Northwestern

URIC Administrative Meeting April 20, 2021

Agenda April 20, 2021

TIME	ΤΟΡΙϹ	PRESENTER
9:00 – 9:10	Introduction & Overview	Joe Boes
9:10 – 9:30	NU Scholars: URIC Membership Smartsheet: Functional Introduction	Nick Angeloni
9:30 – 9:45	URIC Annual Reports: Overview and Submission process	Joe Boes
9:45 – 10:00	HR updates	Beth Abbott

Introduction & Overview

- Today's Agenda
- Conversations with the President
 - Return to campus (university; updating local plans)
 - Merit pools (3% each for each of next 2 fiscal years)
 - Staff Engagement Survey (repeating calendar 2022)
- Sponsored Research
 - Other Support documentation for NIH
 - RPPR Submission and Award Management team
- VPR Sign-off (proposal & non-proposal)
 - Contracts flows being updated, can submit contract via Smartsheet, or work through Alexandra still

Northwestern Scholars URIC Membership

Nick Angeloni

NU Scholars Update

- Northwestern Scholars is the university's research networking and profiling system
 - <u>http://scholars.northwestern.edu/</u>
- URIC membership is now available on individual faculty profiles as well as the URIC organization page in Scholars
- Benefits:
 - Gives URIC membership data a home, simplifies annual report
 - Will allow for improved reporting in backend of Scholars (more on this soon)

Smartsheet Functional Introduction

Nick Angeloni

Today's Agenda

- What is Smartsheet?
- How can Smartsheet help with collaboration and reduce time spent on data collection and management?
- How is Smartsheet being used to improve processes in URICA and OR?
- What are the differences between free and licensed accounts?

What is Smartsheet?

• Web-based spreadsheet application for collaborative management of projects



- Interface is similar to Microsoft Excel, but with more advanced features for collaboration
- License needed to create new sheets, free accounts can edit and collaborate
- Northwestern login at <u>http://smartsheet.northwestern.edu</u>

Key Advantages vs. Excel

File attachments and links can be added to individual rows or entire sheet



Sharing in Smartsheet



Invite Collaborators	Permissions ()
JB Joseph Boes ×	Editor - can share
nvite Details	Admin Editor - can share
Subject Line	Editor - cannot share Viewer
Nicholas Angeloni invited you to edit the New Sheet sheet	
Personal message (optional)	
✓ Notify people ☐ Cc myself	

- Can share to anyone with a Smartsheet account, at Northwestern or outside
- Collaborators do not need a license, but are restricted in types of edits
- Can give editor privileges, or view only
- Publishing is also possible to share on websites or via a link

Reports & Dashboards



<u>Reports</u> allow you to aggregate data from multiple sheets and/or summarize data from multiple sheets – no copy and paste required, changes made to data are made everywhere

\$ License needed to create reports, can be shared to free accounts to edit

Employee Resource Portal (View Only) ✓ smartsheet Report Abuse ? **MBF**CORP **Project Management Dashboard** MBFCORP Overview Project Start Date Start Date: 03/05/18 Duration: 310d % Complete: 159 Submit New Projects Key Project Links Projects by Stage Project ID Project Plan Ξ Project Name Project Milestone Project Stage e Total Economi Clien Sales Re

Dashboards allow you to create highly customizable visualizations, graphs, and summaries using your data

Smartsheet can also be connected to other tools like Tableau

\$ License needed to create dashboards, can be shared/published to view by free accounts or those without accounts

Dashboard Widgets



Learning curve is less steep than Tableau or Cognos - easier entry into building reports and analytics

Smartsheet Forms

Northwestern | SMARTSHEET

VPR Signature Request Form for Proposal Related Materials

To request a signature from the Vice President for Research (VPR), please fill out the information below. This form is only for VPR signature requests related to proposals (letters of support, cost share, cover letters, etc).

For non-proposal related materials requiring VPR review and signature, please use this form: <u>ht</u> <u>tps://app.smartsheet.com/b/form/371605ff862d4d75851cd24168835bda</u>

Materials requiring the signature of other individuals such as school deans should be routed per their instructions.

Note that OSR guidance states that all letters involving cost share must be received at least one week before the proposal deadline. For all other letters, at least 2 business days lead time are required to adequately review and process requests. Late requests could be a challenge to address.

For questions or concerns, please contact Nick Angeloni, Director of the Office for Research Strategic Planning and Coordination, at n-angeloni@northwestern.edu.

Are these materials research proposal related and do you require the signature of the Vice President for Research, Milan Mrksich? \star

Due Date *

Yes

Cost Share/Institutional Support * Does this request involve cost share or institutional support, including cash, in kind, or other resource committment?

.

Select

Sponsored Project Number If available, should correspond to the InfoEd SP number

34

Data and attachments from form are automatically imported into Smartsheet

Additional columns can be included on Smartsheet to help track status, add additional info, etc.

Form is public, Smartsheet private

\$ License needed to create forms, anyone can use forms or view data

?	achments	Att	Page	Link to FOA/RFA/etc.	Proposal Title	PI Name	Sponsored Project Number	Date Returned	Status	Due Date	Date Received	
	Sheet All	Row	-									0
Sort by Dat	Actions *											0
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ttach Files to Sheet	4											0

Smartsheet Workflows

Trigger: + When rows are added •	
When Any field • changes	
Run workflow: When triggered	
Y Add a condition to filter rows	
÷	
♀ Alert someone	:
+1 Send to specific people *	
Nicholas Angeloni Fruma Yehiely	
☑ VPR Signature Request Received	
A VPR signature request has been received. Details are listed below.	
Includes sheet links, 8 fields	

- Edits or additions to sheet can trigger programmed events
- Can cut down on the amount of email and follow-up needed
- Workflows can trigger simple email alerts as well as requests for approval or updates
- License needed to set up workflows though free users can be included in a workflow

Smartsheet Licensing

- Current license cost <u>\$349 per year per user</u>
 - Group licenses are not currently available
 - Northwestern admin is Joseph Kurtin

Feature	Licensed	Free
View sheets/reports/dashboards		\sim
Edit sheets/reports	\sim	\sim
Add new rows of data		\sim
Add new columns, edit column properties	\sim	×
Create sheets/reports/dashboards	\sim	×
Edit dashboards	\sim	×
Create and modify forms		×
Create and modify workflows and automation		×
Create/edit shared filters and conditional formatting		×

Takeaways

- Smartsheet has additional features over Excel that allows for improved collaboration, documentation, and reporting of data
- Forms, automation, and linkages in Smartsheet can improve data intake process, streamline workflow, and cut down on errors
- URICA and OR are already using Smartsheet to improve processes
- License is required to create new projects but free users can collaborate on existing projects

Questions?

- Contact Nick <u>n-angeloni@northwestern.edu</u>
- Learning Center <u>https://help.smartsheet.com/</u>
- Center of Excellence (Northwestern licensed) <u>https://learn.smartsheet.com/</u>
- Smartsheet Certification (normally \$99) <u>https://excellence.smartsheet.com/</u>

URIC Annual Reports Overview, Updates, and Submission

Joe Boes

Overview

- Due May 14th
- Narrative:
 - Programmatic activity, achievements, goals, and reflection
- Finance:
 - URIC Allocation budget plan and requests
 - Management budget request (budget authority)
- Information collection (non-budget appendices)
 - Keep limiting, but collecting useful items
 - Updates on content focused here

Updates

- No changes to budget
- Removed Appendices
 - Space
 - Personnel listing
 - Core Facilities Evaluation
- Reduced Information
 - Scholarly Output
 - Honors & Awards
 - Outreach
- Submission process & Smartsheet for appendices

Submission Process

- 1. Complete the Narrative
 - a) 7 pages, main focus of AVP review
- 2. Upload to Box
 - a) Appendix 1: Strategic Plan (no template*)
 - b) Appendix 9: Organizational Chart
 - c) Appendix 11: Basic Continuity Plan
 - d) Appendix 12: OR URIC Allocation and Management Budget Request



AR_1_TEMPLATES

Annual Reports -...and Guidance.xlsx

Ap09 URIC Orga...al Chart_FY21.xlsx

Ap11 URIC Basic Continuity Plan.xlsx

Ap12_URIC_Alloc..._032921_FNL.xlsx

URIC Annual Rep...Instructions_FY21

Submission Process, continued

- 1. Complete Non-budget appendices on Smartsheet
 - a) Appendix 2: Advisory Board(s)
 - b) Appendix 3: List of Active Institute/Center Faculty Membership
 - c) Appendix 4: Scholarly Output
 - d) Appendix 5: Honors and Awards
 - e) Appendix 6: International Collaborations/Activities
 - f) Appendix 7: List of Active Institute/Center Trainees
 - g) Appendix 8: Outreach
 - h) Appendix 10: Research Enabled

2. Submit Smartsheet form for attestation and submission (direct link)

- a) Attest to Facilities Connect and myHR Position listing review/updates
- b) Attest to updating Smartsheet files above
- c) Enter name to sign, and click submit
- d) Review for completion and any revisions needed will occur



ළ zURIC - CLF Actions y Name Sharing Workspace Shared To 🔲 Annual Reports - Links and Guidance Workspace Alexandra Manetas 0 Owner AP02 Advisory Board Workspace Joseph Boes AP03 Membership Workspace AP04 Scholarly Output Sheila M. Judge Workspace Editor - can share AP05 Honors and Awards Workspace MICHELLE SURAN AP06 International Collaboration Workspace AP07 Active Trainees Workspace + 🎗 AP08 Outreach Workspace + 👤 AP10 Research Enabled Workspace

HR Updates

Beth Abbott

Closing & Questions

THANK YOU!!