Research Dashboards Update

OSP Roundtable

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Research Administration Information Services

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## Today’s Presentation

| OSP Portal Future | Overview
| Brio Portal Retirement
| New Features |
| RA Dashboard | Overview
| 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

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

<table>
<thead>
<tr>
<th>PI Dashboard</th>
<th>Personnel Projections</th>
</tr>
</thead>
<tbody>
<tr>
<td>RA Dashboard</td>
<td>Links to Portal Forms Stabilization</td>
</tr>
<tr>
<td>Portal</td>
<td>Maintain</td>
</tr>
</tbody>
</table>
## Road Map – Long term

<table>
<thead>
<tr>
<th>Component</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>EZRA</td>
<td>Replace with RASS Retire</td>
</tr>
<tr>
<td>PI Dashboard</td>
<td>Continue Developing</td>
</tr>
<tr>
<td>RA Dashboard</td>
<td>Fold into RASS &amp; PI Dashboard Retire</td>
</tr>
<tr>
<td>Portal</td>
<td>Retire</td>
</tr>
</tbody>
</table>
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?

<table>
<thead>
<tr>
<th>System</th>
<th>URL</th>
<th>Guidance</th>
<th>Support Email</th>
</tr>
</thead>
<tbody>
<tr>
<td>Portal</td>
<td>portal.research.cornell.edu</td>
<td>Help Menu</td>
<td><a href="mailto:radash@cornell.edu">radash@cornell.edu</a></td>
</tr>
<tr>
<td>RA Dashboard</td>
<td>radash.cornell.edu</td>
<td>guide.radash.cornell.edu</td>
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