

**RAS**

Research  
Administration  
Support

## Research Dashboards

OSP Roundtable

*Paul Davis*

*Business Analyst*

*Research Administration Information Services*

JUNE 18, 2015

## Today's Presentation

- Research Administration Projects
- RADashboards
- OSP Portal Retirement
- PIDashboard
- Expense Review
- Research Metrics Dashboard
- RADashboard Demo
- Questions

**RAS**  
RAS

Research Administration Support / Cornell University 2

## Data Management Projects

- Cornell research metrics dashboard — completed
- Research administrators dashboard — in Beta
- Expense review (Effort Cert) — in progress
- Learning Management System — In progress
- PI dashboard — in progress
- Integrated Research Administration system — evaluating vendors
- Research project projection system — not started

## RA Dashboard

- Focused on RA's needs
  - RAs heavily involved in designing dashboard
- Single place for administrator to go to answer top questions
- Integrate proposal, award, and finance reporting
- Easy to learn and use
- Provide common data-mart for PI Dashboard and ad-hoc reporting
- Formatted Current and Pending
  - ! Will be demonstrating this later in talk "

## OSP Portal Retirement

- Web Portal – Award and Proposal Lookup
- Web Portal - Forms
- Brio Reports
- Data-mart for Research Proposal and Award Data
  
- Serves: Research Administrators, OSP Staff, Faculty, Downstream systems

## OSP Portal Retirement

- Goal: RA Dashboard will be more useful and easier to use
- Goal: Functional Parity —> ~This Fall
  - Many functions already at parity
  - Answers will replace Brio Portal
  - Redeveloping forms
    - Project Change Request
    - Subcontract Request and Change Request
  - We're adding reports
- Plan to retire Web portal ~ Late 2015 or early 2016

# PI Dashboard

- Single place for faculty to go for research administration
- Addresses top questions easily
- Easy to use, no learning required
- Works on mobile devices
- Enables working with RAs
- No searching or filtering needed
- View and drill navigation



1000
Action List 3
Dashboard
Proposals & Awards
Personnel
Finances
Protocols & Training
Non-Financial Agreements
Inventions

## PI Dashboard

Some Ongoing Project ✕

FY14                      FY15                      FY16

Direct Only     Direct and Indirect

### Action List

Upcoming 30 Days and Past Due

Type	Due Date	ID	Status	
IACUC Protocol	05/31/2015	0382615	Expiring	Action
Technical Report	06/30/2015	8342935	Not Submitted	Action
Progress Report	06/30/2015	7119344	Not Submitted	Action
Technical Report	07/15/2015	2500923	Not Submitted	Action
Progress Report	07/15/2015	4081239	Not Submitted	Action

### Sponsored Funds

Title	Current Balance	End Date	Burn Rate	
Project	\$470,000	07/15/2015	Ⓢ	Action
Project	\$470,000	07/15/2015	Ⓢ	Action
Project	\$470,000	07/15/2015	Ⓢ	Action
Project	\$470,000	07/15/2015	Ⓢ	Action
Project	\$470,000	07/15/2015	Ⓢ	Action

RAS
Research Administration Support / Cornell University

The screenshot displays the CORNELL PI Dashboard with the following sections:

- Navigation:** RAS, PI Dashboard, Proposals and Awards, Personnel, Finances, What-If Analysis, Protocols and Training, Non-Financial Agreements, Inventions, Action List.
- Summary:** \$300,000 Awarded, \$150,000 Future Year, \$1,740,000 Proposed. Current Balance (All Funds): \$159,963. Projected Balance (All Funds): \$98,783.
- Action List - Upcoming 30 days and Past Due:**

Action Type	ID#	Due Date	Status	Details / Actions
IACUC Protocol	0382720	11-30-2014	Expiring	
Technical Report	U768417	12-31-2014	Not Submitted	
Progress Report	A588431	05-30-2014	Not Submitted	
Technical Report	A588431	05-30-2014	Not Submitted	
- Sponsored Funds:**

Title	Current Balance	Projected Balance	End Date	Details / Actions
A Platform for ...	\$47,453	\$800	07-31-15	
Developing Viral ...	(\$2,017)	(\$12,017)	10-31-24	
General Supportf..	\$24,000	\$19,500		
Computational M...	\$90,500	\$90,500		
- Protocols:**

Type	Protocol#	Status	Approved Date	Expiration Date	Details / Actions
IACUC	09060449	Expired	11/1/11	10/31/14	
IRB	0382720	Active	9/1/12	8/30/15	
IACUC	09060449	Expired	11/1/11	10/31/14	
- Personnel:**

Name	Employee Title	Comp	Term Date	Details / Actions	2014 Oct	2015 Jan	2015 Apr	2015 July
Smith, Steven	Acad Prof	\$100,000	-		30%			
Barrett, Kate	Fellow	\$50,000	-		30%			
Yog, Janet	PostDoc	\$50,000	06/30/15		30%			
Cunningham, GradSupp	GradSupp	\$50,000	-		30%			

## RA Dashboard Demo

- Getting started Video and Documentation
- Portfolio Reports (Filter, View, Drill)
  - Project and Account Search
  - Investigator Staffing
- Single purpose reports
  - Show all records you have access to
- Current and Pending Reports
  - NSF
  - NIH
  - USDA

[Obieprod.cit.cornell.edu](http://Obieprod.cit.cornell.edu)

# Questions

- Paul Davis
  - 607-254-5068
  - [prd9@cornell.edu](mailto:prd9@cornell.edu)
- RADashboards
  - [OBIEEProd.cit.cornell.edu](http://OBIEEProd.cit.cornell.edu)
  - [Confluence.cornell.edu/display/RAS/](http://Confluence.cornell.edu/display/RAS/)
  - [Rad-help@cornell.edu](mailto:Rad-help@cornell.edu)

We did not get to the following  
slides during the presentation

# Expense Review Mockups (Effort Cert Replacement)



Research Administration Support / Cornell University

Investigator Dashboard - Cost Review

← → ↻ http://dashboard.research.cornell.edu

[PI Dashboard](#) | [Proposals](#) | [Funding](#) | [What-If Analysis](#) | [Personnel](#) | [Protocols](#) | [Inventions](#) | [Expense Review](#)

Cost Review FAQ

## My Projects

**1** Select project

- E588372 Project Name with Long List of Words Included
- E588342 Primary Care Expansion Project
- E578654 Project Name in Conjunction with National Air and Space Museum Investigator

**2** Select accounts

- account number
- account number
- account number
- account number
- account number
- account number

**3** Select review period

2015

<input checked="" type="checkbox"/> Jan	<input checked="" type="checkbox"/> Feb	<input checked="" type="checkbox"/> March
<input checked="" type="checkbox"/> April	<input checked="" type="checkbox"/> May	<input checked="" type="checkbox"/> June
<input checked="" type="checkbox"/> July	<input checked="" type="checkbox"/> Aug	<input checked="" type="checkbox"/> Sept
<input type="checkbox"/> Oct	<input type="checkbox"/> Nov	<input type="checkbox"/> Dec

---

Project: Primary Care Expansion Project      Expiration Date: 11/13/2017      Current Balance: \$xxxx.xx      All changes saved

Account: E588342      Sub Account:

### Labor

Period	Name	Job Profile Name	Expense Type	Expense	Percent	CU Fiscal YTD	
September	John Smith	Researcher	Salary	2,678	100%	100%	<input type="checkbox"/> Edit note
	Mary Epps	Programmer	Salary	1,399	100%	100%	<input type="checkbox"/> Add note
	Markus Speck	Researcher	Salary	2,678	100%	100%	<input type="checkbox"/> Add note
October	Min Park	Science Writer	Salary	1,399	100%	100%	<input type="checkbox"/> Add note
	John Smith	Researcher	Salary	2,678	100%	100%	<input type="checkbox"/> Add note
	Dolores Parker-Jones	Admin Assist.	Salary	1,260	14%	14%	<input type="checkbox"/> Add note
	JaeYoon Hun	Lab Manager	Salary	1,656	86%	86%	<input type="checkbox"/> Add note
	Mary Epps	Programmer	Salary	1,399	100%	100%	<input type="checkbox"/> Add note
	Markus Speck	Researcher	Salary	2,678	100%	100%	<input type="checkbox"/> Add note
	Min Park	Science Writer	Salary	1,399	100%	100%	<input type="checkbox"/> Add note

Add Note

Investigator Dashboard - Cost Review

http://dashboard.research.cornell.edu

PI Dashboard | Proposals | Funding | What-If Analysis | Personnel | Protocols | Inventions | Expense Review

### Transactions

Trans Date	Vendor/Payee	GL Trans Desc	Reference Number	Business Purpose	Expense	
09/16/15		LASSP Stkrm 8-1-14 DEPT U76	5921509	Stockroom	0.74	<a href="#">Add note</a>
09/02/15		LINDA HATCH/EBAYS HALF.COM/4763	5854068	N/A	2.97	<a href="#">Add note</a>
09/09/15		Storch, Isaac Adapter reimbursement U76	5900812	RS-232 adapter for automated data taking Purchase with person funds due to urgent need on a weekend	14.03	<a href="#">Add note</a>
10/14/15		AMANDA CONOVER-/THE SHERIDAN PRESS/5652	6024620	N/A	1550.00	<a href="#">Add note</a>
10/03/15		LINDA HATCH/UPS*0000000012782374/4763	5939161	N/A	4.45	<a href="#">Add note</a>
09/18/15		LASSP LGNT 8-1-14 8-31-14 DEPT U76	5936907	Liquid Nitrogen	28.00	<a href="#">Add note</a>

[Add Note](#)

### Notes from previous reviews

Sent	Reference	Note	Disposition
07/09/15	John Smith EmpID 001 Salary July 2,678.22 August 2,678.22	Move this labor cost to account number 6789543. This person was working on that account starting July 2015 (prn)	This was moved to the new account. Thank you!
07/09/15	Markus Speck EmpID 009 Salary July 2,678.22 August 2,678.22	This should be 78%, not 100%. Please call me if you have questions about this (prn)	This was adjusted. Thank you!

### Notes for this review

Sent	Reference	Note	
10/09/14	John Smith EmpID 001 Salary July 2,678.22 August 2,678.22	July percentage should be 52%. (prn)	<a href="#">Edit note</a> <a href="#">Delete</a>

[Save and Return Later](#) [Approve with Changes Noted](#)

## Research Metrics

- Research Expenditure Trends
  - By College, Department, Sponsor, Discipline, Faculty, etc.
- Proposal Trends
  - Activity
  - Success
- Award Trends
  - Activity
  - Project Funding
- Available to Deans, Provosts, and President(s)

[Metrics.research.cornell.edu](http://Metrics.research.cornell.edu)