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URIC
Administrative Meeting
April 20, 2021

Agenda
April 20, 2021

TIME	TOPIC	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
  - http://scholars.northwestern.edu/
- 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)

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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 http://smartsheet.northwestern.edu
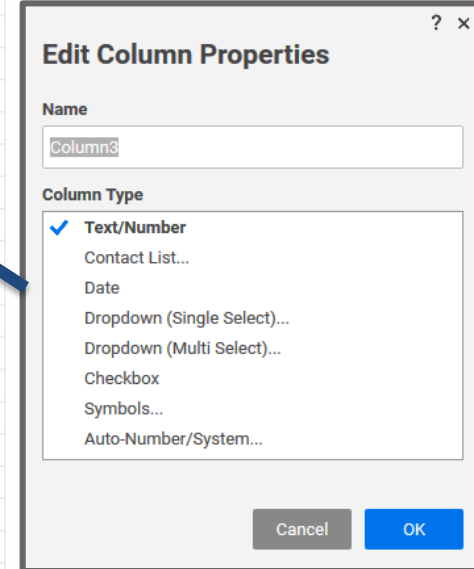
Key Advantages vs. Excel

File attachments and links can be added to individual rows or entire sheet
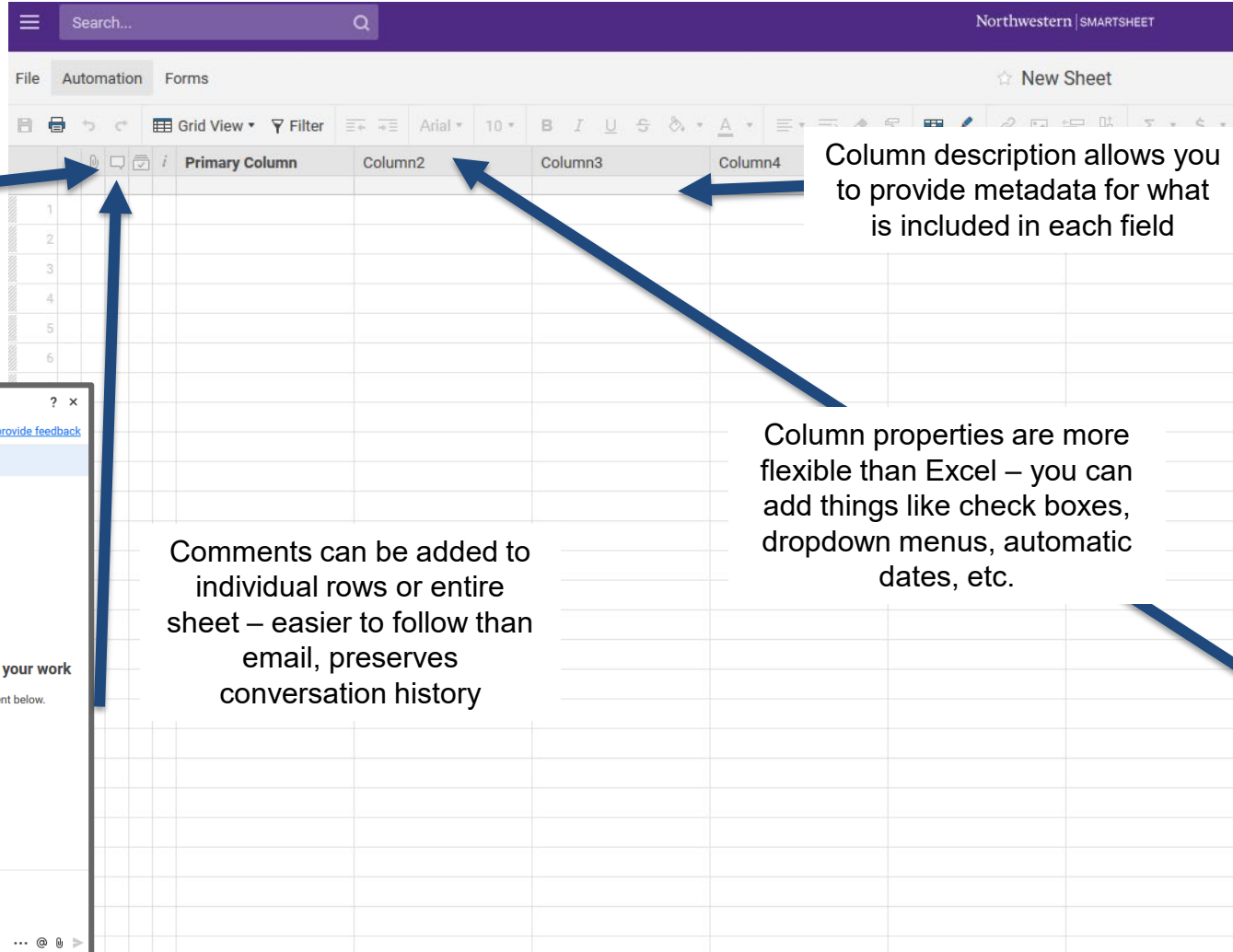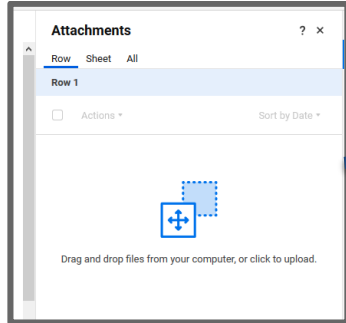
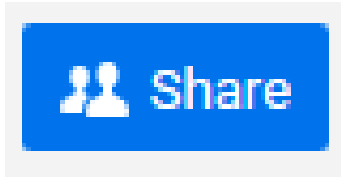Column description allows you to provide metadata for what is included in each field
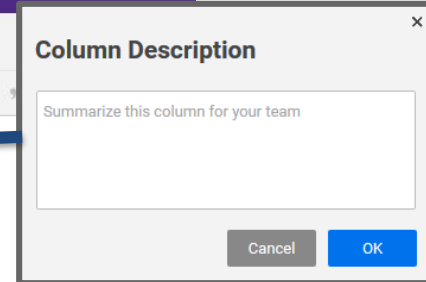
Column properties are more flexible than Excel – you can add things like check boxes, dropdown menus, automatic dates, etc.

Comments can be added to individual rows or entire sheet – easier to follow than email, preserves conversation history
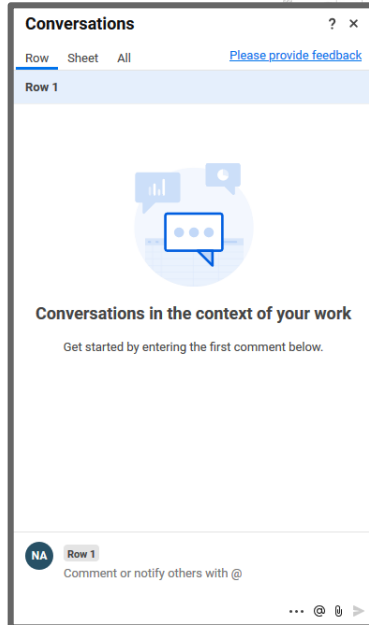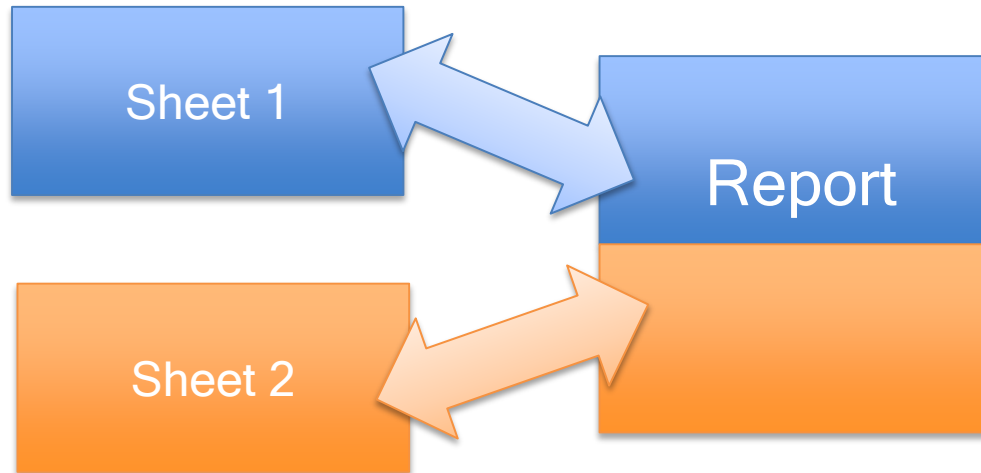
Sharing in Smartsheet

- 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

Reports 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

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
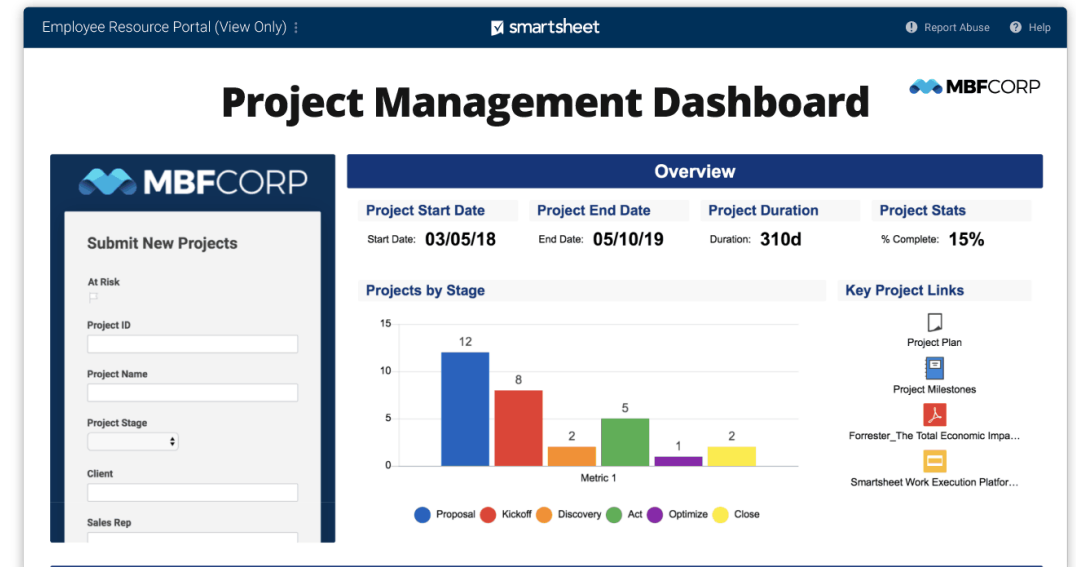
Dashboard Widgets

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Metric
Display key cell values from a sheet.

Chart
Chart data from a sheet or report.

Shortcut
Link to commonly accessed files, URLs, and Smartsheet Items.

Report
Display a report on the dashboard, with optional Gantt view.

Image
Add a company logo or any other image to your dashboard.

Title
Add a title to your dashboard.

Rich Text
Enter richly formatted text for instructions or updates.

Web Content
Display videos, Smartsheet forms, and other web content for your team.

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

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Smartsheet Forms

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

Smartsheet Workflows

- 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 - **$349 per year per user**
  - Group licenses are not currently available
  - Northwestern admin is Joseph Kurtin

Feature	Licensed	Free
View sheets/reports/dashboards	✅	✅
Edit sheets/reports	✅	✅
Add new rows of data	✅	✅
Add new columns, edit column properties	✅	❌
Create sheets/reports/dashboards	✅	❌
Edit dashboards	✅	❌
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 – n-angeloni@northwestern.edu
- Learning Center – https://help.smartsheet.com/
- Center of Excellence (Northwestern licensed) – https://learn.smartsheet.com/
- Smartsheet Certification (normally $99) – https://excellence.smartsheet.com/

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
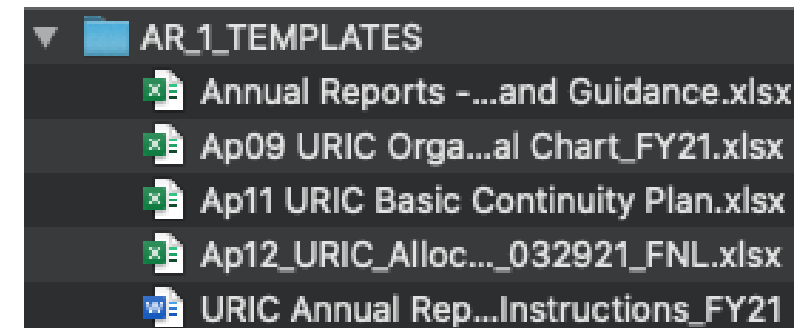- Submission process & Smartsheet for appendices

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
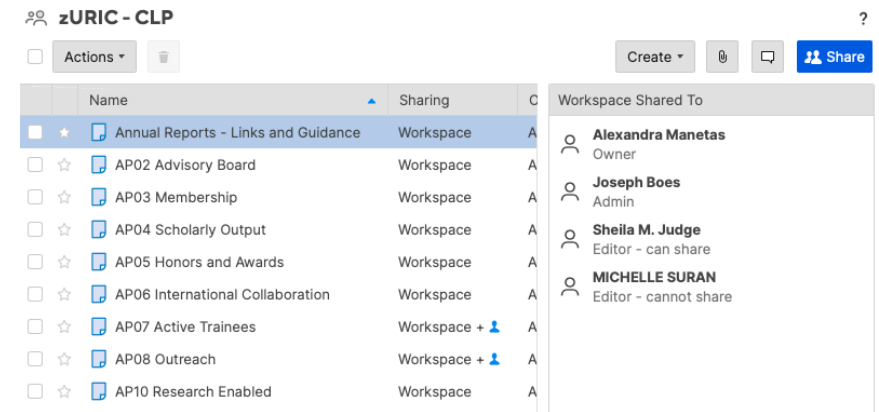
2. Submit Smartsheet form for attestation and submission (direct link)
   a) Attest to Facilities Connect and myHR Position listing review/updates
   b) Attest to updating Smartsheet files above
   c) Enter name to sign, and click submit
   d) Review for completion and any revisions needed will occur

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HR Updates

Beth Abbott

Closing & Questions

THANK YOU!!