

# Research Administrators' Network Meeting

## AGENDA

May 17, 2023

2:00-3:30 p.m.

Zoom Webinar

## Welcome & Introductions

Cathy Liebowitz, RAAC Communications Subcommittee

Jennifer Huntington, Guest Emcee

## RAAC Metrics Resources for Research Administrators

Jennifer Huntington, ISR and Chair, RAAC Metrics

## Updates

**RAAC Update** – Chris DeVries, RAAC Project Manager

**Information and Technology Services** - Carolyn Pappas, Program Manager, ITS

**Sponsored Programs** - Kristie Beckon, Reporting Asst. Director, Sponsored Programs

**Office of Research & Sponsored Projects** - Andrea Anderson, Assoc. Director, ORSP

## Closing Remarks

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**RAN schedule for the rest of this Calendar Year:**

<http://orsp.umich.edu/ran>

**Ideas for a future meeting?**

Contact [ran-plans@umich.edu](mailto:ran-plans@umich.edu)

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*Brought to you by the Research Administration Advisory Council (RAAC) Communications Subcommittee.*



# Welcome to RAN!

May 17, 2023

Research Administrators' Network (RAN) Meeting

# Welcome!

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## RAAC Communications Subcommittee

- Christy Bohensky (ORSP)
- Jodi Caviani (Social Work)
- Kara Cristian (LSA)
- Constance Colthorp (ORSP/Spon Progs)
- Cindy Dames (ORSP)
- Lori Deromedi (UMOR)
- Kathy Devereux (UMOR)
- Chris DeVries (ORSP/Spon Progs)
- Prentiss Laich (Spon Progs)
- Melissa Li (Med School)
- Cathy Liebowitz (ISR)
- Amy Lingle (Engineering)
- Sarena Nuttall (Engineering)
- Becky O'Brien (UMSI)
- Thomas Paluchniak (ORSP)
- Ashley Tyler (Spon Progs/OCA)

# Meeting Notes & Details

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- This event is being recorded. The presentation and slides will be posted to the RAN webpage.
- Zoom webinar - watch mode. Chat is disabled.
- You can submit questions via the Q&A function.
- Live captioning is turned on (you can disable this using your settings).
- We acknowledge that the University of Michigan is located on the territory of the Anishinaabe people.

# Our Agenda

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What we have planned for you today

- **Presentations:**
  - RAAC Metrics
- **Updates:**
  - ORSP, Sponsored Programs, ITS

**“The best investment is in the tools of one's own trade.”**

– Benjamin Franklin

# RA Community Kudos

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**Julie Olivero** was installed as Chair of NCURA's Midwest Region

## 2023 OVPR Staff Recognition Awardees:

### **Research Administration Recognition Award -**

- **Rebecca Youmans DeMoss**, research administration senior manager, Med School
- **Sheree M. Temple**, research administration senior manager, Pharmacy

### **OVPR Exceptional Staff Recognition Award**

- **John Corthell**, industry relations manager, Innovation Partnerships, OVPR
- **Darlene Pennington-Johnson**, export controls officer and director of Export Controls Program, OVPR

### **Research Study Coordinator/Manager Staff Recognition Award**

- **Lauren M. Smith**, research area specialist senior, SPH

# Coming Soon

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- **Virtual Networking Sessions**
  - Depending on your feedback (stay tuned!), we may have a follow-up session to this meeting with RAAC Metrics.
  - We also have a few other ideas for June, July, and August, as we celebrate **1 year of offering these sessions!**
- **More 21 Questions with RA community members**
- **October RAN**

# Our Emcee - Jennifer Huntington, B.S., CRA

- Research administration senior manager, ISR
- 16+ years in research administration
- RAAC Metrics Subcommittee Chair, and long-time member; RAAC DEI workgroup member
- Jennifer's family recently expanded to include new puppy Xena







# RAAC Metrics Resources for Research Administrators

May 17, 2023

RAN Meeting

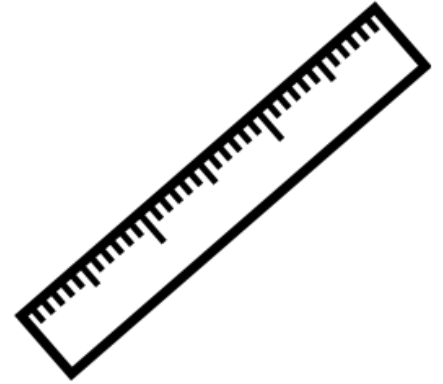
Jennifer Huntington / Research Administration Senior Manager, ISR

# RAAC Metrics Charge

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Assist those interested in research administration **data** by enabling them to acquire the information desired to meet their strategic and operational data needs. We do this by:

- Helping **locate** reporting resources;
- Working to **educate** about using the resources; and,
- Doing our best to **advocate** for availability and experience.

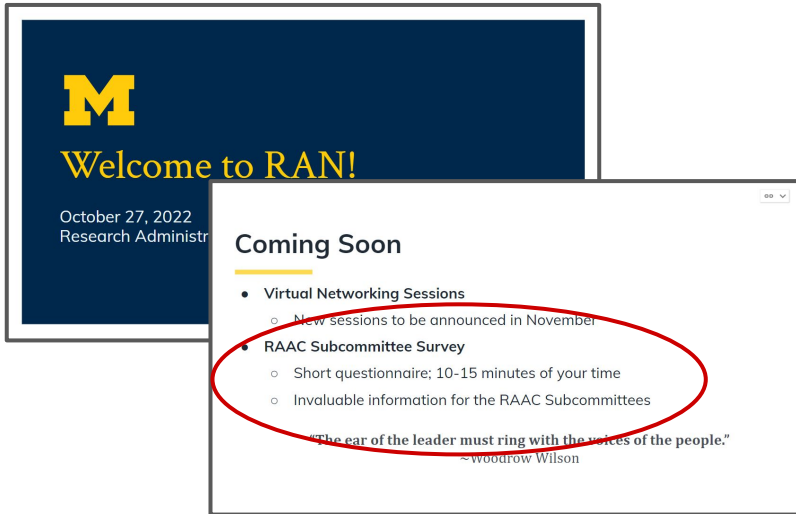


# RAAC Metrics Membership

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- Chris Allan (ISR)
- Steve Beach (LSA)
- John Cristiano (Dearborn)
- Chris DeVries (RAAC)
- Laura Dickey (ORSP)
- Stephanie Hensel (Marsal School)
- Jennifer Huntington, chair (ISR)
- Adam Mall (Sponsored Programs)
- Melissa Milligan (LSA)
- Vasu Ramani (ITS)
- Mike Randolph (ITS)
- Rachael Lee (Engineering)
- Susan Powell (Engineering)
- Susan Sica (Medical School)
- Polly Simms (ORSP)
- Beth Wenner (ORSP)

# RAAC Survey



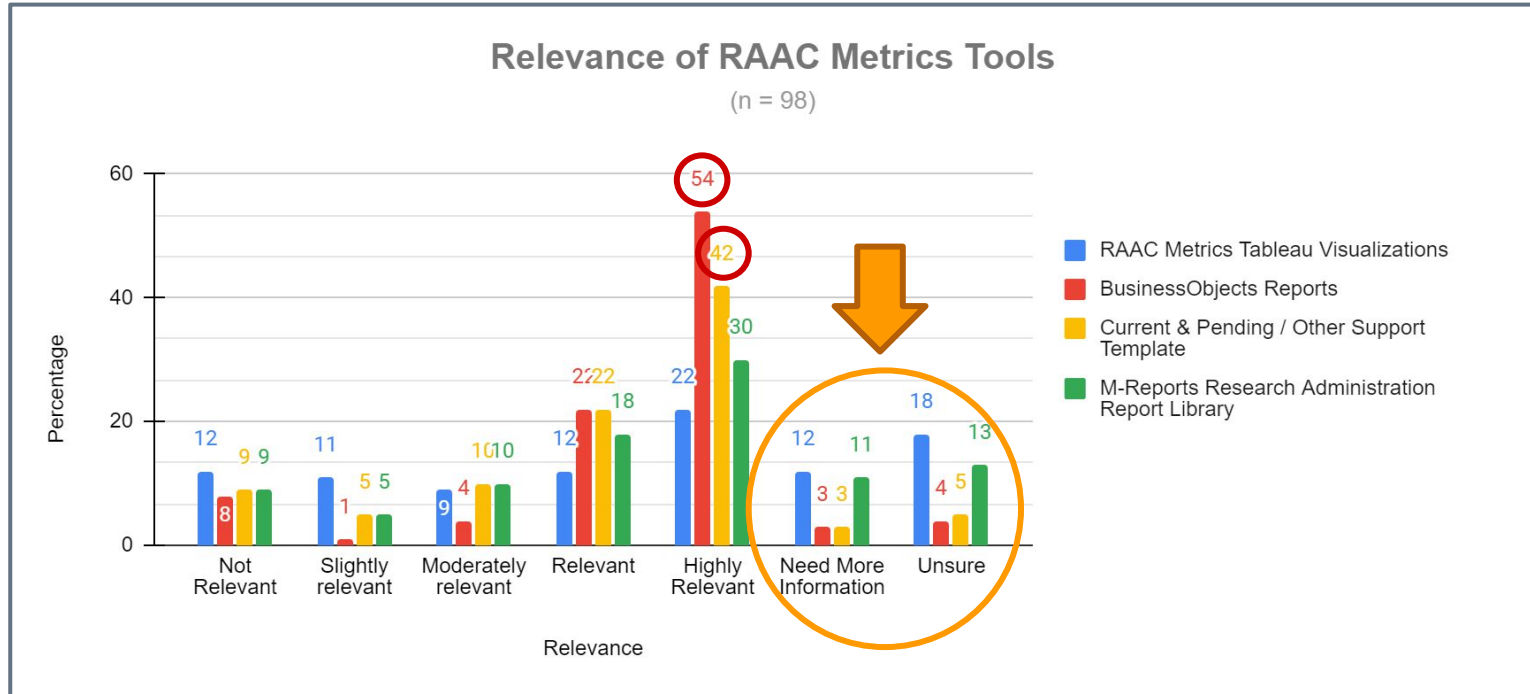
Screenshot of slides from October 2022 RAN meeting.

- We mentioned the survey in the October 2022 RAN Meeting.
- Survey was open for four weeks during November and December 2022.
- Thanks those who submitted one of the 98 responses!
- RAAC Metrics reviewed its results and we are here today to share more about our work.

# RAAC Metrics Overview

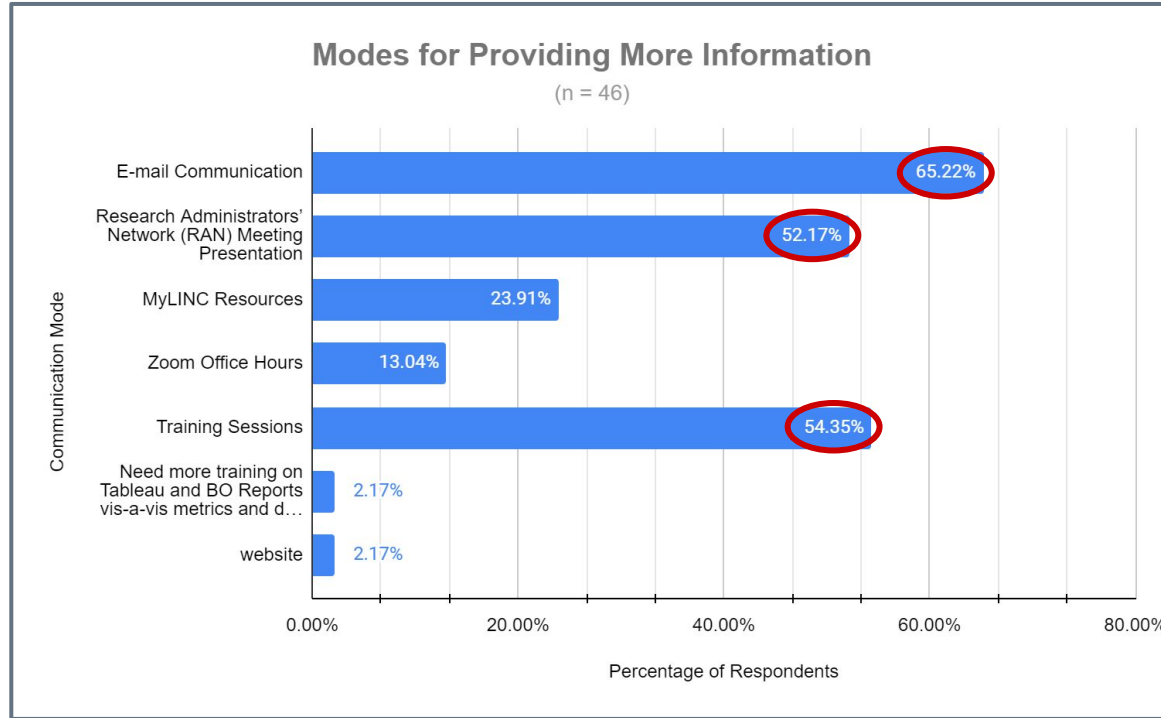
- BusinessObjects reports are highly relevant to respondents.
- The Current and Pending / Other Support report is relevant as well.
- There may be opportunities to partner more with RAAC Training and Communications.

# RAAC Metrics Survey Results



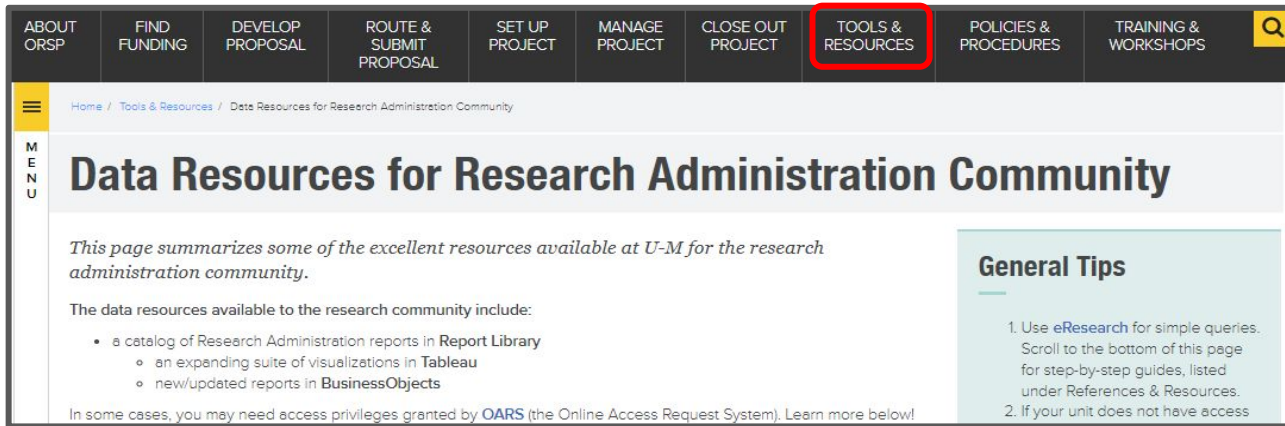
Question text: "Please indicate how relevant and applicable the following RAAC Metrics tools are to your role."

# RAAC Metrics Survey Results



Question text: "If you indicated that you "Need More Information" above, please let us know the mode(s) that would be helpful."

# Resources



The screenshot shows the top navigation bar of the ORSP website. The menu items are: ABOUT ORSP, FIND FUNDING, DEVELOP PROPOSAL, ROUTE & SUBMIT PROPOSAL, SET UP PROJECT, MANAGE PROJECT, CLOSE OUT PROJECT, TOOLS & RESOURCES (highlighted with a red box), POLICIES & PROCEDURES, and TRAINING & WORKSHOPS. Below the navigation bar, the breadcrumb trail reads: Home / Tools & Resources / Data Resources for Research Administration Community. The main heading is "Data Resources for Research Administration Community". A sub-heading reads: "This page summarizes some of the excellent resources available at U-M for the research administration community." Below this, it states: "The data resources available to the research community include:" followed by a bulleted list: "a catalog of Research Administration reports in Report Library", "an expanding suite of visualizations in Tableau", and "new/updated reports in BusinessObjects". At the bottom of the list, it says: "In some cases, you may need access privileges granted by OARS (the Online Access Request System). Learn more below!". To the right of the main content, there is a "General Tips" section with two numbered items: "1. Use eResearch for simple queries. Scroll to the bottom of this page for step-by-step guides, listed under References & Resources." and "2. If your unit does not have access to BusinessObjects and its U-M-Maintained/Research Reports, contact 4-HELP or email 4help@umich.edu with the Subject: 'eRPM ORSP Tier 3' and the details of your request."

Go to <https://orsp.umich.edu/metrics> for this information.

## General Tips

1. Use **eResearch** for simple queries. Scroll to the bottom of this page for step-by-step guides, listed under References & Resources.
2. If your unit does not have access to BusinessObjects and its U-M-Maintained/Research Reports, contact **4-HELP** or email [4help@umich.edu](mailto:4help@umich.edu) with the Subject: "eRPM ORSP Tier 3" and the details of your request.

## Training and Support for BusinessObjects

If you need training and support or an introduction to Business Objects, be sure to check out:

- **Lunch and Learn** session on **Introduction to BusinessObjects and the eRPM Data Set**.
- **Additional Resources** for accessing the **IT4U87: The eResearch Proposal Management (eRPM) data set**.



# M-Reports Report Library



- List of curated reports from multiple reporting tools available to research administrators.
- Useful for serving as a “one-stop shop” for accessing reports relevant to your role.

The screenshot shows the M-Reports Report Library interface. At the top, there is a navigation bar with "M-REPORTS" and "UNIVERSITY OF MICHIGAN" logos, and user options like "cdwile | Sign out | Contact Us | Help". Below the navigation bar, there are tabs for "MY M-REPORTS", "MY M-REPORTS", "FIN. MGMT.", "COMPLIANCE", and "M-REPORTS ADMIN". The main content area is titled "Report Library" and contains a search bar with "MY CRITERIA:" and a "Search" button. Below the search bar, there are dropdown menus for "Data Area" (set to "All"), "Business Process" (set to "Research Administration"), and "Environment" (set to "All"). A table below the search bar lists several reports with columns for "Report Title", "Report Description", "Data Area", "Business Process", "Environment", and "View Details".

Report Title	Report Description	Data Area	Business Process	Environment	View Details
Account Status Detail (ENR)	Review information for Accounts by value or grouping.	Financials	Research Administration	Data Warehouse	Details
AR01 AcctPay Aging Detail by Project (ENR)	Is a more detailed view of outstanding invoices. It is helpful because it shows which invoices are significantly past due.	Financials	Research Administration	Data Warehouse	Details
AR01 AcctPay Statement of Receivables (ENR)	Useful because it shows information about invoice activity (new payments, credit memos, write-offs) during the month.	Financials	Research Administration	Data Warehouse	Details
Approval Response	Allows users to review RFPs in the status of Submitted to Sponsor. To be able to review the status of submitted proposals that UoM is awaiting responses.	Proposals/Grant Management	Research Administration	Tableau	Details

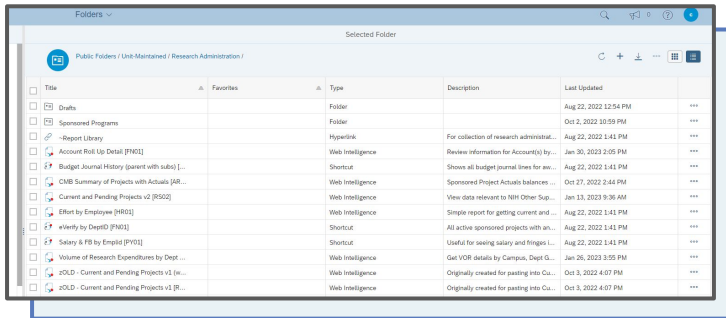
# M-Reports Report Library Demonstration



The screenshot shows the M-Reports Report Library interface. At the top, there are navigation tabs: "MY REPORTS", "ADMINISTRATIVE", "THE REPORT", "CONTRACTS", and "INVESTMENT". The "MY REPORTS" tab is active. Below the tabs, there is a search bar with a dropdown menu for "MY CATEGORY" and a "Search" button. Below the search bar, there are dropdown menus for "Data Area" (set to "Business Process") and "Environment" (set to "Development"). Below these, there are more dropdown menus for "All" and "Research Administration".

Report File #	Report Description	Data Area #	Business Process #	Environment #	View Details
Account Status (Dist. FTE)	Account information for Accounts by sales or geography	Finance	Research Administration	Data Warehouse	Edit
GLS Accounts Data & Data by Product	A query against one of our existing queries. It is used to report on actual sales products etc.	Finance	Research Administration	Data Warehouse	Edit
GLS Accounts, Subtotal of Expenses by Product	Query against a table. Information about product sales. One example used in the video. Query for email	Finance	Research Administration	Data Warehouse	Edit
Qualitative Research	Allow users to access RPTs in the Table of Subtotals in Reports & to view the number of status of subtotals available. RPT for analysis	Proprietary	Research Administration	Table	Edit

# BusinessObjects Reports



A screenshot of a BusinessObjects report library window. The window title is 'Folders - Selected Folder'. The breadcrumb path is 'Public Folders / Unit-Maintained / Research Administration /'. The table below lists various reports and folders with columns for Title, Favorites, Type, Description, and Last Updated.

Title	Favorites	Type	Description	Last Updated
Drafts		Folder		Aug 22, 2022 12:54 PM
Sponsored Programs		Folder		Oct 2, 2022 10:58 PM
-Report Library		Hyperlink	For collection of research administrat...	...
Account Roll Up Detail [FMS]		Web Intelligence	Review information for Account(s) by...	Jan 30, 2022 2:05 PM
Budget Journal History (parent with subo) [...]		Shortcut	Shows all budget journal lines for ac...	Aug 22, 2022 1:41 PM
CMB Summary of Projects with Actuals [AR...]		Web Intelligence	Sponsored Project Actuals balances ...	Oct 27, 2022 2:44 PM
Current and Pending Projects v2 [R502]		Web Intelligence	View data relevant to NH Other Sup...	Jan 13, 2023 9:36 AM
Effort by Employee [HR02]		Web Intelligence	Simple report for getting current and ...	Aug 22, 2022 1:41 PM
eWarily by DeptID [FMS]		Shortcut	All active sponsored projects with an...	...
eSalary & FB by EmpID [FMS]		Shortcut	Useful for seeing salary and fringes L...	Aug 22, 2022 1:41 PM
Volume of Research Expenditures by Dept ...		Web Intelligence	Get VOR details by Campus, Dept G...	Jan 26, 2023 3:50 PM
20LD - Current and Pending Projects v1 [e...]		Web Intelligence	Originally created for parsing into Cu...	Oct 3, 2022 4:07 PM
20LD - Current and Pending Projects v1 [R...]		Web Intelligence	Originally created for parsing into Cu...	Oct 3, 2022 4:07 PM

- There are two collections of reports accessible in Business Objects:
  - **UM-Maintained/Research** (managed by ORSP)
  - **Unit-Maintained/Research Administration** (managed by RAAC Metrics)
- Contains reports on eResearch data, payroll, financial transactions and financial aid.

# BusinessObjects Reports Demonstration



Public Folders / Unit-Maintained / Research Administration / Selected Folder

Title	Favorites	Type	Description	Last Updated
☐ Drafts		Folder		Aug 22, 2022 12:54 PM
☐ Sponsored Programs		Folder		Oct 2, 2022 10:59 PM
☐ -Report Library		Hyperlink	For collection of research administr...	Aug 22, 2022 1:41 PM
☐ Account Roll Up Detail [F901]		Web Intelligence	Review information for Accounts() by...	Jan 30, 2023 2:05 PM
☐ Budget Journal History (parent with subo) [...]		Shortcut	Shows all budget journal lines for an...	Aug 22, 2022 1:41 PM
☐ CMB Summary of Projects with Actuals [AR...]		Web Intelligence	Sponsored Project Actuals balances ...	Oct 27, 2022 2:44 PM
☐ Current and Pending Projects v2 [R502]		Web Intelligence	View data relevant to NIH Other Sup...	Jan 13, 2023 9:36 AM
☐ Effort by Employee [H02]		Web Intelligence	Simple report for getting current and...	Aug 22, 2022 1:41 PM
☐ eVerity by DeptID [F901]		Shortcut	All active sponsored projects with an...	Aug 22, 2022 1:41 PM
☐ Salary & F9 by EmpID [F901]		Shortcut	Useful for seeing salary and fringes l...	Aug 22, 2022 1:41 PM
☐ Volume of Research Expenditures by Dept...		Web Intelligence	Get VOR details by Campus, Dept G...	Jan 26, 2023 3:55 PM
☐ eOLD - Current and Pending Projects v1 [w...		Web Intelligence	Originally created for posting into Cu...	Oct 3, 2022 4:07 PM
☐ eOLD - Current and Pending Projects v1 [B...		Web Intelligence	Originally created for posting into Cu...	Oct 3, 2022 4:07 PM

# Resources – BusinessObjects

## BusinessObjects 4.3 Training Opportunities

### Webinars

A series of webinars was conducted to explain the upgraded system, including demonstrating the system's new look and feel, and introducing some new features. The demonstrations focused on the new UI, running reports, creating reports and exporting data.

Recordings of the webinars are available using the links below:

- [Recording of the August 4 webinar \(MiVideo\)](#)
- [Recording of the September 15 webinar \(MiVideo\)](#)
- [Recording of the September 26 webinar \(MiVideo\)](#)
- [Recording of the October 5 webinar \(MiVideo\)](#)
- [Recording of the October 12 webinar \(MiVideo\)](#)

### Documentation Resources

- The [BusinessObjects - Running Reports eLearning course](#) was updated for BusinessObjects 4.3. The course covers running, exporting, organizing, scheduling, and formatting reports. Even if you have taken this course previously, it provides a good introduction to the upgraded environment.
- The [BusinessObjects 4.3 User Resources website](#) is your one-stop location for all BusinessObjects training materials.
- [Overview of BusinessObjects 4.3 SP2 Changes](#) includes feature mapping between old and new versions.

### Need Help?

Contact the [ITS Service Center](#)

📞 734-764-HELP (4357)

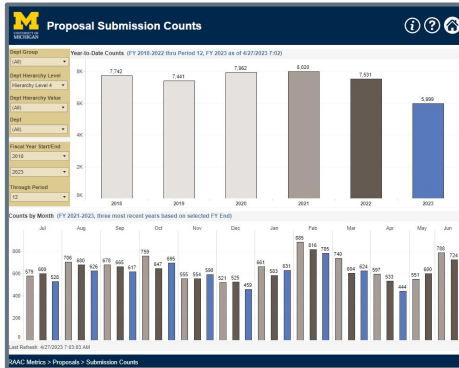
### Contact the BusinessObjects Upgrade Project Team

[BusinessObjectsUpgradeProject@umich.edu](mailto:BusinessObjectsUpgradeProject@umich.edu)

See this link for more information –

<https://its.umich.edu/projects/businessobjects-upgrade/training>

# Tableau Visualizations



- The RAAC Metrics Tableau visualizations were first published with the intention to help units **explore trends in their research administration data.**
- Visualizations are a great way to summarize and present information to others, like leadership.



# Zoom Poll

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After hearing more about these metrics and reporting resources, please **respond to a brief Zoom poll** so we may better address your needs.

**Which of the following topics would you like more information about?**

(select all that apply)

- BusinessObjects – running reports
- BusinessObjects – editing reports
- M-Reports – uses, tips & tricks
- Tableau – uses, tips & tricks

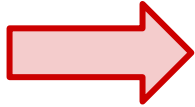
**What modes of learning would be most helpful for you?**

(select all that apply)

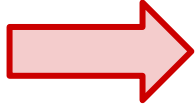
- Virtual Networking Session
- Navigate Course
- Demonstration Videos
- Step-by-step Document



# Need More Information?



Email [raac.metrics.support@umich.edu](mailto:raac.metrics.support@umich.edu) and we would be happy to point you in the right direction or bring suggestions to the subcommittee for discussion.



Post your question to the [RA Forum on Slack](#). We have assisted with data needs on Slack and we hope to grow this as a forum to share data and reporting resources.

**Thread # general**

Hi all. Didn't there used to be a decision tree for looking up account codes for the expense account rollups?

5 replies

4 months ago

Yes, this is the excel version I have. Not sure if there is a more up to date version out there. If there is, can you post it up or share where it is located.

Excel Spreadsheet ▾

**Account Detail 2019.xlsx**  
Excel Spreadsheet

**Tree Roll-up Detail for Expense & Revenue Accounts**

Enter Account #

**SOA Account Tree Information**

Fiscal Year	19/20
Status	19/20
Description	19/20
Account Type	19/20
Type Description	19/20
SOA Group	19/20
SOA Group Description	19/20

4 months ago

Thanks! Someone sent me a version over email. Looks like it's from 2020. I guess you have to request it from Sponsored Programs.

1 👍

**#+ Also sent to the channel**

3 months ago

Hello everyone:

To follow-up on this thread regarding the Account Detail for Expense and Revenue Accounts, the RAAC Metrics Subcommittee has created a BusinessObjects version, which may be

**Thank you!**



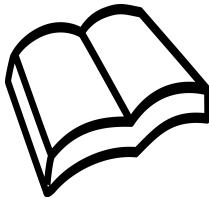
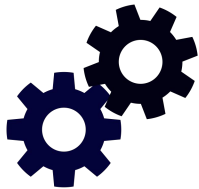
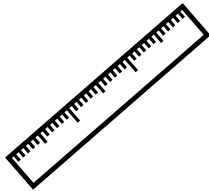
# RAAC Update

May 17, 2023

RAN Meeting

Chris DeVries / RAAC Project Manager

# RAAC Chairs Update



- Patrick Laguna will be stepping down from the RAAC Training Chair role as of July 1, 2023.
- We are conducting a broad search for a successor and are piloting a Co-Chair role.
- More information is forthcoming via email and posted on Slack.
- Send candidate names to Chris DeVries ([cdevrie@umich.edu](mailto:cdevrie@umich.edu))

# National Council of University Research Administrators (NCURA)



## NCURA

Supporting Research...*together*<sup>™</sup>

National Council of University Research Administrators

## NCURA National Meeting Bulk Discount

- We will be organizing an opportunity to take advantage of a bulk discount for the 2023 NCURA National Meeting (August 6-9).
- Discount levels:
  - Register **5 or more** and receive:
    - 10% off meeting registration;
    - \$20 off one year of NCURA dues.
  - Register **10 or more** and receive:
    - 10% off meeting registration;
    - \$40 off one year of NCURA dues.
- More information will be forthcoming.

# April 2023 Virtual Networking

- We conducted a Virtual Networking Session focused on Graduate Student Research Assistants (GSRAs).
- U-M Human Resources (UHR) asked that we share their [Graduate Student website](https://hr.umich.edu/working-u-m/my-employment/academic-human-resources/graduate-student), which has more information about GSRA appointments.

UHR Graduate Student website; full URL:  
<https://hr.umich.edu/working-u-m/my-employment/academic-human-resources/graduate-student>

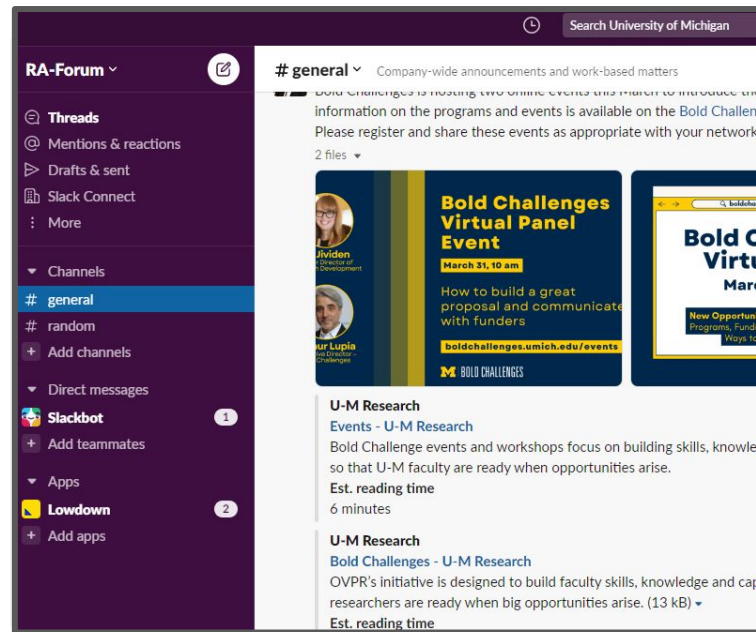
# RAAC DEI Workgroup



- We are planning a June newsletter and please contact [raac.dei.help@umich.edu](mailto:raac.dei.help@umich.edu) and request to subscribe.
- In response to the RAAC Survey, we are compiling resources and tools related to inclusive hiring practices. We are excited to share more as we continue this work!

# Don't forget to join us on Slack!

- We continue to grow the RA Forum on Slack.
- Announcements, job postings, sharing resources and best practices, getting to know other RAs, and more!
- [um-orsp-ra-forum.slack.com](https://um-orsp-ra-forum.slack.com)



Screenshot of a post from the RA Forum on Slack.



**Thank you!**



# ITS Update

May 17, 2023

Research Administrators' Network (RAN) Meeting

Carolyn Pappas / Program Manager, ITS

# eResearch Proposal Management (eRPM) system update

As of Monday, May 15, 2023

- **New!** Sponsor Information question for federal sponsors on PAFs and CTRFs
- **New!** SUBKs tab on Award now displays in a sortable, filtered list
- **New!** Award Mod/ACR supporting documents enhancement

# eRPM: Sponsor Information changes



- Proposal Approval Form (PAF) and CTRF changes
  - New, required question within **1.7** to indicate:  
**Is the sponsor is a U.S. Federal Government entity?**
    - **If yes**, select the U.S. Federal Government sponsor (code).
  - *Affects all newly created and editable/in-process PAFs*

**INFORMATION AND TECHNOLOGY SERVICES UNIVERSITY OF MICHIGAN** eRESEARCH | PR

**Validate** << Editing: 2

**1. General Information**

Introduction

**Sponsor Information**

Project Information

**2. People**

Project Personnel

UM Investigators

**1. General Information**

**Sponsor Information**

1.7 \*  
Sponsors: ?  
+ Add

Update

**Edit PRPSL\_Project Sponsors**

Select the Sponsor Role:\* ?  
Direct

Is the sponsor a U.S. Federal Government entity?\* ?  
 Yes  No Clear

Select the U.S. Federal Government sponsor:\* ?

Check here if the sponsor code cannot be found: ?

# eRPM: Sponsor Information changes



- Ability to search for and enter the entity's sponsor code

Note: Each sponsor has two codes, one for **Direct** and one for **Prime**. eRPM automatically filters the lists so only the relevant code displays.

ID	Short Name	Official Name
894900	ACF-DHHS-US	Health and Human Services, Department-of-Administration for Children and Families
895100	ACL-DHHS-US	Health and Human Services, Department-of-Administration for Community Living
894600	AHRQ-DHHS-US	Health and Human Services, Department-of-Agency for Healthcare Research and Quality
875900	AirForce-DoD-US	Defense, Department-of-Air Force, Department of the
882150	Army-DoD-US	Defense, Department-of-Army, Department of the
869950	CBO-US	Congressional Budget Office
895300	CDCP-DHHS-US	Health and Human Services, Department-of-Centers for Disease Control and Prevention
869980	CFPB	Consumer Financial Protection Bureau
865500	CIA-US	Central Intelligence Agency
894800	CMMS-DHHS-US	Health and Human Services, Department-of-Centers for Medicare and Medicaid Services

- Filter by
  - ID
  - Short Name
  - Official Name
- Tips
  - Use (%) wild card and acronym
  - See [Short Names and Codes for U.S. Federal Entities in eRPM](#) reference

# eRPM: Sponsor Information changes



- Smartform Validation Rule to ensure the new question is answered

▼ **1. General Information**

Introduction ✓

**Sponsor Information** ✗

✗ Please update the sponsor(s) to indicate if this is a US Federal Government entity.

# eRPM: Sponsor Information changes



**M** INFORMATION AND TECHNOLOGY SERVICES UNIVERSITY OF MICHIGAN eRESEARCH | PR

Validate

Editing: 2

- 1. General Information
  - Introduction
  - Sponsor Information**
  - Project Information
- 2. People
  - Project Personnel
  - UM Investigators
  - Administrative Personnel
  - Project Administration
  - Project Personnel Details
- 3. Budget
  - Budget Components
  - Budget and Time Period
- 4. Space

### Add PRPSL\_Project Sponsors

Select the Sponsor Role.\* ?  
Direct

Is the sponsor a U.S. Federal Government entity?\* ?  
 Yes  No Clear

Select the U.S. Federal Government sponsor.\* ?  
Health and Human Services, Department of-National Institutes of Health ... ✕

Check here if the sponsor code cannot be found: ?


\* Required

OK OK and Add Another Cancel

# eRPM: Sponsor Information changes



- **Resources to Learn More**

- Updated Help within eRPM, question 1.7 
- [Add/Update Sponsor Information](#) job aid with more screenshots
- [Demo of PAF Sponsor Information](#) (1 minute video)
- [Short Names and Codes for U.S. Federal Entities](#) complete list and instructions on ORSP's website
- [eRPM Version 7.0](#) release notes



# eRPM: Award Mod/ACR Tab Update



- Added a **Supporting Documents** list to the **Mod/ACR** tab of the Award (AWD) workspace
  - Conditionally displays links if there is one or more Support Documents attached
  - Toggle can be expanded and collapsed

The screenshot shows the 'Mod/ACR' tab selected in a navigation bar. Below the navigation bar, there are two document lists. The first list, 'Award Documents', contains one entry: 'AWD011511\_ARC Phase V Agreement W56HZV-19-2-0001.pdf(0.03)' with version number 0.03 and modified date 2/15/2019 4:24 PM. The second list, 'Supporting Documents', is highlighted with a red rounded rectangle and contains one entry: 'AWD011511\_\_Sponsor Email re CFDA#.pdf(0.01)' with version number 0.01 and modified date 2/7/2019 2:50 PM.

Main   Mod/ACR   Activity Log   \$\$\$   Deliverables   Terms   Contacts   Compliance   SUBKs   Related Records   AWD Docs										
<b>Award Documents:</b>										
Name			Version Number			Modified Date				
	AWD011511_ARC Phase V Agreement W56HZV-19-2-0001.pdf(0.03)		...	0.03		2/15/2019 4:24 PM				
<b>Supporting Documents:</b>										
Name			Version Number			Modified Date				
	AWD011511__Sponsor Email re CFDA#.pdf(0.01)		...	0.01		2/7/2019 2:50 PM				

# eRPM: Other Updates



- PAFs
  - Changed the available selection choices for CTSU questions to M-CTSUs and O-CTSUs, to reflect the consolidation from seven to two offices.
- Unfunded Agreements
  - Resolved an issue where the Central Office Name was cleared when the category type was changed on UFAs and UFAs were getting stuck in the state of “Project Team Making Changes.”

**Thank you!**



# Sponsored Programs Update

May 17, 2023

Research Administrators' Network (RAN) Meeting

Kristie Beckon / Assistant Director, Finance-Sponsored  
Programs

# Audit update



- The 2022 Single Audit is complete.
  - Higher Education Emergency Relief Fund (HEERF) finding.
  - Transposition error associated with Provider Relief Fund (PRF).
- The 2023 Single Audit process is underway.

# Equipment Inventory



- Property Control is working with units to locate all assets
- A reminder about the Navigate eLearning module – [Monitoring Capital Equipment: RA Best Practices](#)

Full Link –

<https://maislinc.umich.edu/Core/pillarRedirect?relyingParty=LM&url=core%2Factivitydetails%2FViewActivityDetails%3FActivityId%3D70623%26UseRMode%3D0>

**CLOSEOUTS**

**479**

**Current late closeouts**

**Current active = 1,236**

Partnership and collaboration go a long way.

There is almost nothing we can't accomplish together!

# Personnel updates

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## New Research Admin Asst

- Clare Light - UG reports



Robert Barker



Clare Light

## New Reporting Accountants (temps)

- Robert Barker
- Tiyashia Poole
- Ling Zhang



Tiyashia Poole



Ling Zhang



**Thank you!**



# ORSP Update

May 17, 2023

Research Administrators' Network (RAN) Meeting  
Andrea Anderson / Associate Director, ORSP

# Agency Updates

**Photo Credit:**

Temple University, Lewis Katz School of Medicine.



**Grace X. Ma:** NIH-sponsored researcher focused on health disparities research among underserved and vulnerable racial/ethnic minority populations. In 2021 she co-chaired the inaugural NIH Asian American Pacific Islander Health Scientific Interest Group Seminar.

# NIH Updates

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- **NIH is transitioning its funding opportunity terminology to better align with Uniform Guidance.**
  - Notice of funding opportunity (**NOFO**) to refer to formal announcements of the availability of Federal funding through a financial assistance program.
    - Previously referred to as funding opportunity announcements (**FOAs**)
    - See the NIH Grants & Funding Glossary for the full definition.
  - Effective immediately; NIH is currently updating websites, documents, and other resources to reflect the new terminology.
- **NIH carry-forward prior approval**
  - When you do not have automatic carryforward you need to obtain approval before you spend the carryforward funds. NIH is taking a hard line on this and denying expenses that have already occurred.



# NSF Account Management System Expands

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- **Now Includes Reviewers**

- Account Management System in Research.gov has self-managed profile
- Uses unique **NSF ID** for all business throughout research career
- Principal Investigators (PIs), Graduate Fellows, and other Administrative Officials already had access
- Reviewers now do too

- **New Gender Response Option in Self-Managed Profile**

- Self-managed Profile has new gender response options under demographic information, expanded to include a new "Unspecified, or another gender identity" selection for reviewers, PIs, and postdoctoral fellows in Account Management
- See <https://www.research.gov/research-web/content/aboutaccountmanagement>



# NSF Virtual Grants Conference Spring 2023

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- June 5 – 8, 2023
- Registration free and opened Wednesday, May 10
  - <https://new.nsf.gov/events/nsf-virtual-grants-conference-june-5-8-2023>
- All recorded conference sessions will be available on-demand shortly after event on NSF's YouTube page

# U.S. Federal Government Entities

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Related to Carolyn's ITS Update, here are some ORSP resources for RAs and Project Teams to note.

- ORSP website has table of the complete list of short names for the federal sponsors in the Route & Submit section:  
[orsp.umich.edu/route-submit-proposal/short-names](https://orsp.umich.edu/route-submit-proposal/short-names)
  - Ex: National Institutes of Health (NIH) projects use one code if its the direct sponsor (895700) and another for the prime (895800).
- This link is in eRPM.
- ORSP will still validate that these codes have been entered correctly.

# Annual RPPR Reminders

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Help us remind project teams to:

- Route Annual RPPRs 2 weeks before the due date to ensure time for the necessary back-and-forth edits, questions, and answers.
- Check ORSP's instructions to ensure routing goes to the right person in eRPM and Commons. Typically, this is one of our support staff members and not a project representative.



# On the Home Front



Photo Credit: © Corey Seeman,  
Univ. of Mich. Squirrels, [Flickr](#)

# Other Staff Updates - Departures/Hiring

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- **On the Move**

- Neil Carver (now at OVPR, Research Development)
- Raymond Cluckey (now at Innovation Partnerships, Corporate Relations)
- Caitlin Jost (now with OVPR Export Controls)

- **Retirements**

- Linda Chadwick
  - Gratitude for her many leadership roles not only at ORSP but also in research administration throughout the University and on the RAAC Executive Committee

- **Interviewing**

- Three (3) Private Team PR positions
- One (1) Government Team PR positions

# Welcome New Staff!



**Jeff Alber**  
Project Representative  
Private Sponsors Blue Team  
(Engineering, Natural  
Sciences)  
Reporting to Emily Baxter)



**Jelly French-Gilmore**  
Support Staff  
Reporting to Tracy Schwab



**Austin Hogg**  
Assistant Project Representative  
Government Sponsors Team  
Reporting to Daniela Marchelletta



**Elena Taryor**  
Assistant Project  
Representative  
Private Sponsors Maize Team  
(Health Sciences)  
Reporting to Joe Johnson

# Promotions and Role Changes

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**Kellie Buss**

Assistant Managing PR for Government  
Sponsors Team



**Joe Johnson**

Assistant Managing PR for Private  
Sponsors Team

# ORSP Government Team



**Karen Alameddine**

Managing Project Representative, Government Sponsors Team



**Kellie Buss, Asst Managing PR**

- Reynaldo Martell, Senior PR
- Patrick Case, PR
- Karen Sampson, PR
- Becca Timmermans, PR
- Jake Young, Asst PR
- Caitlin Nagler, Asst PR



**Ryan Lankton, Asst Managing PR**



**Daniela Marchelletta, Asst Managing PR**

- Tracey Larkin, Senior PR
- Christy Bohensky, PR
- Lizzie Howard, PR
- Erin Kingsley, PR
- Amanda Reel, PR
- Austin Hogg, Asst PR
- Sara Sanders, Asst PR

# ORSP Private Team

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**Patrick Woods**  
Managing PR  
Private Sponsors Team



**Emily Baxter, Asst Managing PR, Blue Team**

*Emily's Team includes:*

- Jeffrey Longe, Senior PR
- Jeff Alber, PR
- Kate Chie, PR
- TBD
- TBD



**Lark Haurert, Asst Managing PR, Clinical Trials**

*Lark's Team includes:*

- Debra Dill, Senior PR
- Patricia Haynes, Senior PR
- Mike McAllister, Senior PR
- Beth Wenner, Senior PR



**Joe Johnson, Asst Managing PR, Maize Team**

*Joe's Team includes:*

- Dan Garber, PR
- Arielle Javarinis, PR
- Thomas Paluchniak, PR
- Shannon Lester-Pelham, Asst PR
- Elena Taryor, Asst PR



**Eric Ward, Asst Managing PR, DUA Team**

*Eric's Team includes:*

- Michael Hudson, PR
- Gabrielle Hammoud, Asst PR
- Michele Quick, Asst PR

# ORSP Volume

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**7,531**

Proposals  
reviewed and  
submitted in  
FY2022

**2,763**

Awards  
processed  
through ORSP in  
FY2022

**2,004**

Unfunded  
Agreements  
executed by  
ORSP in FY2022  
(nondisclosure,  
data use, etc.)

# OVPR Updates







# VISION 2034

ANN ARBOR | DEARBORN | FLINT

- See Survey link in Dr. Cunningham's recent VPR Update
- We are all being asked to imagine what the University of Michigan will look like and accomplish over the next 10 years.
- Tremendous opportunity to identify ways in which we can build a brighter future for the U-M research enterprise.
- <https://vision2034.umich.edu/>

# New OVPR Email for Publication Restriction AAR Status

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- New email for Publication Restriction Status
- Use this to notify OVPR if the request is time-sensitive or status.
  - [ovpr.pub.restriction.status@umich.edu](mailto:ovpr.pub.restriction.status@umich.edu)
  - Thank you to Melissa Karby for creating this in response to RAAC Survey feedback!
- **FYI on Other Types of AARs**
  - Note that most AAR types don't require OVPR involvement.
  - Visit the ORSP website's **Agreement Acceptance Request** webpage ([orsp.umich.edu/aar](http://orsp.umich.edu/aar)) to learn more the other changes that could trigger an AAR
    - e.g., funding change  $\geq 20\%$ , cost sharing change, F&A rate change

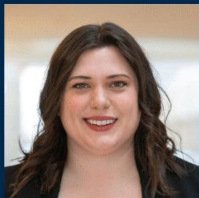
# 2023 OVPR Research Staff Recognition Awards

May 24 at 3:30 p.m. at University Hall in Ruthven

Lauren M. Smith



Elaine Meinzer



Brian Hockley



Mary Ogdahl



Jonathan Reader



Joanne Heerema



## 2023 Research Staff Award Recipients



Anagha Tapaswi



Rebecca  
Youmans  
DeMoss



Sheree M. Temple



Jing Liu



John Corthell



Darlene  
Pennington-  
Johnson

**Thank you!**



# Closing Remarks

May 17, 2023  
RAN Meeting

# Quick Poll – RAN Meeting Relevance

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This poll is anonymous.

Please tell us how relevant you found today's meeting content, on a 5-point scale:

1. Not relevant
2. Slightly relevant
3. Moderately relevant
4. Relevant, or
5. Highly relevant

# Thank You for Attending RAN!

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**Thank you** to our Emcee, the RAAC Metrics subcommittee, the RAAC Communications subcommittee, and to you for joining us today.

**Stay connected** on the Research Administrators' Forum on Slack, and Virtual Networking sessions.

**RAN 2023!** Next RAN meeting is scheduled for October 26th - save the date!

**"There is a great satisfaction in building good tools for other people to use."  
- Freeman Dyson**



# Professional Development Updates

May 17, 2023

Research Administrators' Network (RAN) Meeting



# National Council of University Research Administrators (NCURA)



## NCURA

Supporting Research...together™

National Council of University Research Administrators

## NCURA Region IV

- The 2024 NCURA Region IV Spring Meeting will in Ann Arbor, MI.
  - April 28-May 1, 2024.
  - More details forthcoming.

Visit [ncuraregioniv.com](https://ncuraregioniv.com) for more information

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## NCURA National

- Next NCURA Annual Meeting – August 6-9, 2023, in Washington, DC.
  - Visit [the meeting website](#) for more information.
  - Full meeting website URL – <https://www.ncura.edu/annualmeeting/Home.aspx>

Go to [ncura.edu](https://ncura.edu) for more information

# Society of Research Administrators International (SRAI)



## SRAI National Meeting

- October 14-18, 2023 in Seattle, WA.
- Early Bird Registration is open through August 25, 2023.

<https://www.sraannualmeeting.org/2023/index.cfm>

# National Organization of Research Development Professionals (NORDP)



National Organization of  
Research Development Professionals

## NORDP National

- Save the date for the next virtual conference, to be held November 1-3, 2023.

Go to [nordp.org](https://nordp.org) or [nordpnews.org](https://nordpnews.org) for more information.



# Additional Announcements

May 17, 2023

Research Administrators' Network (RAN) Meeting

# Data Den Research Archive Service

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- The U-M Research Computing Package (UMRPC) is offering the Data Den Research Archive Service.
- Researchers can store **up to 100TB of data at no cost**, even after a grant has ended.
- The service is best for data that is not regularly needed, but needs to be retained per the grant terms and conditions.
- Visit <https://arc.umich.edu/data-den/> for more information.



# Navigate Training Information

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## Navigate E-ssentials eLearning

New Module – [Introduction to Department of Defense \(DoD\) Sponsored Projects](#).

- 15-20 minute course introduces best practices and key terminology.
- Good for those who are new to DoD project administration.
- Includes a job aide – [DoD Common Terms and Definitions](#).

## Additional Training Resources

- [Navigate E-ssentials eLearning Modules](#) available anytime.
- Access the [Navigate Video Resources](#) page to view recordings of previous webinars, lunch & learn sessions and more.





# Kudos and Thanks!

May 17, 2023

Research Administrators' Network (RAN) Meeting

# OVPR Research Staff Awards

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**Congratulations** to our RAAC colleagues who have been recognized as the **2023 Research Administration Recognition Award** recipients!

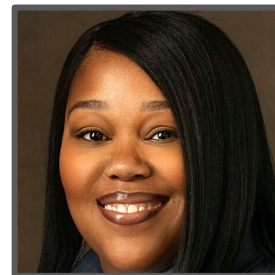
Register for the recognition ceremony – **May 24, 2023 at 3:30 p.m. in University Hall, Ruthven Building** – at the [Research Staff Awards Website](https://research.umich.edu/research-at-michigan/research-recognition-awards/research-staff-awards/).

Full Research Staff Awards Website URL:

<https://research.umich.edu/research-at-michigan/research-recognition-awards/research-staff-awards/>



**Becky Youmans Demoss**  
Research Administration Senior  
Manager, Medical School



**Sheree Temple**  
Research Administration Senior  
Manager, College of Pharmacy