



Research Administration Process Improvement & Deployment

PI Portal
Fund Status Tool Demo

Agenda

- Introductions
- Overview / Background
- Roll-Out Strategy
- Data Source
- Live Demonstration
- Known Issues
- Future Enhancements
- Questions/Feedback

Introductions

Overview / Background

- RAPID background and project structure
- Project initiated and championed by the RAPID Faculty Advisory Committee
- PI Portal provides PIs with:
 - Web-based access to research funds
 - Near real-time access to financial information
- “Designed by PIs for PIs”
- Not intended to replace existing systems and tools designed for use by research administrators and fund managers
 - Continue to consult with fund managers about transactions in process

Project Team Members

Faculty Advisory Committee

- Andrew Leuchter *Psychr & Biobehavioral Science*
- Bruce Dunn *Material Science & Engineering*
- Tyrone Cannon *Psych-Clinic*
- David Eisenberg *Genomics & Proteomics*
- Todd Franke *School of Public Affairs*
- Robin Garrell *Chem & Biochem*
- Carol Mangione *Medicine – GIM & HSR*
- Alison Moore *Medicine - Geriatrics*
- Anne Pebley *Public & Community Health Sci.*
- Leonard Rome *School of Medicine*

ORA

- Marcia Smith
- Jackson Jeng
- Gloria Su
- Terry Wingo
- Wai Fok

Huron

- Nate Haines
- Jenna Lee

Limited Roll-Out (Oct – Dec 2010)

Formal Communication

Faculty Advisory Committee Meeting

Campus-wide announcement

Research Administrators Forum (RAF)

PI Portal "Road Shows"

Partner with FAC members/ "champions" for limited roll-out department outreach

Schedule demos for PIs in limited roll-out departments

Word-of-Mouth Adoption

Via PIs in limited roll-out departments

Via OCGA/EFM interaction with PIs

- Number of departments in limited roll-out: 42
- Potential number of PIs reached: 877 out of ~2,600 (33%)

PI Portal Roll-Out



Suggested Limited Roll-Out Departments

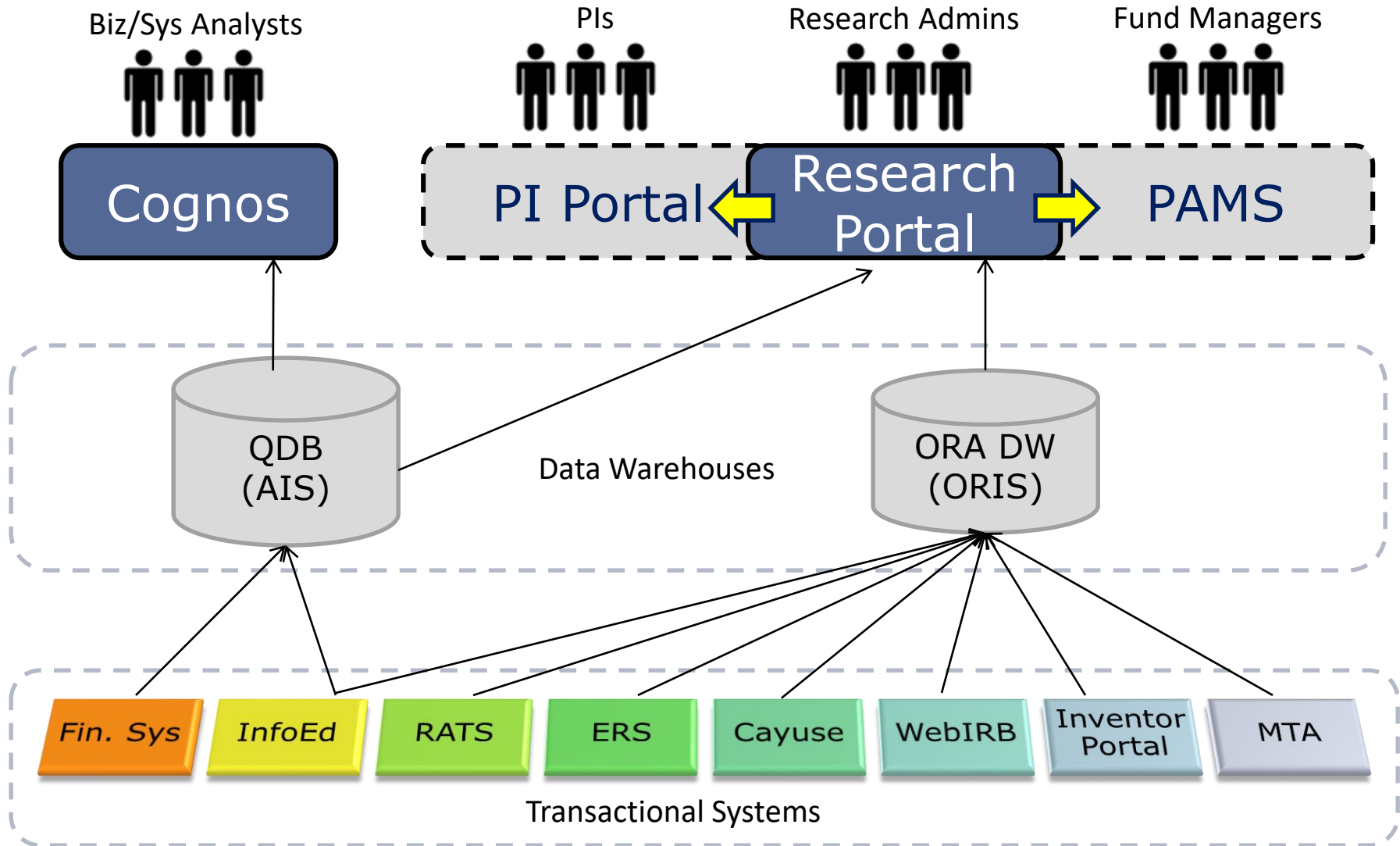
PI/Champion	Department(s)	PI Count
Tyrone Cannon	0875 – Psychology	64
Bruce Dunn	0190 – Materials Science & Engineering	24
James Economou	SubDiv 2225 – Surgery SubDiv 2228 – Jonsson Cancer Center	97
David Eisenberg	1445 – Biological Chemistry	23
Todd Franke	Org 1180 - School of Public Affairs Org 1120 – Education & Info. Studies	81
Richard Kaner	0980 – Chemistry and Biochemistry	66
Andrew Leuchter	1655 – Psychiatry 2000 – NPI	221
Alison Moore	1558 – Medicine – Geriatrics	22
Carol Mangione	1565 – Medicine – Administration	29
Anne Pebley	Org 2400 – School of Public Health	126
Leonard Rome	Div 2210 – Administration Div 2220 – Basic Science Departments	159

Scheduled Road Shows

Date	Department Meeting	PI Champion
11/4/2010	Education Faculty Meeting	Todd Franke/ Megan Franke
11/4/2010	Faculty Senate Academic Assembly	Andrew Leuchter
11/9/2010	Department of Medicine Executive Com.	Alison Moore/ Carol Mangione
12/3/2010	GIM Divisional Meeting	Carol Mangione
12/8/2010	Neurology Faculty Meeting	Jim Economou/ John Mazziotta
12/9/2010	Chem and Biochem Faculty Meeting	Robin Garrell

- QDB is the primary data source for:
 - Financial figures
 - Payroll and purchasing transaction details
 - Award demographic information
- Refreshed on a daily basis (every morning, after QDB update)
- Decentralized data entry
 - Fund managers
 - Payroll, purchasing and travel preparers

System Overview & Strategy



Live Demo

Known Issues

- Issue: PI's main account(s) may appear incorrectly under *Linked Accounts*
- Explanation/Resolution: Department Fund Manager/ General Accounting has not populated the "Managing Investigator" field in the financial system

My Funds

Award PI: **Sponsor:** NIH/NATIONAL INST OF CHILD HEALTH AND HUMAN DEVELO...
Sponsor Award No.: 5R01HD058514-03
Project Title: NEIGHBORHOOD AND FAMILY EFFECTS ON DISPARITIES IN ...
F&A Rate(s): 54.00 %

Fund No.: **Project Period:** 9/24/2008 - 7/31/2012
Budget Period: 9/24/2008 - 7/31/2011
Contract/Grant Contact: Kristin Lund x40608
EFM Contact: Becky Henriksen x48359

55.6 % 74.0 %

0% 20% 40% 60% 80% 100%

Back

Data from Inception to Date (as of 11/1/2010)

	Budget	Actual Spent (Month End Close 9/30/2010)	Actual Spent (Current Month)	Current Balance	Anticipated Expenses	Total Committed	Manual Adjustments	Projected Balance
Salaries & Wages	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00		\$0.00
Employee Benefits	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00		\$0.00
Supplies & Expenses	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00		\$0.00
Equipment	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00		\$0.00
Travel	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00		\$0.00
Subawards/Subcontracts	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00		\$0.00
Other Expenses	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00		\$0.00
Total Direct Costs	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Indirect Costs	\$0.00	\$0.00	\$0.00	\$0.00	N/A	\$0.00	N/A	\$0.00
Estimated Indirect Costs	N/A	N/A	N/A	N/A	\$0.00	\$0.00		\$0.00
My Account(s) Subtotal	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
PH-COM HLTH SCI-RES & SUPP/	\$1,245,842.00	\$635,699.28	\$56,639.96	\$553,502.76	\$216,358.86	\$908,698.10	N/A	\$337,143.90
Linked Account(s) Subtotal	\$1,245,842.00	\$635,699.28	\$56,639.96	\$553,502.76	\$216,358.86	\$908,698.10	N/A	\$337,143.90
MCA/STIP/Carry-Forward	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	N/A	\$0.00
Grand Total	\$1,245,842.00	\$635,699.28	\$56,639.96	\$553,502.76	\$216,358.86	\$908,698.10	\$0.00	\$337,143.90

Future Enhancements

A. Improved Financial Information

B. Proposal & Award Tracking

C. Reports

D. Usability

Questions & Feedback

Closing Remarks