Proposal Development (PD)
User Group Forum

August 14, 2014
• General Updates and Information
• Reminders and Best Practices
• Version 14 Upgrade Overview
• How System Issues are Resolved
• Demonstrations
Reminders and Best Practices

Best Practices
• Finding the right record to add your child record
• Adding sponsors and subaward institutions
• Emailing your reviewer for assistance

Reminders
• Deadline Dates
• Targeted/Planned Enrollment Table issue
• Don’t add “on the fly” Yale personnel
• The final proposal must be routed to GCA
## Version 14 Overview

<table>
<thead>
<tr>
<th>Date</th>
<th>Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Summer/Fall 2013</td>
<td>Intensive testing by project team</td>
</tr>
<tr>
<td>Winter 2013</td>
<td>GCA user acceptance testing</td>
</tr>
<tr>
<td>January-April 2014</td>
<td>Resolution of outstanding issues, change management plan completed, preparation for go live</td>
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<tr>
<td>April 24-28, 2014</td>
<td>Upgrade completed</td>
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<tr>
<td>May 2014</td>
<td>Issues identified not found in testing</td>
</tr>
<tr>
<td>June 2014</td>
<td>First bundle tested and migrated</td>
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<tr>
<td>July 2014</td>
<td>Second bundled tested and migrated</td>
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### Lessons Learned

- Department testing needed to reduce issues found after upgrade
- Variety of change management needed – what was most effective?
- More time needed to update reference materials and develop training
Resolving System Issues

1. Issue identified
2. Issue evaluated by functional/technical expert
3. Ticket submitted to vendor
4. Fix developed and tested by vendor
5. Yale evaluates fix to either apply to IRES or wait for future release
6. Patch is tested and migrated to production or fix is tested during next upgrade
7. Fix developed and tested by vendor
Thank you for attending User Group!

Have a Nice Day