# Kuali Days 2024 | Monday, April 15, 2024

| | Build | Financials | Ready | Research A | Research B | Student |
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| 7:30 AM – 8:30 AM | Breakfast in Salon A<br>*We're setting aside space for you to dine with conference attendees with similar interests to connect. Signs on tables will indicate the topic being discussed.* | | | | | |
| 8:30 AM – 9:15 AM | **General Session: Welcome & State of Kuali**<br>**Presenter(s):** Joel Dehlin, CEO; Tadd Giles, CTO<br>**Room:** Salon B | | | | | |
| 9:30 AM – 12:15 PM | **Visit Kuali's Support Lab!**<br>Chat with a Kuali customer success team member to get in-depth help or have complex questions answered.<br>**Facilitators:** Kuali's Customer Success Team<br>**Room:** Barcelona | | | | | |
| 9:30 AM – 10:15 AM | **Are you New to Kuali Build? Come see what all the excitement is about!**<br><br>Kuali Build is our no-code forms and workflow automation platform in use at more than 50 schools! Learn about key features, the latest enhancements, and how you can use Build at your campus to replace paper and PDFs and empower citizen developers!<br><br>**Presenter(s):** Pauline Fetters, Customer Success Manager, Kuali<br><br>**Room:** Salon D | **Product Update**<br><br>A look at recent updates and review what's on the horizon for Financials.<br><br>**Presenter(s):** Lesley Markesbery, Senior Engineering Manager, Kuali; Heather Elyea, Product Manager, Kuali<br><br>**Room:** Melbourne | **Learn about Next-Gen Kuali Ready**<br><br>Join us for an overview of our completely redesigned Business Continuity Planning product, Kuali Read. You'll learn how you can use this new, incredibly flexible tool to help your campus create and manage continuity plans with ease. We'll share the great functionality that's available today as well as the enhancements the team is currently working on so you can plan out when your institution is ready to transition.<br><br>**Presenter(s):** Missy Krewson, Product Manager, Kuali<br><br>**Room:** Naples | **Learn About Next-Gen Sponsored Programs**<br><br>Join us for an overview of our completely redesigned Sponsored Programs product. You'll learn how you can use this new, incredibly flexible toolset to manage limited submissions & internal competitions, pre-award, post-award, negotiations, and subawards. We'll share the great functionality that's available today as well as the enhancements the team is currently working on so you can plan out when your institution is ready to transition.<br><br>**Presenter(s):** Victor Kinzer, Product Manager, Kuali<br><br>**Room:** Salon C | **What's New in Classic COI and Protocols**<br><br>While we're focusing a lot of design and engineering effort on our Next-Gen suite, we've found time to make some key enhancements to our Classic Research suite in the areas of COI and Protocols. Join us to hear about recent enhancements across the classic suite to make sure you're getting the most out of the products today.<br><br>**Presenter(s):** Jen Grau, Product Manager, Kuali & Jessica Peck, Director of Customer Support, Kuali<br><br>**Room:** Tokyo / Vancouver | **Learn About Next-Gen Curriculum Management**<br><br>Join us for an overview of our Next-Generation Curriculum Management product. You'll learn how you can use this new, flexible tool to manage courses, programs, experiences, specializations, and more. We'll share the great functionality that's available today as well as the enhancements the team is currently working on so you can plan out when your institution is ready to transition.<br><br>**Presenter(s):** Hannah Martinez, Product Manager, Kuali<br><br>**Room:** Casablanca |
| 10:15 AM – 10:30 AM | Refreshment Break in the Centennial Ballroom Foyer | | | | | |

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| **10:30 AM – 11:15 AM** | **Build for HR Departments**<br><br>Human Resources forms are among the most frequently developed by Kuali Build customers. In this session, the team from Occidental College will talk about how they digitized forms and processes to improve the effectiveness of their HR function.<br><br>**Presenter(s):** Jessica Ochoa, HR Recruitment Administrator, Occidental College<br><br>**Room:** Salon D | **Evolution of Integrations for UConn's Cloud-Hosted Migration**<br><br>Follow along with UConn as we discuss the evolution of our integrations from multiple on-premise upgrades to finally being hosted in the Kuali Cloud. These helped reduce the number of customizations in our overlay and provided additional functionality for other applications that interact with UConn's financial data.<br><br>**Presenter(s):** Richard Ritchie, Lead Software Developer, University of Connecticut; Paul Morano, Software Developer, University of Connecticut<br><br>**Room:** Melbourne | **Migrating to Next-Gen Ready: What Does the Path Look Like?**<br><br>Are you interested in migrating to our new Ready product? Not yet ready but hoping to plan for the future? In this session, we'll take you through how you'll work with our customer success team members to plan your transition and what you can expect along the way.<br><br>**Presenter(s):** Janice Ruff, Customer Success Manager, Kuali<br><br>**Room:** Naples | **Migrating to Next-Gen Research: What Does the Path Look Like?**<br><br>Are you interested in migrating to one or more modules of the Next-Gen Research suite? Not yet ready but hoping to plan for the future? In this session, we'll take you through how you'll work with our customer success team members to plan your transition and what you can expect along the way.<br><br>**Presenter(s):** Kat Szulc, Director of Professional Services, Kuali & Victor Kinzer, Product Manager, Kuali<br><br>**Room:** Salon C | **Ask the Experts!**<br><br>Do you have burning questions about how to accomplish something in Kuali Research? Our team of Research experts are here to answer your questions. Drop in with your list and we'll do our best to get you the answers you need.<br><br>**Presenter(s):** Customer Success Team<br><br>**Room:** Tokyo / Vancouver | **Come Discuss Next-Gen Curriculum Management Features with Us**<br><br>Join other Student customers and the Student product team to discuss and provide feedback for future Next-Gen Curriculum Management features. Come be a part of influencing the future of Curriculum Management!<br><br>**Facilitator:** Hannah Martinez, Product Manager, Kuali<br><br>**Room:** Casablanca |
| **11:30 AM – 12:15 PM** | **CSU Fresno's Digital One Stop**<br>The urgency for Digital Transformation at Fresno State is driven by the imperative to prepare students for the demands of the digital age, enhance institutional efficiency, and stay relevant in a dynamic and competitive educational landscape. In this session, hear how Fresno State partners with Kuali to develop a "Digital One Stop" by introducing digital process automation applications, improving communication through personalized updates, and ensuring accessibility for a diverse range of prospects and current students. We will share how Kuali Build has elevated Fresno State to simplify the application process, reduce paperwork, and provide a more efficient and user-friendly digital experience for prospective Bulldog Bound - Guaranteed Admissions Program students. Additionally, integrated mobile and communication platforms help the university stay connected with applicants, providing timely updates and information.<br><br>**Presenter(s):** Max J. Tsai, Director of Planning & Digital Transformation, CSU Fresno; Esuri Peiris, Solution Analyst for Digital Transformation, CSU Fresno; Philip Jensen, Campus Application Developer, CSU Fresno<br><br>**Room:** Salon D | **Kuali Financials Reporting**<br><br>How to use our embedded reports to support your data needs.<br><br>**Presenter(s):** Kymber Taylor, Customer Success, Kuali<br><br>**Room:** Melbourne | **Business Continuity Basics**<br><br>What is this thing called Business Continuity? Join us for an overview of business continuity and why it should be on your priority list. This course will teach you why having sound business continuity plans can help save your department or business unit. Come learn how a business' ability to maintain a consistent existence is vital to business continuity.<br><br>**Presenter(s):** Terri Messer, Compliance Risk Officer Jackson State Community College<br><br>**Room:** Naples | **Research Administration Metrics for All!**<br><br>Join us for a robust discussion about key metrics in research administration. Learn what data your peers are reporting on, what tools they are using, and how they are solving common challenges. The session will be a facilitated discussion led by our presenters.<br><br>**Presenter(s):** Barbara Inderwiesche, Director, ERA, UC Irvine Chanell Rome, Assistant Director for Research Administrative Systems, University of Maryland, Baltimore County; Pat Slabach, Analyst, University of Maryland, Baltimore County<br><br>**Room:** Salon C | **Birds of a Feather: Creating Effective IRB Protocols Forms**<br><br>Join us for an informal roundtable discussion about how to create IRB Protocol forms that help your researchers enter the right information efficiently. Bring your examples to share!<br><br>**Facilitator:** Marlise Blackburn, Implementation Consultant, Kuali<br><br>**Room:** Tokyo / Vancouver | **Migrating to Next-Gen Curriculum Management & Catalog: What Does the Path Look Like?**<br><br>Are you interested in migrating to Next-Gen Curriculum Management & Catalog? Not yet ready but hoping to plan for the future? In this session, we'll take you through how you'll work with our customer success team members to plan your transition and what you can expect along the way.<br><br>**Presenter(s):** Amy Robertshaw, Senior Functional Consultant, Hannah Martinez, Product Manager, Kuali<br><br>**Room:** Casablanca |

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| **12:15 PM – 1:30 PM** | Lunch in Salon A | | | | | |
| **1:30 PM - 4:15 PM** | **Don't Forget to Visit the Kuali Design Lab!** <br><br> Drop into Kuali's Design Lab! Participate in user research with our designers and get a glimpse of future platform features that are in the design stage. <br> **Facilitators:** Kuali's UX Designers <br> **Room:** Barcelona | | | | | |
| **1:30 PM – 2:15 PM** | **\* Cross-Track Session \* (Build/Ready/ Research/Student)** <br><br> **Mastering Kuali Build Integrations** <br><br> In this session, you'll learn how to leverage Kuali's platform integration capabilities. Whether you're a beginner or an expert, bring your use cases and questions to share with your peers. <br><br> **Presenter(s):** Greg Mash, Customer Success Engineer, Kuali <br><br> **Room:** Salon B | **Two Years in: Updates from CSU, our early-adopter, on how things are going** <br><br> The close partnership between Kuali and CSU that resulted in the first self-hosted to SaaS migration didn't end when the system went live. You'll get an update from members of both teams on how the collaboration has evolved, lessons learned, and what the day-to-day experience is like two-years in. <br><br> **Presenter(s):** David Ryan, Business and Financial Services Executive Director/Controller, Colorado State University; Grant Polzer, KFS Operations System Analyst, Colorado State University; Terry Durkin, VP of Customer Success, Kuali Kymber Taylor, Customer Success, Kuali <br><br> **Room:** Melbourne | **Cybersecurity Tabletop Exercise (Part 1)** <br><br> Join us for a crucial cybersecurity tabletop exercise tailored for the higher education community. Dive deep into simulated cyber threats, develop incident response strategies, and fortify your institution's defense. Together, let's enhance our digital landscape's resilience and safeguard our academic assets. This session will take place in three parts, allowing time for the group to move through all the parts of the exercise. <br><br> **Presenter(s):** Eric Self, Account Executive, Kuali; Missy Krewson, Product Manager, Kuali <br><br> **Room:** Naples | **Learn about Next-Gen Research: COI/COC** <br><br> Join us for an overview of our redesigned COI/COC product. You'll learn how you can use our new product to capture both researcher conflict of interest and outside professional activities, along with management plans. We'll share the functionality that's available in our first release as well as the enhancements the team is currently working on so you can plan out when your institution is ready to transition. <br><br> **Presenter(s):** Victor Kinzer, Product Manager, Kuali <br><br> **Room:** Salon C | **How are you Blooming? Research Show and Tell** <br><br> Do you have an exciting solution, a complex approval workflow, a flowchart of which you're especially proud? What about a novel way you went about solving campus specific requirements? Join us in this casual show and tell session with a copy of your workflow, a virtual poster, or grab a marker and giant sticky note to show off your innovations! <br><br> **Facilitator:** Bess Jensen, Implementation Consultant, Kuali <br><br> **Room:** Tokyo / Vancouver | **Unlocking Kuali Catalog Magic: Dive Deep, Display & Delight!** <br><br> Dive deep into Catalog! Understand the dance between start dates and catalog activation dates, and get the scoop on the choicest fields in CM to make your content pop. We'll guide you through the myriad display options to best suit your audience's needs. Plus, we'll demystify the art of embedding your catalog on your website, be it through sleek dropdown menus or dedicated catalog pages. Join us to elevate your Kuali Catalog game and bring your content to life like never before! <br><br> **Presenter(s):** Vicky Kulig, Customer Support & Documentation Manager, Kuali <br><br> **Room:** Casablanca |

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| **2:30 PM – 3:15 PM** | **\* Cross-Track Session \* (Build/Student)**<br><br>**Unlocking the Efficiency of Creating Efficiency: Kuali Build's No-Code Role in Transforming Business Processes**<br><br>The University of California San Diego gathered high-volume Academic Affairs business offices to explore ideas to move service requests from email to a standardized ticketing system. Through this group exploration of future efficiencies, consultations, and a pilot project, we determined the final product achieved successful results. However, the timeline to achieve the final 'efficiency' product was unrealistic and unsustainable. Kuali Build was introduced and thus allowed a 3-6 month process to instead be completed in 3-6 days. Hear about how UC San Diego Academic Affairs uses Kuali Build for faster form creation, to un-silo processes with best practices, and allow for customer nuances. While we continue to develop our processes using Kuali Build in this manner, other aspects of the process are under active assessment for improvement. The session will conclude with Q&A and a brief roundtable discussion to hear about creative examples where others have partnered Kuali Build with other process-related systems to bolster abilities, value, or efficiency.<br><br>**Presenter(s):** Kevin Waldrop, Assistant Director, Center for Operational Excellence, UC San Diego; Terry Durkin, VP Customer Success, Kuali<br><br>**Room:** Salon B | **Upcoming Improvements to Contracts & Grants Billing**<br><br>A look at the changes coming soon to Contracts & Grants Billing (CGB) including improvements to configurations and tools to support future integration with Kuali Research.<br><br>**Presenter(s):** Heather Elyea, Product Manager, Kuali; Lesley Markesbery, Senior Engineering Manager, Kuali<br><br>**Room:** Melbourne | **Cybersecurity Tabletop Exercise (Part 2)**<br><br>Join us for a crucial cybersecurity tabletop exercise tailored for the higher education community. Dive deep into simulated cyber threats, develop incident response strategies, and fortify your institution's defense. Together, let's enhance our digital landscape's resilience and safeguard our academic assets. This session will take place in three parts, allowing time for the group to move through all the parts of the exercise.<br><br>**Presenter(s):** Eric Self, Account Executive, Kuali; Missy Krewson, Product Manager, Kuali<br><br>**Room:** Naples | **Getting the Most Out of Kuali Research: Tips and Tricks to Improve Efficiency.**<br><br>In this session, we'll share opportunities for improving efficiencies by using key features of the Kuali Research suite. Join us to learn how the University of Alabama, Huntsville has improved their processes. The focus will be on process improvements, efficiencies, etc., that can be achieved by using certain aspects of the suite, with examples.<br><br>**Presenters:** Scott Sandlin, Electronic Research Administration (eRA) Specialist, University of Alabama in Huntsville<br><br>**Room:** Salon D | **SCSU's Pilot Migration to Next-Gen Kuali Research**<br><br>In this discussion session, Southern Connecticut State University will talk about their experience as our pilot migration customer and first mover to our next-gen Kuali Research suite. They will share their approach to planning, business process analysis, configuration, data migration, and testing, as well as the outcomes they've achieved.<br><br>**Presenter(s):** Carol Jenkins. Associate Director, Post Award. Sponsored Programs & Research, Southern Connecticut State University Victor Kinzer, Research Product Manager Kuali<br><br>**Room:** Tokyo / Vancouver | **\* Cross-Track Session \* (Build/Student)**<br><br>**Unlocking the Efficiency of Creating Efficiency: Kuali Build's No-Code Role in Transforming Business Processes**<br><br>The University of California San Diego gathered high-volume Academic Affairs business offices to explore ideas to move service requests from email to a standardized ticketing system. Through this group exploration of future efficiencies, consultations, and a pilot project, we determined the final product achieved successful results. However, the timeline to achieve the final 'efficiency' product was unrealistic and unsustainable. Kuali Build was introduced and thus allowed a 3-6 month process to instead be completed in 3-6 days. Hear about how UC San Diego Academic Affairs uses Kuali Build for faster form creation, to un-silo processes with best practices, and allow for customer nuances. While we continue to develop our processes using Kuali Build in this manner, other aspects of the process are under active assessment for improvement. The session will conclude with Q&A and a brief roundtable discussion to hear about creative examples where others have partnered Kuali Build with other process-related systems to bolster abilities, value, or efficiency.<br><br>**Presenter(s):** Kevin Waldrop, Assistant Director, Center for Operational Excellence, UC San Diego; Terry Durkin, VP Customer Success, Kuali<br><br>**Room:** Salon B |

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| **3:15 PM – 3:30 PM** | Refreshment Break in the Centennial Ballroom Foyer | | | | | |
| **3:30 PM – 4:15 PM** | **Build Speedy Meet-Ups**<br><br>Modeled after the concept of speed dating, participants will have the opportunity to engage in timed one-on-one conversations with fellow attendees. Forge new connections, exchange ideas, and discover innovative approaches to enhance your workflow automation strategies. Don't miss out on this unique chance to build valuable relationships within the higher education community and advance your institution's efficiency through shared knowledge and collaboration.<br><br>**Facilitators:** Pauline Fetters, Customer Success Manager, Kuali<br><br>**Room:** Salon D | **Kuali Financials EST Meeting (invitation only)**<br><br>This meeting of Kuali Financials partner schools is by invitation only.<br><br>**Room:** Melbourne | **Cybersecurity Tabletop Exercise (Part 3)**<br><br>Join us for a crucial cybersecurity tabletop exercise tailored for the higher education community. Dive deep into simulated cyber threats, develop incident response strategies, and fortify your institution's defense. Together, let's enhance our digital landscape's resilience and safeguard our academic assets. This session will take place in three parts, allowing time for the group to move through all the parts of the exercise.<br><br>**Presenter(s):** Eric Self, Account Executive, Kuali' Missy Krewson, Product Manager, Kuali<br><br>**Room:** Naples | **Moving from Word Documents and Back-Office Application to Kuali Protocols IBC**<br><br>Indiana University's IBCs implemented Kuali Protocols (KP) in October 2022. Prior to implementing KP protocol information was submitted via email on Word documents and minimal information was entered into a homegrown back-office web-based application. The implementation of a forward facing protocol submission system that incorporates committee functionality required changes to processes and allowed for enhanced collaboration within the committees and other related research offices. This presentation will go over the ways IU was able to leverage KP functionality to reduce "paper-pushing" by staff and researchers to focus on safety and compliance with NIH Guidelines.<br><br>**Presenter(s):** Stephanie Jones, Associate Director, Research Compliance, Indiana University<br><br>**Room:** Tokyo / Vancouver | **Tier 1 Support Structure at your Institution**<br><br>Have you wondered how best to create processes to help campus users with questions about Kuali Research? What tools are available? Who should triage questions? Regardless of your institution's size, join us to hear how you can create a support structure that provides a great experience for your campus users and allows you to measure success.<br><br>**Presenter(s):** Tim Stafford, University of Arizona; Jason DeFay, University of California, San Diego; Pam Tallarida, University of California, San Diego<br><br>**Room:** Salon C | **UGA's Use of Kuali Curriculum Management and Catalog for Institutional Policy Library Development**<br><br>Explore how the University of Georgia leveraged Kuali Curriculum Management and Catalog to create an institutional policy library. Learn practical insights, strategies, and lessons learned from UGA's experience in centralizing policy management, improving compliance, and streamlining governance. Discover how this approach can be used to enhance transparency, accountability, and effectiveness.<br><br>**Presenter(s):** Maggie C. Parker, Director, Office of Accreditation and Institutional Effectiveness, UGA<br><br>**Room:** Casablanca |
| **5:00 PM – 6:30 PM** | **Kuali Days 2024 Customer Appreciation Reception**<br>Centennial Ballroom Salon A and adjoining terrace | | | | | |

# Kuali Days 2024 | Tuesday, April 16, 2024

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| **7:30 AM – 8:30 AM** | Breakfast in Salon A<br>*We're setting aside space for you to dine with conference attendees with similar interests to connect. Signs on tables will indicate the topic being discussed.* | | | | | |
| **8:30 AM – 9:15 AM** | **General Session: Generations@Work: Leveraging Our Differences to Win in the Talent Economy**<br><br>Society is changing, demographics are shifting, and work as we've always known it is at an end. In this time of incredible transition, teamwork has taken a hit. In fact, many of our tried-and-true team building efforts are falling flat in this changing work environment -- at a time when the call for inclusion and collaboration is louder than ever. But there is a solution.<br><br>**Sarah Sladek** is the founder of one of the nation's first generational research companies, and a leading researcher of workforce cultures. For her book, Talent Generation, she spent several years researching the organizations realizing high employee engagement in addition to high profitability. In this presentation, Sarah will share her key findings, best practices, and unique generational insights. Learn more about the Talent Economy and what the future is likely to bring, as well as how to leverage differences and bring people together in a time of change. Presentation will include an action item individuals and teams can take back to begin implementing at work.<br>**Room:** Salon B | | | | | |
| **9:30 AM – 12:15 PM** | **Don't Forget to Visit the Kuali Design Lab!**<br><br>Drop into Kuali's Design Lab! Participate in user research with our designers and get a glimpse of future platform features that are in the design stage.<br>**Facilitators:** Kuali's UX Designers<br>**Room:** Barcelona | | | | | |
| **9:30 AM – 10:15 AM** | **\* Cross-Track Session \* (Build/Research)**<br><br>**Using Build for Research Administration**<br><br>Join us for a facilitated panel discussion with four schools using Kuali Build to solve problems in the research administration and compliance business areas. Customers will talk about apps they have created, problems they've solved, challenges they've encountered, and what they plan to create with Build in the future.<br><br>**Panelists:** Barbara Inderwiesche, Director, ERA, UC Irvine, Stephen Dowdy, Director of Research Information Systems & Integration, University of Maryland, College Park; Bradley Cohen, Senior Research IT Software Specialist, University of Massachusetts, Amherst<br><br>**Room:** Salon B | **Path to SaaS: Planning & Evaluation with University of Hawaii**<br><br>Join us for a look into how University of Hawaii partnered with Kuali to take a new approach to begin preparing for their move to SaaS.<br><br>**Presenter(s):** Tammy Vandevender, Director of Fiscal Services Office, University of Hawaii; Terry Durkin, VP of Customer Success, Kuali<br><br>**Room:** Melbourne | **Copy & Paste: A Simple Way To Add Critical Functions**<br><br>Completing BCPs to include all the Critical Functions can be daunting. We, Sac State Risk Management, reviewed the BCPs in our Kuali Ready system and copied the Critical Functions that other departments have entered and created a catalogue of them. We used AI to fine tune the entries to make a document for our departments to Copy & Past the Critical Functions to their BCPs<br><br>**Presenter:** Don Nahhas, Software and Data Analyst for the Risk Management Department, CSU Sacramento<br><br>**Room:** Naples | **\* Cross-Track Session \* (Build/Research)**<br><br>**Using Build for Research Administration**<br><br>Join us for a facilitated panel discussion with four schools using Kuali Build to solve problems in the research administration and compliance business areas. Customers will talk about apps they have created, problems they've solved, challenges they've encountered, and what they plan to create with Build in the future.<br><br>**Panelists:** Barbara Inderwiesche, Director, ERA, UC Irvine, Stephen Dowdy, Director of Research Information Systems & Integration, University of Maryland, College Park; Bradley Cohen, Senior Research IT Software Specialist, University of Massachusetts, Amherst<br><br>**Room:** Salon B | **Birds of a Feather: Using the Subawards and Negotiations Modules**<br><br>Join us for an informal round-table discussion with your peers to learn how the Subawards and Negotiations Modules can help you improve your processes. Share how you use these modules at your institution and bring your questions.<br><br>**Facilitator:** Amanda Sidoti, Solution Engineer, Kuali<br><br>**Room:** Salon D | **Tier 1 Support Structure at your Institution**<br><br>Have you wondered how best to create processes to help campus users with questions about Kuali Curriculum Management & Catalog? What tools are available? Who should triage questions? Regardless of your institution's size, join us to hear how you can create a support structure that provides a great experience for your campus users and allows you to measure success.<br><br>**Presenter(s):** Vicky Kulig, Customer Support & Documentation Manager, Kuali<br><br>**Room:** Casablanca |

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| **10:15 AM – 10:30 AM** | Refreshment Break in the Centennial Ballroom Foyer | | | | | |
| **10:30 AM – 11:15 AM** | **Customers Share: Build Use Cases on Campus**<br><br>In this session, Southern Illinois University, Edwardsville, University of Connecticut and California State University, Bakersfield will discuss their use of Kuali Build to automate key processes on campus. They will share the impact Build has had on campus and discuss the most popular apps. Join us to hear their success stories!<br><br>**Presenters:** Christina McGuiggan, Office Administrator, Southern Illinois University, Edwardsville; Jason Ferguson, Business Analyst, Bakersfield, Jessica Henderson, Enterprise Applications Team Lead, University of Connecticut<br><br>**Room:** Salon D | **Improvements to Financials**<br><br>A look at the recent changes and changes coming soon to Financials including improvements to configurations, system to system integrations and new enhancements.<br><br>**Presenter(s):** Heather Elyea, Product Manager, Kuali; Lesley Markesbery, Senior Engineering Manager, Kuali<br><br>**Room:** Melbourne | **Spotlight on Workflow in Next-Gen Kuali Ready**<br><br>One of the most significant enhancements available in our fully redesigned Kuali Ready product is the powerful workflow designer. We'll dive deep into how the workflow designer allows you to build and test your processes, and even integrate with other systems.<br><br>**Presenter(s):** Tadd Giles, CTO, Kuali<br><br>**Room:** Naples | **What's New in Classic Sponsored Programs**<br><br>While we're focusing a lot of design and engineering effort on our Next-gen suite, we've found time to make some key enhancements to our Classic Research suite. Join us to hear about recent enhancements across the classic suite to make sure you're getting the most out of the products today.<br><br>**Presenter(s):** Jessica Peck, Director of Customer Support, Kuali<br><br>**Room:** Tokyo / Vancouver | **Managing Limited Submissions & Internal Competitions with Kuali Research**<br><br>We're excited to launch the newest product within the Kuali Research suite, Internal Competition Management. Set up competitions, assign reviewers, submit and manage applications, and track progress all within the same, user-friendly next-gen interface your researchers and staff will be familiar with. In this session, we'll demo the new product and talk about key features.<br><br>**Presenter(s):** Victor Kinzer, Product Manager, Kuali; Amanda Sidoti, Solution Engineer, Kuali<br><br>**Room:** Salon C | **Change Management at Southern New Hampshire University**<br><br>Join SNHU in a dynamic exploration of change management within the Kuali Curriculum Management platform. We'll take you from inception to execution, revealing our strategic planning, implementation, and communication techniques. Uncover the tools and systems that drive our success, ensuring a smooth journey from concept to completion. Discover how SNHU's expertise can empower your institution to thrive in the ever-changing world of higher education.<br><br>**Presenter(s):** Rebecca DuVall, Assistant Director, Systems and Special Projects, SNHU and Fred Curty, Assistant Director, System Analytics, SNHU<br><br>**Room:** Casablanca |
| **11:30 AM – 12:15 PM** | **\* Cross-Track Session \* (Build/Financials)**<br><br>**Kuali Financials & Kuali Build - Adding value to campus by leveraging your system of record.**<br><br>Learn how University of Connecticut leverages Kuali Financials data in Kuali Build to simplify and streamline multiple business critical processes.<br><br>**Presenter(s):** Brett Paulson, Manager Enterprise Financial Systems, University of Connecticut<br><br>**Room:** Salon B | **\* Cross-Track Session \* (Build/Financials)**<br><br>**Kuali Financials & Kuali Build - Adding value to campus by leveraging your system of record.**<br><br>Learn how University of Connecticut leverages Kuali Financials data in Kuali Build to simplify and streamline multiple business critical processes.<br><br>**Presenter(s):** Brett Paulson, Manager Enterprise Financial Systems, University of Connecticut<br><br>**Room:** Salon B | **Birds of a Feather: Business Continuity Planners Share**<br><br>Join your business continuity planning and risk management colleagues for a facilitated discussion on the challenges you face as part of your work. We'll crowdsource ideas for solving common challenges.<br><br>**Facilitator:** Missy Krewson, Product Manager, Kuali; Eric Self, Account Executive, Kuali<br><br>**Room:** Naples | **Integrating with Kuali Research for Beginners**<br><br>Not every school has technical support available to help integrate parts of the Kuali Research suite with other campus systems. Are you a non-technical Kuali Research user who has wondered what APIs are or how they work? Join us for a session that breaks down what these powerful points of connection are, how they work, and how you can begin to explore them, even if you don't have a technical background.<br><br>**Presenter(s):** Rachel Teki, Customer Support Specialist, Kuali<br><br>**Room:** Tokyo / Vancouver | **Birds of a Feather: Sandbox Cohort Meetup**<br><br>Are you part of one of our Next-Gen Sandbox Cohorts? This session is an informal meet-up to talk with your peers about your sandbox discovery.<br><br>**Facilitator:** Victor Kinzer, Product Manager, Kuali<br><br>**Room:** Salon D | **Validating the Calendar**<br><br>It is essential that the content that is published in the Academic Calendar is reviewed and validated by the Faculties. It is critical that the content reflects the requirements intended by Faculties which have been approved through collegial governance. See York University's journey on using a simple workflow to validate and sign-off for the published calendar.<br><br>**Presenter(s):** Farheen Zaidi, Assistant Director, Calendar & Curriculum, York University<br><br>**Room:** Casablanca |

*The printed program is subject to change. Current Version 040524*

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| **12:15 PM – 1:30 PM** | Lunch in Salon A | | | | | |
| **1:30 PM – 2:15 PM** | **\* Cross-Track Session \* (Build/Student)**<br><br>**Becoming Kualified: A Process Improvement Journey**<br><br>The University of Alabama in Huntsville (UAH) has recently begun using Build and Student to streamline processes across campus. Within Academic Affairs, affected processes include faculty hiring, graduate assistant hiring, thesis and dissertation signatures, representation of accelerated undergraduate/graduate programs, grade change forms, course report forms for ABET accreditation, curriculum changes, and a unified catalog. In Risk Management, using Kuali Build forms translates into software savings. In Human Resources, Kuali Build provides a flexible structure that accommodates varying levels of supervisory structure. Business Services is in the early stages of the journey, but the potential payoff is substantial. The journey has begun with no end in sight.<br><br>**Presenter(s):** Dr. Rhonda Kay Gaede, Interim Associate Provost for Undergraduate Education, Electrical & Computer Engineering Department, University of Alabama, Huntsville<br><br>**Room:** Salon B | **Enhancing User Experience through Effective Documentation and Support Processes**<br><br>Join us on a guide through Financials user documentation which features weekly release notes, details on new features and a sizable knowledge base.<br><br>**Presenter(s):** Heather Elyea, Product Manager, Kuali; Lesley Markesbery, Senior Engineering Manager, Kuali<br><br>**Room:** Melbourne | **Design Lab**<br><br>Drop in at our design lab to engage with our product and design team in user research. Provide feedback on features that are actively in design and contribute to the future of our products!<br><br>**Facilitators:** Rob Foster, Director of Design; Kate McGee, Senior UX Designer<br><br>**Room:** Naples | **Learn about Next-Gen Research: Protocols**<br><br>Join us for an overview of our redesigned IRB, IACUC, and IBC Protocols product. You'll learn about the functionality available in our first release, the enhancements that are on the horizon, and how you can test the waters in a sandbox to help plan for a transition when your institution is ready.<br><br>**Presenter(s):** Victor Kinzer, Product Manager, Kuali<br><br>**Room:** Tokyo/Vancouver | **Budget Creator**<br><br>In this session, we'll go deep into our new Budget Creator to show you how you can build detailed budgets quickly and easily. See examples of the tool in action, learn about upcoming enhancements, and ask your questions.<br><br>**Presenter(s):** Brian Jackman, Product Manager, Kuali; Amanda Sidoti, Solution Engineer, Kauli<br><br>**Room:** Salon D | **\* Cross-Track Session \* (Build/Student)**<br><br>**Becoming Kualified: A Process Improvement Journey**<br><br>The University of Alabama in Huntsville (UAH) has recently begun using Build and Student to streamline processes across campus. Within Academic Affairs, affected processes include faculty hiring, graduate assistant hiring, thesis and dissertation signatures, representation of accelerated undergraduate/graduate programs, grade change forms, course report forms for ABET accreditation, curriculum changes, and a unified catalog. In Risk Management, using Kuali Build forms translates into software savings. In Human Resources, Kuali Build provides a flexible structure that accommodates varying levels of supervisory structure. Business Services is in the early stages of the journey, but the potential payoff is substantial. The journey has begun with no end in sight.<br><br>**Presenter(s):** Dr. Rhonda Kay Gaede, Interim Associate Provost for Undergraduate Education, Electrical & Computer Engineering Department, University of Alabama, Huntsville<br><br>**Room:** Salon B |

| | Build | Financials | Ready | Research A | Research B | Student |
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| **1:30 PM - 3:15 PM** | Visit Kuali's Support Lab!<br><br>Chat with a Kuali customer success team member to get in-depth help or have complex questions answered.<br>**Facilitators:** Kuali's Customer Success Team<br>**Room:** Barcelona | | | | | |
| **2:30 PM – 3:15 PM** | **Looking ahead for Kuali Build**<br><br>Join us for a look ahead at the Kuali Build roadmap. What's in development now? What's on deck? And what candidates are we considering for the future. Share your thoughts and ideas, and learn what our team is planning.<br><br>**Presenter(s):** Hannah Martinez, Product Manager, Kuali & Tadd Giles, CTO, Kuali<br><br>**Room:** Salon D | **Ask the Experts !**<br><br>Have a burning question for our team? Drop in at our open office hours for a chat.<br><br>**Presenter(s):** Heather Elyea, Product Manager, Kuali; Lesley Markesbery, Senior Engineering Manager, Kuali; Kymber Taylor, Customer Success, Kuali<br><br>**Room:** Melbourne | **Ask the Experts!**<br><br>Do you have burning questions about how to accomplish something in Ready? Our team of Ready experts are here to answer your questions. Drop in with your list and we'll do our best to get you the answers you need.<br><br>**Presenter(s):** Janice Ruff, Customer Success Manager, Missy Krewson, Product Manager<br><br>**Room:** Naples | **Animal Management Focus Group**<br><br>We are exploring the idea of adding an Animal Management product to the Kuali Research suite, and we're eager for your feedback. Join us for a focus group to elicit requirements for Animal Management. Share your institution's needs and ideas, and give us feedback on some of the early concepts we're exploring.<br><br>**Presenters:** Victor Kinzer, Product Manager, Kuali; Amanda Sidoti, Solution Engineer, Kuali<br><br>**Room:** Salon C | **Ask the Experts!**<br><br>Do you have burning questions about how to accomplish something in Kuali Research? Our team of Research experts are here to answer your questions. Drop in with your list and we'll do our best to get you the answers you need.<br><br>**Presenter(s):** Customer Success Team<br><br>**Room:** Tokyo / Vancouver | **Kuali's APIs: Present and Future.**<br><br>Are you interested in learning how APIs can enhance your Curriculum Management system? Join us for an introduction to Kuali's API documentation, getting set up with an API key, and using both the current and future APIs for CRUD operations.<br><br>**Presenter(s):** Greg Mash, Customer Success Engineer, Kuali<br><br>**Room:** Casablanca |

# Thank You for Attending Kuali Days 2024!



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