Research Portal 2.0

This is a beta release of a web application that allows users to view submitted proposals and awards received. This is available from at the “Research Administration” pagelet of the CIS. Several features (selectable columns being one of the “favorite”) were demonstrated. BPAG members were encouraged to use it and give feedback to OSP. There is an email contact link in the footer of the application. Several questions/concerns were asked, including:

- What about “Co-PI’s”?
  - CO-PI’s are not currently capture in the system.
- Account (Project) Executives? (Those rare situations where the PI and the Account Executive are different).
  - We will take this back and see about incorporating this into the application.
• How far back is the data?
  o ~2006, the implementation of Grants Pre-Award.
• A concern was raised when data is updated as it may change historical reports. It was
discussed that this is the nature of this kind of data. There is not a true “cut-off”, similar to
financial cut-offs.
• There is data in eProposal that is also beneficial. It was mentioned that it makes sense to
get access to eProposal for Business Officers.
• In the future the actual Notice of Award (NOA) will be attached and accessible as part of
the application.
• Clarification around awards extensions. OSP and GCA will look at leveraging the Project
Comments to clarify these scenarios.

PCARD Statements

Click here for a communication that went out with the August PCARD statements. The U’s PCARD
program is one of the largest ones in the state. The Approval process is key to preventing misuse
and fraud. Some key areas of emphasis:

• Timely review of PCARD charges (recommend at least weekly)
• Documenting the Business Purpose
• Suggestion that in addition to the PCARD Office emailing the Card Holder and the
  Supervisor about questions or issues, that the Reallocator also be emailed.
• Concern that some merchants require and keep the original receipt when doing a return.
  What should the “original receipt” requirement be in these cases?

GCA Update

Dawn Atterbury, Manager of GCA, discussed the following:

• Reminder that when spending against a budget category that is normally restricted that the
  budget for that category must be set up. These categories are available on the budget
  setup.
• During the proposal process the funding agency often asks for information that is covered
  in the annual A-133 Audit “Letter and Report”
• The “120+” delinquent supplier list was demonstrated. This requires you CIS login to
  access.
• BPAG members were encouraged to use the “Change Liaison” feature of Project lookup.
  o PI’s and AE’s can only be changed through OSP
• BPAG members recommended that Project Lookup be improved by repeating the column
  headings (for long lists) and doing something similar to the dynamic column select feature
  of Research Portal 2.0.
**USHOP Update**

Perry Hull, USHOP Solutions Administrator, answered some questions regarding the U’s new eProcurement system (USHOP). An update regarding USHOP will be a standing agenda item for the next several BPAG meetings. A couple of questions that were raised:

- The ability to search by ADSC description
- Expanding the vendor options (e.g. more catalogs)

**Business Intelligence**

A high-level discussion regarding the role of BI tools was held. Specifically ideas for what type of reports could help staff make financial decisions. Some of the ideas:

- Project BBA monthly trends. Calendar year or Fiscal Year.
- Comprehensive PI reporting.
- Similar reports to the F&A reports provided by Mark Winter.
- Similar reports to the financial reports created by MBM
- Employee data, including Benefit Rates
- Income Accounting report detail
- Cylinder Demerge detail
- Summary of Proposals
  - Acceptance
- Cash Balance
- Over expended report
- Over Committed reports

**Open Discussion**

- EOR – Make more columns sortable
- Travel System
  - System timeout
  - “Student” button
  - Search by Traveler

Next BPAG Meeting—October 9, 2015