URIC Administrative Meeting

2.16.23
<table>
<thead>
<tr>
<th>TOPIC OF DISCUSSION</th>
<th>PRESENTER</th>
</tr>
</thead>
<tbody>
<tr>
<td>Announcements, 2023 Annual Reports and SR CLEAR meetings</td>
<td>Natalia Glubisz</td>
</tr>
<tr>
<td>FY23 Q2 Projections</td>
<td>Harshika Kanwar</td>
</tr>
<tr>
<td>Research administration updates</td>
<td>Brittany Patrick</td>
</tr>
<tr>
<td>CERES Reports</td>
<td>Nick Angeloni</td>
</tr>
</tbody>
</table>
Welcome back Brittany Patrick!
Manager, Research Administration (URICA)

- Leads URICA pre award team
- Develop/oversee complex proposals
- Establishes procedures and updated processes
- Streamline workflows
- Will oversee training to URICs as needed (i.e. CERES)
2023 Annual Reports

3/31: Call planned to go out with instructions
5/12: Deadline to return reports

- Individual URIC Folders will be in Sharepoint
- **ALL appendices will be in Sharepoint under "2023 Appendix Templates" (compared to last year being split out between Box and Smartsheets).**
- We will be reaching to you in May after the Annual reports are due for details (by chartstring by account – for gifts, endowment and recharge)
- For the Base column in Appendix 12 please include position and names.
- Please fill out this [Smartsheet](#) link to list who needs access to your URIC folder

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**One Change for Appendix 12 – Management Budget Summary and Management Budget Operating will not be separate tabs (GL077 tab)**
The Northwestern Central & Local Exchange for Effective Administration of Research (CLEAR)

- **CLEAR MEETINGS** (Through Sponsored Research)
- Meetings are presented on a bimonthly basis via Zoom Webinar on the second Tuesday of the month

April CLEAR Meeting
Tuesday, April 11, 2023, 10am
Key topics: CERES Go Live
[Register now for the April Meeting](#)

June CLEAR Meeting
Tuesday, June 13, 2023, 12pm
Key topics: Foundation Relations, Buehler Center Evaluation Support
[Register now for the June Meeting](#)
Harshika Kanwar
Q2 Forecast
Q2 Forecast (Q3-Q4 Projections)

• Reminders:

  • Gifts and Endowments to be broken out from Operating.

  • Sponsored: Focus on expenses and then the revenue should be offset in “Grants & Contracts – Direct” to net zero.

  • Budget is provided, please comment on significant variances.
Q2 Forecast (Q3-Q4 Projections)

**NEW**: Each URIC will have access to a SharePoint folder.
- Please fill out this [link](#) to provide who needs access

**March 8th** – Your Q2 forecast template will be available in SharePoint.
- Q2 YTD actuals will be prepopulated.

**March 10th** – Deadline for Q2 Forecast submission. Please update SharePoint and notify Harshika.
Brittany Patrick
Research Administration Updates
Revised **Biographical Sketch** and **Current and Pending (Other) Support** formats for consistency with the (PAPPG) ([NSF 23-1](https://www.nsf.gov)). The requirement to use the revised formats is effective for proposals submitted or due on or after January 30, 2023 (this includes the certification/signature requirement).

These revised formats are now available in **SciENcv** and on the **NSF Policy Office website**. As a reminder, the mandate to use SciENcv only for preparation of these senior personnel documents will go into effect for new proposals submitted or due on or after October 23, 2023.

***Utilizing SciENcv for biosketches and current and pending is strongly encouraged prior to the October 2023 mandate.***
CERES Implementation Updates

KEY PROPOSAL SUBMISSION DATES

- **April 13** (4/13, 5pm is the last day to submit a proposal using InfoEd for review)
  This means --> Proposals due after 4/13 but before the CERES go live date of 4/24, must be submitted by 5pm on 4/13 to be reviewed and submitted through InfoEd

- **April 14-23** (starting 4/14 will somewhat of a "blackout period" for InfoEd)
  This means --> Only emergency submission requests will be granted by SRo during this time period on a case-by-case basis.

- **April 24-25** (CERES goes live 4/24!)
  This means --> CERES is live, and we officially will be utilizing this exciting new system for proposal submissions, agreement tracking and more! Proposals due on 4/24 or 4/25 will hopefully have been submitted prior. However, for proposals due on these dates that did not get entered in InfoEd by 4/13, please understand that these first two days will be a busy and critical time for SRo, research administrators and faculty across the university as everyone adjusts to our new system.
Cutover: Key Dates

- **Last day to Submit Change Requests**
  - Change Requests due to Sponsored Research by 5PM
  - **4/10**

- **Last Date to Submit**:
  - Proposals for Review
  - Subcontract Requests
  - Agreement Requests
  - **4/13**

- **InfoEd becomes Read-Only**
  - InfoEd will continue to be available for a fixed period of time
  - **4/20**

- **Go-Live**
  - **4/24**

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**Award Setup Freeze**

- If you have a proposal due after 4/13, it **must** be submitted to SR before 5PM on 4/13.

- After 4/13 SR will not accept any additional proposals, subcontract requests or agreements requests until CERES goes live.
- If RAs miss the deadline, they will need to re-enter data in CERES after Go-Live.
- Sponsored Research will review emergency requests on a case-by-case basis. Only urgent sponsor needs will be granted.
URICA IN-UNIT, INSTRUCTOR LEAD TRAININGS for CERES
Late March/Early April

- URICA RAs will be hosting a series of In-Unit, Instructor-Led trainings for CERES
- Sessions will be in late March/early April and cover the following topics:
  
  **Creating and Submitting a Proposal course**
  **Managing Awards course**
  **Creating and Submitting an Agreement course**

- Additional materials and tools will be available
  - Including a CERES 101 course video (AVAILABLE NOW!)
  - CERES Faculty Resource Link
    [https://sponsoredresearch.northwestern.edu/sra-transformation/faculty-resources.html](https://sponsoredresearch.northwestern.edu/sra-transformation/faculty-resources.html)
  - Topic specific training videos

***Please plan on attending the In-Unit training and please reach out to Brittany or Natalia with more questions or concerns.***
CERES IMPLEMENTATION TEAM/HURON
OPEN LAB SESSIONS
April

• The CERES implementation team will offer corresponding Open Lab Sessions

• 4/4, 4/11, 4/18 and 4/25

• Everyone is invited and encouraged to attend. We will be disseminating details and sign up on the list serve once received.
NEW! URICA Open House Hours
Mid March

• NEW! “Open House” hours that the URICA pre and post award team will be launching

• The URICA team is excited to offer open hours 2x a month, the first and third Thursdays of each month, from 2-4pm, 30 minute slots

• We want to make sure we are available to answer questions and concerns regarding Pre and Post Award; and especially any questions surrounding the upcoming launch of CERES!

***Calendly sign up link will be disseminated on the list serve for those who are interested.
CERES 101 is now available!

[Image of Northwestern University webpage]

https://learn.northwestern.edu/

Search for “CERES 101” – course is open to anyone at Northwestern
CERES Report Changes Overview

- **Following launch of CERES**, Cognos CERES Reports and Self-service solution will be found in "Grants and Agreements” folder

- Grants and Agreements” folder now contains:
  - Cognos reports in one folder, grouped by subject area
  - Links to related reports such as ER001 - Committed and Certified Effort and GM092 - Subcontract Monitoring Report
  - Self-Service Reporting
# Proposal Reports

<table>
<thead>
<tr>
<th>NEW CERES Report Number and Name</th>
<th>OLD InfoEd Report Number and Name</th>
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<tbody>
<tr>
<td>GA101 - Proposal Detail</td>
<td>GM071 - Monthly Proposal Detail</td>
</tr>
<tr>
<td></td>
<td>GM052 - Faculty Proposal Activity</td>
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<tr>
<td></td>
<td>GM074 - Proposal Analysis</td>
</tr>
<tr>
<td>GA102 - Proposal Summary by Department</td>
<td>GM066 - Proposals Summary by Management Area</td>
</tr>
<tr>
<td>GA103 - Proposal Summary by PI</td>
<td>New</td>
</tr>
<tr>
<td>GA104 - Proposal Summary by Sponsor</td>
<td>GM065 - Proposals Summary by Sponsor Type</td>
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<td>GM048 - Sponsor Trends: Proposals</td>
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## Award Reports

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<thead>
<tr>
<th>NEW CERES Report Number and Name</th>
<th>OLD InfoEd Report Number and Name</th>
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<tbody>
<tr>
<td>GA201 - Award Allocation Detail</td>
<td>GM064 - Monthly Award Detail</td>
</tr>
<tr>
<td></td>
<td>GM057 - Faculty Award Activity</td>
</tr>
<tr>
<td></td>
<td>GM072 - Award Analysis</td>
</tr>
<tr>
<td>GA202 - Award Allocation Summary by Department</td>
<td>GM067 - Awards Summary by Management Area</td>
</tr>
<tr>
<td>GA203 - Award Allocation Summary by PI</td>
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<tr>
<td>GA204 - Award Allocation Summary by Sponsor</td>
<td>GM063 - Sponsor Trends: Awards</td>
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<td>GM068 - Awards Summary by Sponsor Type</td>
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## Agreement Reports

<table>
<thead>
<tr>
<th>NEW CERES Report Number and Name</th>
<th>OLD InfoEd Report Number and Name</th>
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</thead>
<tbody>
<tr>
<td>GA301 - Agreement Detail</td>
<td>GM053 - OSR Negotiation Metrics</td>
</tr>
<tr>
<td></td>
<td>GM055 - Negotiation Status Report</td>
</tr>
<tr>
<td>GA302 - Agreement Summary by</td>
<td>New</td>
</tr>
<tr>
<td>Department</td>
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</tr>
<tr>
<td>GA303 - Agreement Summary by PI</td>
<td>New</td>
</tr>
<tr>
<td>GA304 - Agreement Summary by</td>
<td>New</td>
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<tr>
<td>Agreement Type</td>
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## Current, Pending, & Completed

<table>
<thead>
<tr>
<th>NEW CERES Report Number and Name</th>
<th>OLD InfoEd Report Number and Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>GA401 - Current Awards - All Roles</td>
<td>GM060 - Current, Pending and Completed Support: Active Awards-All Roles</td>
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<tr>
<td>GA402 - Pending Proposals - All Roles</td>
<td>GM085 - Current, Pending and Completed Support: Pending Proposals</td>
</tr>
<tr>
<td>GA403 - Completed Awards - All Roles</td>
<td>GM084 - Current, Pending and Completed Award</td>
</tr>
</tbody>
</table>
Integrated Reports

GM092 - Subcontract Monitoring Report and
ER001 - Committed and Certified Effort

will retain current names

All other reports using transactional data from NU Financials are unaffected
Retired Reports

The following InfoEd reports are being retired due to low usage or duplicated information. Similar functionality for these reports can be found in other reports or in Cognos Self-Service. Please contact Nick with questions or concerns.

- GM030 - Award Amount Expected
- GM049 - Aging Submitted Proposals
- GM059 - Proposed and Funded Cost Share
- GM070 - Awards with Required Cost Sharing
- GM073 - Proposal Success Rate
- GM090 - Award Projection Report
CERES Report Available Data

• Summary of InfoEd data migrated to CERES
  – Awards: Active
  – Agreements: In Negotiation and Active
  – Proposal: Limited information migrated

• Datamart and Cognos Reports will
  – Include data from CERES and InfoEd
  – Include from InfoEd: All Proposals, Completed Awards and Agreements
  – Support longitudinal reporting
More Information

CERES site:
https://sponsoredresearch.northwestern.edu/sra-transformation/index.html

CERES FAQs:
https://sponsoredresearch.northwestern.edu/sra-transformation/ceres-faqs.html
Open Discussion
Thank you!