

RAS

Research
Administration
Support

PI Dashboard

Office of the Vice Provost for
Research

Cathy Long

Associate Vice President for Research Administration

Paul Davis

Product Manager for the PI Dashboard

DECEMBER 21, 2015



Agenda

- PI dashboard background
- Purpose
- Roadmap
- Demonstration
- Action items
- Questions and Answers

OVPR Research Administration Support Initiatives B2008

Enhance Internal Operations

Service *2008*

- Improve service, quality, response time
- Apply risk-based decision-making
- Reduce burden
- Manage costs

Key Performance Indicators

Measurement *2008*

- Monitor, inform continual improvement
- Evaluate overall sponsored activity
- Assess progress and effectiveness of initiatives

Research Administration Support System (RASS)

System *2010*

- Assist/focus on campus
- Sponsored non-financial processes
- Streamline processes, reduce burden

Broad campus participation

RA Dashboards

Data *6/13*

- Assist/focus on RAs
- One place for financial and project data
- C&P reports
- Financial projections
- Replace local systems

RA Steering Committee

PI Dashboards

Data *1/14*

- Assist/focus on PIs
- One place for financial and project data
- Quickly answer “top 10” ?s
- “What-if” projections
- Other TBD by PIs

PI Steering Committee

Internal Communications

Information and support *8/14*

- Improve content, delivery, effectiveness, technology
- Easy to find/use
- Improve support, reduce burden

Faculty/RA Steering Committee

PI Dashboard Purpose

- Assist PIs specifically in managing projects
- One source, combine data across “functions”
- Quickly answer “top 10”
- “What if” and expense projections
- Address current issues
 - Browsers, admin silos, ease of use, purchasing/people detail



Additional Benefits

- Provide relief for staff to enable focus on other/new research support functions

To achieve excellence in research we need to have excellent staff in the colleges, departments and centers in numbers sufficient to provide our investigators with the support required to efficiently and successfully administer their sponsored research programs.

-Robert A. Buhrman, Senior Vice Provost for Research

Pressures

- Years of reductions in staff
- Ever growing regulatory requirements
- Fierce competition for limited dollars
- Critical need for staff to work with faculty and perform admin work necessary to conduct research

Easing Burden w/PI Dash

- Self service for many PI questions
- Automate some communications
- Automate and standardize projection function and replace shadow tools

Process

- Faculty needs (prelim)
- Benchmark
- Mock screens
- Faculty advisory committee
 - Detailed faculty requirements
 - Re-design screens
 - Decide build order
- Active mocks
- Faculty “usability” input
- Code, update, iterate
- Introduce to research admins and their faculty

Faculty Participation

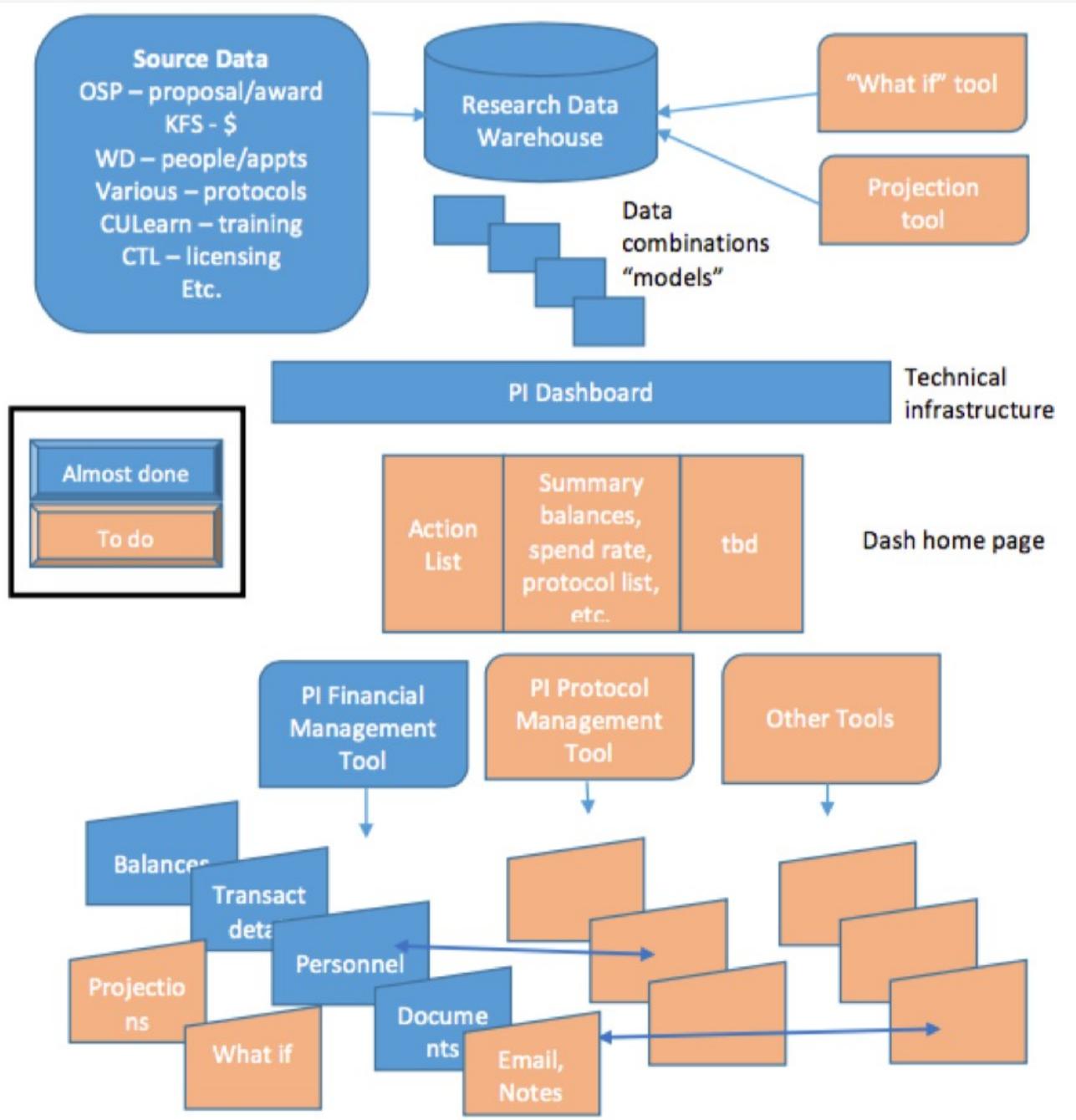
STEERING COMMITTEE

- **Paula Cohen**, Professor, Biomedical Sciences
- **John Lis**, Professor, Molecular Biology and Genetics
- **John March**, Associate Professor, Biological and Environmental Engineering
- **Kim O'Brien**, Professor, Nutritional Sciences
- **Lars Rudstam**, Professor, Natural Resources
- **Frank Wise**, Professor, Applied and Engineering Physics

Faculty Participation

USABILITY/CONTENT/NAVIGATION

- **Poul Peterson**, Assistant Professor, Chemistry and Chemical Biology
- **Anna Thalacker-Mercer**, Assistant Professor, Div. of Nutritional Sciences
- **Bettina Wagner**, Associate Professor, Population Medicine and Diagnostic Sciences
- **Itai Cohen**, Associate Professor, Physics
- **Chris Fromme**, Associate Professor, Molecular Biology & Genetics
- **Kyle Shen**, Assistant Professor, Physics
- FAC: **Paula Cohen, John Lis, John March**



Roadmap

Upcoming Releases

Release	Content	Timeframe
1	Financial Management Tool w/out labor – project financials and documents, sponsored and non-sponsored accounts, transactions	December 2015
1.1	Personnel (who is paid on which projects), cost-share accounts	Q1 2016
2	Enhanced pay transaction detail, e-mail w/details from selected row, more labor detail in transactions	End of Q2 2016

Roadmap

Later Releases

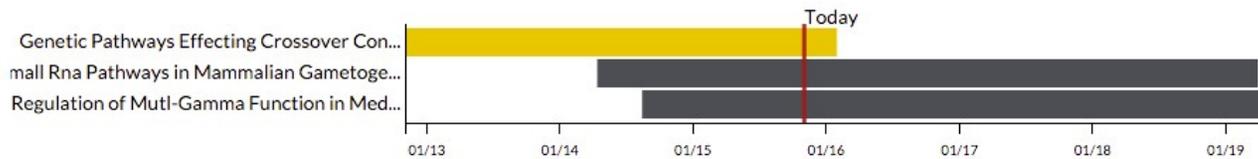
Release	Content	Timeframe
3	Simple financial projections	Q3 2016
4	Protocol, Proposal, Award Status, Home Page	Q1 2017
5	Robust Financial Projection Tool	TBD
6	Financial What-If Scenario Tool	TBD
7	Action List on homepage	TBD
8	Training	TBD
9	Inventions	TBD

PI Dashboard Demonstration

pidash.cornell.edu

Financial Overview

My Sponsored Funds



OSP# ^	Title	Sponsor	Current Budget	Current Balance	\$ Budget Expended: ■	⊙ Time Elapsed: ■
62357	Genetic Pathways Effecting Crossover Control and Meiotic Recombination in Mammals /	NIH Nigms	\$1,143,786	\$123,481	\$ 89%	⊙ 94%
68165	Small Rna Pathways in Mammalian Gametogenesis /	NIH Nichd	\$2,196,477	\$895,439	\$ 59%	⊙ 31%
71974	Regulation of Mutl-Gamma Function in Mediating Crossing Over in Mammalian Meiosis /	NIH Nichd	\$623,509	\$118,968	\$ 81%	⊙ 26%

Non-Sponsored Funds

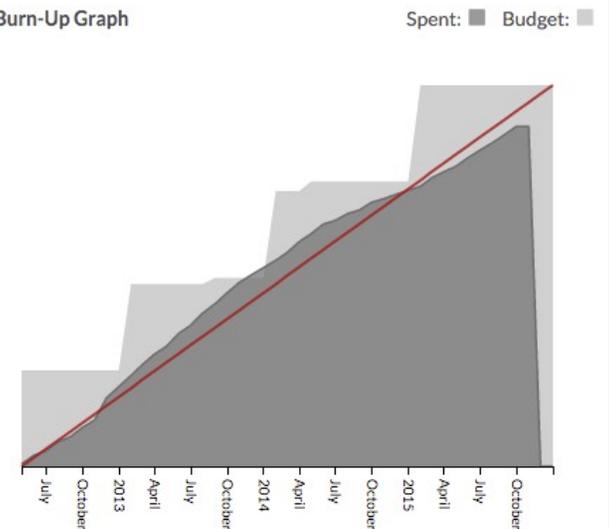
Account Number ^	Account Name	Cash Balance
4353307	Cohen - Faculty Activity /	\$-2,005.09 /
4353383	Cohen - Teaching Experience Support /	\$6,025.00 /
4353414	Rna Sequencing /	\$8,219.53 /
4353416	Subsidy - Rna Sequencing /	\$10,193.48 /

Project Details: Genetic Pathways Effecting Crossover Control and Meiotic Recombination in Mammals

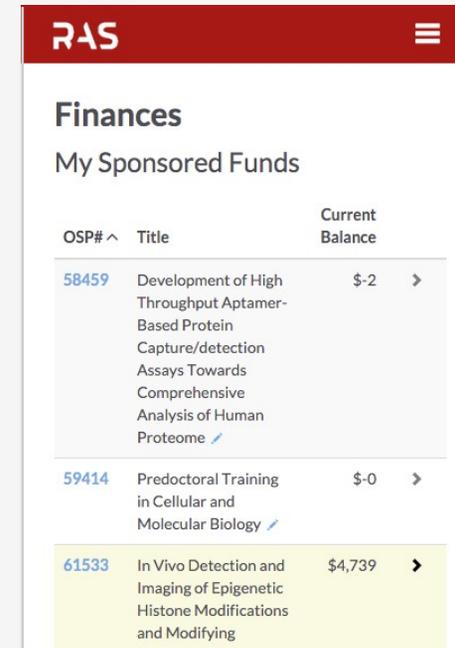
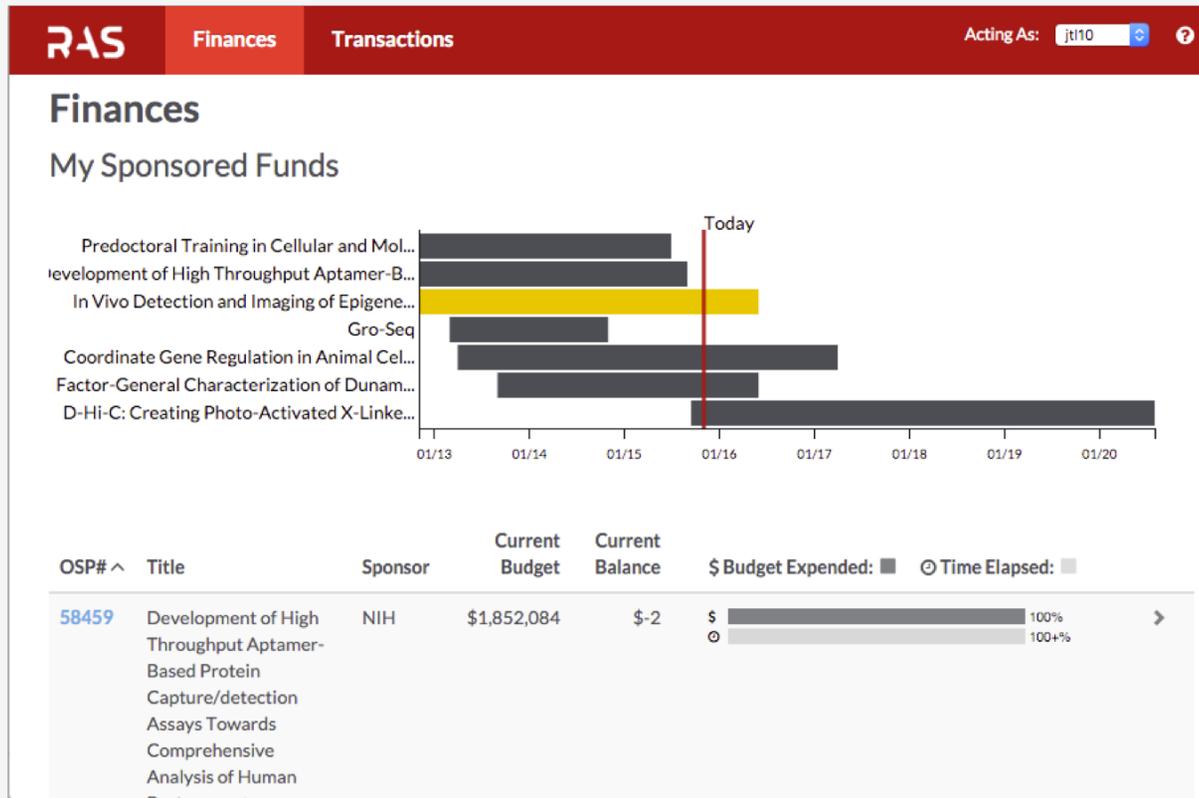
Project ID:
62357

Sponsor:
NATL INST OF GENERAL MEDICAL SCIENCES, NIH

Burn-Up Graph



Works on Tablet & Phone



Project – Financial Detail

Finances

In Vivo Detection and Imaging of Epigenetic Histone Modifications and Modifying Enzymes Using Multivalent Rna Aptamers

[Return](#)

[Overview](#)

Finances Balance: \$61,855

My Accounts

Accounts Included in Summary

CG #	Category	Current Budget	Current Expenses	Current Balance
1	Salary & Wages	\$127,901	\$297,834	\$-169,933
2	Compensation, Graduate & Sabbatical	\$0	\$31,336	\$-31,336
3	Employee Benefits	\$-1,739	\$111,682	\$-113,421
4	Capital Equip & Fabrication in Progress	\$23,973	\$734	\$23,239
5	Travel - Domestic	\$4,094	\$5,183	\$-1,089
6	Travel - Foreign	\$0	\$1,528	\$-1,528
7	Materials & Supplies	\$37,794	\$122,476	\$-84,682
8	Services	\$0	\$22,929	\$-22,929
9	Other Direct Expenses	\$494,068	\$3,826	\$490,241
10	Indirect Expenses	\$221,523	\$305,345	\$-83,822
Subtotal:		\$907,613	\$902,874	\$4,739

Other Accounts and Subaccounts

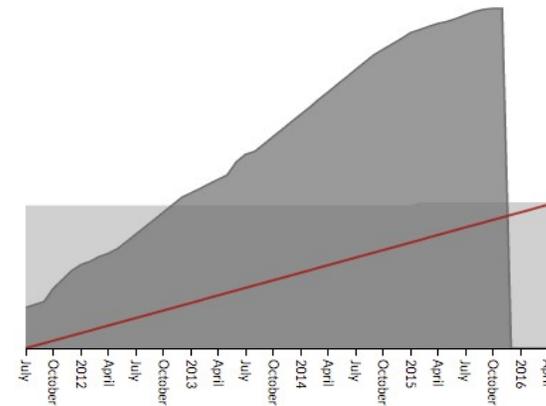
Account Number	Account Name	Account Manager	Current Budget	Current Expenses	Current Balance
E888331	NIH 61533 Zipfel Sub to Lis	Zipfel, Warren R.	\$418,076	\$419,640	\$-1,564

CGCat Summary

CG Cat:
Salary & Wages

Burn-Up Graph

Spent: Budget:



Transactions

Transactions

Search for...

Post Date ▼	Project	Account	C&G Category	Object Code Name	Transaction Description	Transaction Amount
90 Days ▼	All ▼	All ▼	All ▼	All ▼		
10/29/2015	71974	4358480	Materials & Supplies	Supplies - Lab/Project	VWR International LLC	\$57.52 >
10/29/2015	68165	4358421	Materials & Supplies	Supplies - Lab/Project	VWR International LLC	\$57.52 >
10/29/2015		4353307	Materials & Supplies	Supplies - Lab/Project	VWR International LLC	-\$172.55 >
10/29/2015		4353307	Materials & Supplies	Supplies - Lab/Project	VWR International LLC	\$172.55 >
10/29/2015	71974	4358480	Materials & Supplies	Supplies - Lab/Project	Krackeler Scientific Inc	\$19.18 >
10/29/2015	68165	4358421	Materials & Supplies	Supplies - Lab/Project	Krackeler Scientific Inc	\$19.18 >
10/29/2015	62357	4358332	Materials & Supplies	Supplies - Lab/Project	Krackeler Scientific Inc	\$19.17 <
10/29/2015		4353307	Materials & Supplies	Supplies - Lab/Project	Krackeler Scientific Inc	\$57.53 >
10/29/2015		4353307	Materials & Supplies	Supplies - Lab/Project	Krackeler Scientific Inc	-\$57.53 >
10/29/2015	71974	4358480	Materials & Supplies	Supplies - Lab/Project	PETER BORST /PROMEGACORP. *PROMEG/0668	\$135.00 >

Transaction Details: 47622594

CG Category:

Materials & Supplies

eDoc Number:

10830422

Purchased Items:

Item	Qty	Unit Price	Line Total	This Account
GEYFTS BALANCED SALT SOLUTIO	1.0	\$45.53	\$45.53	\$15.17
Shipping		\$12.00	\$12.00	\$4.00
			\$57.53	\$19.17

PI Dashboard Demonstration

End Demo

What Content Do Faculty See

- **Awards**

- All Pending or Active Awards where they are PI or AM on any project account
- All project documents for those projects

- **Account Summaries**

- All open accounts where they are AM or PI
- Any closed accounts for the projects above where they are AM or PI
- A special “My Accounts” summary for the project accounts they choose to group together

- **Transactions**

- All transactions in the last 90 days for all accounts where they are account manager
- Labor detail for labor transactions
- Purchase detail for most eShop purchases

What Content Do RA's See

- **Accounts and Transactions**
 - You will see accounts for which you are AM
 - You will see transactions for those accounts including labor and eShop purchased items
- **Act As**
 - You can “Act-As” privileges are the same as in the Accounting Dashboards
 - You will see exactly what your faculty see, including labor transactions
 - Any changes you make to “My Accounts” or Nicknames will be there for the faculty member to see as well
- **Access is a *subset* of the accounting dashboards**

Personnel – List (early mockup)

CORNELL PI Dashboard

http://www.url.com

Google

RAS | Proposals and Awards | Personnel | Non-Financial Agreements | Action List

Personnel

+ Add New Training Detail

Name	Employee Title	Compensation	Fringe Rate	Term Date	Details / Actions	2014	2015
						Oct	Jan
<u>Smith, Steven</u>	Acad Prof	\$100,000	36%	-	A Platform for the Design... 50% Developing Viral Resistan... 20% Non-Sponsored Funds 30%		Apr
<u>Barrett, Kate</u>	Fellow	\$50,000	61.3%	-	Developing Viral Resistan... 20% Non-Sponsored Funds 80%		July
<u>Vogt, Janet</u>	PostDoc	\$50,000	36%	06/30/15	A Platform for the Design... 50% Developing Viral Resistan... 50%		
<u>Cunningham, Joe</u>	GradSupp	\$50,000	0%	-	A Platform for the Design... 100%		
<u>Sethi, Sunny</u>	Student	\$25,000					
<u>Hoffman, Phil</u>	Non-Cornell	\$150,000	NA	-			

25% Direct Charge
25% Cost Share

Email

Personnel – Individual (early mockup)

CORNELL PI Dashboard

http://www.url.com
Google

RAS
D
Proposals and Awards
Personnel
Non-Financial Agreements
Action List

Personnel
SMITH, STEVEN

A Platform for the Design... 50%

Developing Viral Resistan... 20%

Non-Sponsored Funds 30%

2014 2015

Oct Nov Dec Jan Feb Mar Apr May June July Aug Sept

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Financials ▲
⏪
⏩

Title	Committed Effort	Effort To-Date	Expenses						Commitments		Projections		
			May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar
A Platform for the Design...	TBD	TBD	3,354	3,354	3,354	3,354	3,354	3,354	3,354	3,354	3,354	3,354	3,354
Developing Viral Resistan...	TBD	TBD	1,342	1,342	1,342	1,342	1,342	1,342	1,342	1,342	1,342		
General Support for the J...	-	-	2,013	2,013	2,013	2,013	2,013	2,013	2,013	2,013	2,013	2,013	2,013
TOTAL COMPENSATION	-	-	6,708	6,708	6,708	6,708	6,708	6,708	6,708	6,708	6,708	5,367	5,367

Protocols ▲
+

Type	Protocol #	Protocol Expiration Date	Training Completed?	Details / Actions
IACUC	09060449	10/31/14	Yes	<div style="border: 1px solid #ccc; padding: 5px; display: inline-block;"> Add Employee to New Protocol </div> <input type="checkbox"/> RCR Training <input type="checkbox"/> Training 2 <input type="checkbox"/> Training 3

Enhanced Pay Transaction Information

Transactions

Transaction Date	Project	Account	Category	Object Code	Transaction Description	Transaction Amount	Flags
90 Days	All	All	All	All			All
11/12/2015	63016	432151	Salary Wages	Other Prof	Jane Smith: Move Post Doc Expenses to CCRM Adjust. to Oct 2015 pay	\$ 3,852.86	>
10/31/2015	12345	345444	Salary Wages	Other Prof	Jane Smith, Dist 30%	\$1,155.92	✉ 📄 >
10/31/2015	63016	432151	Salary Wages	Other Prof	Jane Smith, Dist 57%	\$2,196.94	📄 >
10/15/2015	12345	345444	Salary Wages	Other Prof	Jane Smith, Dist 30%	\$1,155.92	>
10/15/2015	63016	432151	Salary Wages	Other Prof	Jane Smith, Dist 57%	\$2,196.94	✉ >
9/17/2015	63016	432151	Services	Services - Copy & Printing	01-CLMX20150331: Maximo Bill - April...	\$500.00	✓ >

Sum of displayed transactions: **\$4,801.07**

Transaction Details: 49343000

Overview [E-mail and Notes](#)

Employee:
Jane Smith - Research Support Spec IV

YTD Funding as of 10/31/2015:



Pay Distribution as of 10/31/2015:

Project	Account	Pay Dist.%	YTD%	Pay Dist.\$
63016-ARPA	432151	57%	53%	\$2,196.94
12345-USDA	345444-2121-CS	30%	28%	\$1,155.92
Other Src	Other	13%	19%	\$500
Total		100%	100%	\$3,852.86

Roll Out Plan

- Early Invitations – Last 2 weeks
 - Research center directors and finance staff, and one academic department
 - Currently 61 users
- OSP Round Table – Today
- Work with colleges on rollout plans – next few weeks
- Invitations will be sent to faculty in waves – Jan-Feb
- You are welcome to share the PI Dashboard with your faculty as you meet with them

Action Items for You

- Correct “My Accounts” for each of your faculty
 - Act As each faculty member
 - Drill into each project that has more than one account
 - Edit account list to remove subcontracts and any accounts the faculty shouldn't spend money out of
- Add Nicknames as appropriate
- Load detailed budgets for projects
 - This requires a budget adjustment eDoc that is routed through SFS

Action Items for You

- Review account managers
- Review Act-As access
- Schedule meetings with your faculty
- Send us questions, feedback, suggestions, advice
 - pidash@cornell.edu or question menu in pidash.cornell.edu

Questions?



- PI Dashboard: pidash.cornell.edu
- Feature Tour Video: guide.pidash.cornell.edu/feature-tour
- Guide: guide.pidash.cornell.edu
- Question Mark menu in the dashboard
- Email: pidash@cornell.edu
- Paul Davis (Product Manager)
 - 254-5068
 - pidash@cornell.edu