

RAS

Research
Administration
Support

Research Dashboards Update

OSP Roundtable

Paul Davis

Product Manager - Dashboards

Research Administration Information Services

SEPTEMBER 15, 2016

Today's Presentation

OSP Portal Future	
RA Dashboard	Overview Brio Portal Retirement New Features
PI Dashboard	Overview New Features
Research Admin IT Projects	IT Project Status Dashboards Roadmap
Questions Throughout	Getting Support for Dashboard Products

OSP Portal Retirement

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

RA Dashboard Goals

- Focused on RA's needs
- Single place for administrator to go to answer top questions
- Integrate proposal, award, and finance reporting
- Easy to learn and use
- Formatted Current and Pending
- Brio Replacement (for most Brio Portal users)

RA Dashboard Update

- Brio Retirement
 - Central Office Reports
 - “Ad Hoc” Reports
- Need for “Quick Search”
- Proposal Service Center Support
- Links to Forms

Most features rolling out Friday, Rest next month

RA Dashboard Demo

- Overview
 - Homepage and Available Reports
 - Project and Account Search
 - View, Filter Drill paradigm
 - Finances integration
- Quick Search
- Central Office Reports
 - Proposals submitted last year
 - Ad-Hoc Reports
- If These Reports Won't Do
 - OBIEE Analysis
 - Brio Fat Client

OBIEE Tips and Tricks

- Copy and Paste
- Filter using Table Prompts
- Sorting on Columns
- Moving Columns
- Hiding Columns
- Adding Columns

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

New Features

Notes	Share Information With Your Faculty Record Decisions
Account Details	Federally Appropriated Accounts Cost Share Accounts Non-Sponsored Accounts
Proposals	Outstanding proposal details and documents
Project Personnel	Answer questions about who was paid on project Lots more coming
More Details	Person receiving order F&A rate, Account term date, Fund group info Key Personnel, Admin Contacts

PI Dashboard Demo

Navigation	Page Details Panel Drill
Projects	Project Documents AM Accounts “My Accounts” Personnel
Federally Appropriated Accounts	Show Budget, burn graph
Non-Research Accounts	Show starting balance, income, expenses, current balance
Transactions	Sort and filter Who received
Project Personnel	Just the beginning

Research IT Projects

- Cornell research metrics dashboard — Completed
- **Research administrators dashboard — Completed, Updated**
- **PI dashboard — Released, Updated monthly**
- **Brio Portal Retirement — Completed**
- **OSP Portal Retirement — Deferred Until RASS?**
- Learning Management Sys — Campus: Nov; Research: Mar-Apr
- Research Administration Support System — Negotiating Contract
- Research project projection system — Early Design Starting

Road Map – Short term

PI Dashboard	Personnel Projections
RA Dashboard	Links to Portal Forms Stabilization
Portal	Maintain

Road Map – Long term

EZRA	Replace with RASS Retire
PI Dashboard	Continue Developing
RA Dashboard	Fold into RASS & PI Dashboard Retire
Portal	Retire

Need Advisors

- Projection Design
- Usability Testers (Faculty/RA pairs useful)
- Anticipate up to a meeting a month
- Send an email to pidash@cornell.edu
- Describe how you currently do projections or which faculty tester you can bring to the table

Questions?

System	URL	Guidance	Support Email
Portal	portal.research.cornell.edu	Help Menu	radash@cornell.edu
RA Dashboard	radash.cornell.edu	guide.radash.cornell.edu	radash@cornell.edu
PI Dashboard	pidash.cornell.edu	guide.pidash.cornell.edu	pidash@cornell.edu

- Paul Davis
 - 607-254-5068
 - prd9@cornell.edu