS/KIE support contact(s)**

Please select RS/KIE support contacts. If you are not sure who to select, follow the URL below the "Notes" field.

For RS contacts only: Please select the relevant people from both the Funding and Contracts team.

<table>
<thead>
<tr>
<th>Name</th>
<th>Email</th>
<th>Organisation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lingley, Brian</td>
<td><a href="mailto:B.Lingley@kent.ac.uk">B.Lingley@kent.ac.uk</a></td>
<td>Research Services (Vice Chancellor's Section-Research)</td>
</tr>
<tr>
<td>Benstead, Jane</td>
<td><a href="mailto:J.Benstead@kent.ac.uk">J.Benstead@kent.ac.uk</a></td>
<td>Research Services (Vice Chancellor's Section-Research)</td>
</tr>
<tr>
<td>Godfrey, Sarah</td>
<td><a href="mailto:S.H.Godfrey@kent.ac.uk">S.H.Godfrey@kent.ac.uk</a></td>
<td>Research Services (Vice Chancellor's Section-Research)</td>
</tr>
</tbody>
</table>

**Notes:**

---

To view RS and KIE support contacts, please click below: http://www.kent.ac.uk/researchservices/krimson/rs-kie-contacts.html

**REMINDER:** Please remember to upload the latest version of the application in the Document section.
Phew! Moving through the workflow

Set status

You can post a comment.

Draft
Open
For RS / KIE Update
For PI/Col approval
For School approval
For RS / KIE approval
For University approval

Cancel  Done
Declarations

Declaration by Kent Principal Investigator

I agree to comply with all relevant legislation, statutory requirements (e.g. licences, authorisations and approvals), professional guidelines and University of Kent policies during the conduct of this project.

I have read and agree to the responsibilities of Principal and Co Investigators of Research Grants and Contracts (available at https://www.kent.ac.uk/researchservices/local/managing/responsibilities.html).

I have not previously had an allegation of misconduct in research against me upheld at this or any other institution.

Good Proposal Bank:
If the proposal is successful, I agree to its being held in a Good Proposals Bank and made available to other applicants. Please indicate.

Select Good Proposal Bank

Project Requirements and Risk

Risk:
Does this project involve any significant risk (including fieldwork)? If yes, please attach a risk assessment.

Select yes or no

Personal data storage:
Does this project involve storing personal data on paper or electronically? If yes, please read and comply with the University’s Data Protection Code of Practice.

Select yes or no

Research abroad:
Does this project require any of the research to be undertaken abroad?

Select yes or no
Adding Approvers and getting Col Approval

School approvers *

To view RS and KIE school approvers, please click below: http://www.kent.ac.uk/researchservices/krimson/school-approvers.html

Col approval

Kent Col first and last name:

<table>
<thead>
<tr>
<th>Name</th>
<th>Organisation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bavercstock, Clare</td>
<td>Research Services (Vice Chancellor's Section-Research)</td>
</tr>
</tbody>
</table>

Approved by:

<table>
<thead>
<tr>
<th>Name</th>
<th>Organisation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bavercstock, Clare</td>
<td>Research Services (Vice Chancellor's Section-Research)</td>
</tr>
</tbody>
</table>
Approving

RS approval

Commercial value:
Are the project results (knowledge, concepts, technology etc.) likely to be of value to business or public sector bodies?
Yes

Medical VAT exemption:
Do you consider that this project constitutes medical research for the purposes of establishing the VAT treatment of related purchases of eligible consumables and equipment?
No

The level of risk is deemed to be:
As per Research Services Procedure Note U17
1

Risk form attached:
No

University approvers *

<table>
<thead>
<tr>
<th>Name</th>
<th>Organisation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Woodger, Ruth</td>
<td>Research Services (Vice Chancellor's Section-Research)</td>
</tr>
</tbody>
</table>
The Result...

Set status

You can post a comment.

For Funder submission
Application submitted to Funder
Under contract negotiation
Declined / withdrawn
Funder accepted and saved as project
Funder accepted: proceed to next stage
Archived

Cancel  Done
## Awarded Applications

### Projects (132)

<table>
<thead>
<tr>
<th>Select / Deselect all</th>
<th>Updated on descending</th>
<th>10</th>
<th>50</th>
<th>100</th>
<th>1 of 14</th>
</tr>
</thead>
</table>

#### iGem 2015
- **RS (Research Services)**
- **Project identifier**: 6867
- Xue, Wei-Fang
- School of Biosciences

#### Precious-metal free Sonogashira cross-coupling: Carbon-Carbon bond formation by solvation induced reductive elimination from Pd
- **RS (Research Services)**
- **Project identifier**: 7076
- Clark, Ewan
- School of Physical Sciences

#### Telefonica O2 Workshop - Well-Being - Aug 2014
- **KIE (Kent Innovation & Enterprise)**
- **Project identifier**: 13491349
- Wack, Mano
- School of Psychology
Admin

Administration

User Management
- User management
- User and entry point import

Language related properties
- Property Bundles
- Import labels
- Export Labels

Structural editors
- Selection criteria editor
- Tree editor

Data management
- Excel import
- Generate auto-relations
- Citation retrieval
- File Upload
- IR Config

Statistics
- Usage statistics
- Content Statistics

Settings
- Research portal
- Registration
Configuration

Activities
- Timers (15)
- ChoiceGroups (127)
- Constants (241)

Persons

Organisations

Classifications

Notifications

Statistics

Admin settings

Configuration

Rights management
- User Roles (30)
- Basic Roles (202)
- Special rights (137)
- Create Rights (66)
- Module permissions (36)
- Workflow Matrix (183)

Module settings
- Statistics (10)
- Save IO configuration (4)
- Copy relation rules (4)
- Filter Config (99)
- Clone IO configuration (2)
- Grouping of Entity icons

Test environment
- Information Objects
- Relations
- Auto-relations

InfoObjectTypes (54)
- InfoObject Type Attributes (816)
- Relation Types (221)
- Relation Type Attributes (116)
- AutoRelation Types (22)
- Relation chain group (21)
- Data Integration Processes (8)
- Pentaho roles mapping

InfoObject related Templates (584 + 219 + 30)
- Report Templates (13)
- CV templates and content (2)
- PremiumRole Has DynaTemplates (2)
The Support Website

KTRIMOS Sscope
The implementation of KTRIMOS commenced in 2014 and has been divided into three main phases:

- Pre and post award workflow
- Integration with Kent Academic Repository (KAR)
- Muni CV

Following extensive planning and development, the schedule for implementing these phases was agreed as per the below.

Phase 1: Pre and Post Award Workflow
Start Date: Pilot Phase - April – July 2014 / University Wide - August 2014

This phase enables researchers to submit their applications electronically for subsequent approval, costing and pricing by Research Services and Kent Innovation and Enterprise. It will also provide electronic approval by Co-Investigators, Heads of Schools and the University.

KTRIMOS was initially piloted by three schools (one from each faculty) from April to July 2014. The pilot schools were Kent Law School, School of Engineering and Digital Arts and the School of European Culture and Languages. Following successful completion and feedback from this pilot phase, KTRIMOS was implemented University wide in August 2014.

Phase 2: Integration with Kent Academic Repository (KAR)
Phase 3: Muni CV
The Support Website

Welcome to KRIMSON

In line with the University Research and Impact Strategy 2013-16, the University of Kent has invested in a new system called KRIMSON – Kent Research & Innovation Management System On-line. KRIMSON supports the operations of Research Services (RS) and Kent Innovation & Enterprise (KIE) and also provides enhanced reporting.

KRIMSON collates information on research staff, publications, projects and proposals, research student supervision and other research-related activities. It is used by RS and KIE staff as well as researchers, academic managers and administrators.

The system is supplied by Thomson Reuters and is used by many Universities worldwide. After a successful three-month pilot phase, KRIMSON went live University wide in August 2014.

Announcements

How to login to KRIMSON
This URL for KRIMSON is: https://kent.avidas.com/conversie. Input your usual University user name and password on the Kent IT account login page (click on...

KRIMSON goes LIVE! University wide
This KRIMSON system is now LIVE University wide for pro award management. Any new project ideas or applications should be input into KRIMSON for subsequent...
The Support Website
The Support - Training

Training

If you are intending to apply for funding then you'll need to learn how to use KRIMSON. Booking your space on a training session is easy - just choose the most suitable slot available and email your request to krimson@kent.ac.uk.

<table>
<thead>
<tr>
<th>Date</th>
<th>Time</th>
<th>Location</th>
<th>Space Available</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wednesday 10th December 2014</td>
<td>2pm - 3pm</td>
<td>Templeman Library TR 301</td>
<td>10 spaces</td>
</tr>
<tr>
<td>Wednesday 7th January 2015</td>
<td>2pm - 3pm</td>
<td>Templeman Library TR 301</td>
<td>10 spaces</td>
</tr>
<tr>
<td>Wednesday 14th January 2015</td>
<td>2pm - 3pm</td>
<td>Templeman Library TR 301</td>
<td>10 spaces</td>
</tr>
<tr>
<td>Wednesday 15th January 2015</td>
<td>2pm - 3pm</td>
<td>M3-28 (IT room in Modway Building)</td>
<td>17 spaces</td>
</tr>
<tr>
<td>Wednesday 11th February 2015</td>
<td>2pm - 3pm</td>
<td>Templeman Library TR 301</td>
<td>10 spaces</td>
</tr>
<tr>
<td>Wednesday 18th February 2015</td>
<td>2pm - 3pm</td>
<td>Templeman Library TR 301</td>
<td>9 spaces</td>
</tr>
<tr>
<td>Wednesday 25th February 2015</td>
<td>2pm - 3pm</td>
<td>Templeman Library TR 301</td>
<td>9 spaces</td>
</tr>
<tr>
<td>Wednesday 04th March 2015</td>
<td>2pm - 3pm</td>
<td>Templeman Library TR 301</td>
<td>10 spaces</td>
</tr>
<tr>
<td>Wednesday 25th March 2015</td>
<td>2pm - 3pm</td>
<td>Templeman Library TR 301</td>
<td>10 spaces</td>
</tr>
<tr>
<td>Wednesday 01st April 2016</td>
<td>2pm - 3pm</td>
<td>N2N5 Rudhertor College</td>
<td>1 space</td>
</tr>
</tbody>
</table>
The Result...

• 620 Active Users

• 711 proposals
  ▪ 558 RS
  ▪ 153 KIE

• 132 projects
  ▪ 76 RS
  ▪ 56 KIE
Challenges

• *Interregnum with Avedas ➔ TR*

• *Loss of Project Manager at Kent*

• *Loss of Project Manager at TR*

• *Technical issues with file transfer verification*

• *Technical issues with EPrints interface*

• *Some usability issues...*

• *A few staff not engaging... but only a few*
To Do

• Integration with Agresso Finance
• Integration with EPrints
• Integration with ORCID
• Integration with SITS
• Develop Impact Activities
• Re-Integration with new HR system
• OA compliance? Researchfish?
• Keep adding and refining
• ... Costing and Pricing!
Summary

- Progress To Date
  - Pretty good
  - Delays
  - In budget

- Future Work
  - Integration
  - Integration
  - Integration
    - Buy-in, reporting, refinement, developments, ...