Research Portal

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(Finance, Facilities and Research Administration)
Agenda

• Why do we have a Research Portal?
• What is it?
• Where does the information come from?
• Who can see what?
• Tips and favorite features
• What are the future plans for the project?
Background

- Information stored in many systems with different login and security procedures
- High level of training and effort required to answer simple questions such as “what is my balance?”
- No “faculty-friendly” options
Solution

researchportal.northwestern.edu

• Modern web application using Amazon Web Services

• Developed with significant faculty and staff
Proposal Information

- Basic demographics from InfoEd available

- For full details, run the GM085
Proposal Information

- You can send a message to OSR requesting that a proposal be marked Unfunded
Award Information

- Data comes from NUFinancials
- Default view is high-level summary
Award Information

- Project page contains further detail

<table>
<thead>
<tr>
<th>Category</th>
<th>Budget</th>
<th>Actual Expenses</th>
<th>Encumbered Expenses</th>
<th>Projected Expenses</th>
<th>Balance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Direct Cost Total</td>
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<td>$ 164,717.55</td>
<td>$ 0.00</td>
<td>$ 0.00</td>
<td>$ 69,687.45</td>
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### Award Information

- **Drillable transaction detail**

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<thead>
<tr>
<th>Transaction Date</th>
<th>Account Description</th>
<th>Transaction Description</th>
<th>Transaction Type</th>
<th>Amount</th>
<th>Reference #</th>
</tr>
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<tbody>
<tr>
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<td>76777 Domestic Travel-Mtg&amp; Conf Fees</td>
<td>Spring 2017 Meeting</td>
<td>Expense Report</td>
<td>$358.50</td>
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<td>SFB April 2017</td>
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</table>

- **Non-Sponsored contains similar info**
Protocol Information

• Approved animal (IACUC) and human subjects (IRB) protocol numbers and demographic information

• Open security – any user can see any protocol information
Administrator Security: Sponsored Funding

- Anyone with Cognos research report access can see any proposal or sponsored project in the Portal
- Helpful for managing faculty with projects in multiple departments
- Salary detail is restricted to those with InfoEd access
Administrator Security: Non-Sponsored Funding

• Research Portal security is based on Cognos/NUFinancials Row Level Security
• Salary detail is limited to those with Cognos salary detail access
Security: Faculty

- Investigators (faculty) can see:
  - All sponsored projects where they are an investigator (any role)
  - All non-sponsored projects where they are the project manager and have NUFinancials security access
  - Salary detail on sponsored projects where they are PI or Subproject PI
  - Salary detail on non-sponsored projects they can see in the portal if they have the Cognos salary access role
General Cool Features

- Searching

```plaintext
<table>
<thead>
<tr>
<th>Date</th>
<th>Account Description</th>
<th>Transaction Description</th>
<th>Transaction Type</th>
<th>Amount</th>
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General Cool Features

- Sorting

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<tr>
<td>Apr 3, 2015</td>
<td>73475 Lab Supplies and Hardware</td>
<td>ULINE INC-10000</td>
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<tr>
<td>Apr 8, 2015</td>
<td>73475 Lab Supplies and Hardware</td>
<td>MCMASTI-10000</td>
</tr>
</tbody>
</table>
General Cool Features

• Transaction download

• Feedback button
Future Development

• More non-financial information
• More transparency into sponsored life cycle
• Ability to identify and process pending action items
• Continuing opportunity for staff to serve on focus groups
For More Information

www.it.northwestern.edu/supportcenter/
Questions?