

# Research Administration Advisory Council (RAAC) Committee-at-Large

Tuesday, June 20, 2023, 3:00 – 4:30 pm  
Zoom Meeting  
MINUTES

The meeting started at 3:00 p.m.

## 1. **Welcome** (*Shandra White*)

Shandra welcomed everyone to the meeting.

## 2. **M-Reports / PBSR Planning** (*Patrick Franklin and Mandie Chapman*)

**Attachment #1**

Patrick Franklin and Mandie Chapman presented information related to the new M-Reports project. M-Reports is a reporting platform across the University, and this project will provide new service and security model changes.

### Purpose:

- **Modernize** – A light lift on the user interface, and for all websites to be accessible to those using screen readers.
- **Replace and Retire** – The plan is to integrate with other technologies as M-Reports is outdated and unsupported, and we will re-home reports into those platforms. A majority of reports will move to Tableau.
- **Data Security** – We will also be moving towards a more open and modern security model as with eResearch and other platforms.

### Timeline:

We don't know all the ways people use M-Reports but we are looking to stay flexible as we approach making improvements. We are looking for input from everyone. The goal is to migrate reports over in the next 18-24 months. M-Reports will run parallel before it is retired. The implementation date is TBD.

- **Planning & Analysis** – Analyzing the usage of the 130 reports.
- **Modernize** – User interface development, testing, and rollout to end users. (2023)
- **Communications and Change Management** -- An audience analysis was performed and comprehensive communications and change management strategy will be developed.
- **Training** – Will support end-users through support sessions as well as webinars/training. (2024)
- **Replace** – Data infrastructure will be developed and reports will be migrated. End users can run reports in parallel to test their business processes. (2024 - 2026)
- **Retire** – M-Reports will be retired at a future date that has yet to be determined. (2026).

### User Interface:

We will be implementing a new user interface to a framework that enhances the accessibility score. Some usability benefits that we hope to realize are:

- Getting left handed navigation removed, which is redundant. All reports will be accessed from the top navigation bar.

- The pages will be screen reader friendly with more page real estate and updated color scheme.

#### Data Security:

We will be bringing reports into the same modern 'data campus' we use for data security and data set access. The proposed future solution is at the department level vs. at a single user view. It will be easier to maintain, increase transparency, all dataset access requests are tracked through ITS, and remove the delegation process.

#### Replacement Solutions:

Most reports will be moved to Tableau, but it will still be possible to request your information to download, and will be able to automate. For those who want reports emailed to them, BusinessObjects is a better option. We are looking to move to more of a data mart model for the data warehouse., which will be helpful for those who use custom reporting tools.

We will retire M-Reports after all reports and functionality have been replicated and users have had a period of time to use the system in parallel. We are targeting late 2025. We want to be transparent and want input from everyone to help make it better for you. You can volunteer for testing, training, etc. throughout the process.

Kathy D. mentioned that as we have been building and improving eRPM, there have been many opportunities for input from the RA community. Will that be the same for this project? Mandie responded that, yes, ITS will be looking for ambassadors from a mix of users (RAs, RAAC committees, researchers, etc.).

Teresa asked if there is a plan to talk with faculty. Many of them were pushed to use M-Reports through policy and they need to have a real-time financial tool that is easily understood by them. Patrick responded that there will be a faculty component in this plan and that will be a big part of the change management. Teresa followed up by asking if reports are not being homed in one place, this may cause issues for faculty. Right now, for those that monitor their finances, they appreciate having one location for all of their data reports. Patrick mentioned that they will work with faculty and find the most efficient ways of delivering data.

Danielle asked if ITS is keeping an open mind about other tools and if we are working to understand what our peer institutions have done in this respect. Patrick responded that ITS has not looked at new tools. Tableau is the top used tool now and Power BI is a close second. However, ITS is open to exploring other tools as needs are clarified.

Kathy D. asked about the expectations for how long this new system will be sustainable, since we have gone through this numerous times with other applications. Mandie answered that when ITS builds logic into an application, it makes it antiquated quite quickly. Mandie does not anticipate looking at something new for another 10-15 years after this version.

### 3. **Presentation:** RAAC Communications Subcommittee Update (*Cathy Liebowitz*) Attachment #2

Cathy Liebowitz presented the RAAC Communications update.

#### Membership:

Since the last update, we have welcomed two new members to the group – Christy Bohensky from ORSP, and Jim Jarvis from Michigan Medicine.

### Accomplishments:

- **RAN Meeting:** Hosted the May 2023 RAN meeting with Jennifer Huntington presenting RAAC Metrics on-line tools for RAs. There were 288 attendees with 67 views of the YouTube video after-the-fact. There was a dip in attendance in February 2022 and we made some revisions to how we communicate the meetings through different announcements and reminders.
- **Slack RA Forum:** There are 491 members, and the Forum is used to help RAs with assistance seeking, posting RA positions, shout-outs to colleagues, RAAC messages (sharing RAAC Metrics tools, DEI workgroup, RAN meetings, etc.), and informal networking. Additionally, there are multiple channels emerging: Ask-an-RA and for new Research Administrators.
- **21 Questions:** We conducted four interviews in 2022 – Sally Sivrais, Carolyn Pappas, Angie Skellie, and Donelle Goertliz. We conducted two interviews in 2023 – Samantha Cerpa and Rick Wintergerst. You can check out the 21 Questions interviews on the RA Forum on Slack **#21Questions**.
- **Virtual Networking:** We completed three pilot sessions in Summer 2022 – Research Administration as a Profession (63 participants); RAAC: Who, What, Why and How (42 participants); RA Professional Associations (38 participants). Additionally, we conducted sessions focused on RA Tools and Business Objects (66 participants), Academic vs. Calendar Year Effort (82 participants), Meet & Greet with Sponsored Programs (57 participants), GSRA Appointments (84 participants).

### **Ongoing Work:**

- RAN Meeting: Planning the October 26, 2023 RAN Meeting. COGR is in conflict with the date we selected so looking at new dates.
- Virtual Networking:
  - June 27, 2023: How to use the RA Forum on Slack.
  - July (date TBD): GSRA Appointment How Tos
  - Future topics: Meet & Greet with ORSP
- Research Administrator Day 2023 (September 25)
  - Looking to share messages from President Ono, VP Cunningham, and AVP White.
  - Developing e-cards for faculty to send to RAs in recognition of Research Administration Day.
- 21 Questions with the RA Community: Continue to work on 21 questions with the RA community. Feel free to nominate someone to be interviewed.
- Web Page Review: Assist with organizing information to better highlight RAAC and its accomplishments, continue consistency checking, and providing feedback.
- Collaborate with RAAC-DEI Workgroup.

Please spread the word about the Virtual Networking Sessions to your group, and encourage your team to post questions on Slack. Kathy D. thanked everyone who participated in the Virtual Networking sessions.

#### 4. **RAAC Training Chair Update** (*Chris DeVries*)

Chris let the group know that the search for the RAAC Training Chair Co-Chair is nearing completion. Chris and the RAAC Chairs met with the prospective candidates and provided a recommendation to Shandra White and Debbie Talley. We have one item to confirm before we

can make an announcement, but Chris expects that will happen in the next few weeks. The transition date of the Chair positions will most likely be July 15, 2023, and Chris will notify the RAAC committees.

## 5. **Sponsored Programs Update** (*Debbie Talley*)

NIH: There is a push from NIH to get reports submitted on time. They are going to be enforcing when we can receive payment due to getting reports in on time. When the Reporting Team is reaching out for reports, they are doing so to help us all remain compliant. Please help us get them in on time.

Foreign Subcontracts: Looking at what a solution is for the university. Working with COCR. More to come. Kathy D. asked if submission of the final technical report impacts this. Debbie answered that NIH is focused more on the financial aspects of this right now.

## 6. **ORSP Update** (*Andrea Anderson*)

### Staffing:

We originally posted four Project Representative (PR) positions but we were only able to fill one of them. We have reposted four positions – two Private Team PRs, one Government Team PR, and one DUA Team PR. We are also pleased to announce an internal promotion – Elaina Wiggins from the Support Staff has filled the one Private Team PR roles.

### New Staff Postings:

- Support Staff (replacing Elaina Wiggins)
- New Project Manager position opening.

### Sponsor Updates:

**NIH Carry-forward Prior Approval** – NIH is getting more stringent with carry-forward funds needing prior approval. When you do not have automatic carry-forward you need to obtain approval before you spend the carryforward funds. It needs to come to ORSP if prior approval is needed.

**NIH DMS Plans** – NIH has provided additional [sample DMS Plans](#) as examples of how a DMS Plan could be completed in different contexts on their website.

**NASA/NSPIRES** – Please do not use the NSF fillable PDF to report Current & Pending to NASA. It reverts to an editable format where accidental changes could occur when it is under NASA review.

**Department of Energy** – Has implemented their new risk assessment and has not shared the algorithm. We are hearing that several institutions have been receiving notices asking for individuals not to participate as an investigator on a new award. This does not mean the individual has done anything wrong. If you receive such a request from DoE, contact ORSP immediately. They have a very short turnaround time.

**Huron Consulting** – ORSP is utilizing temporary help from Huron Consulting and they are working on the Private Team to help with proposal submissions. You may see new names on proposals. Please let Andrea know if you have any issues.

**NIH Annual RPPRs** – Please do not route an ACR for NIH annual RPPRs (only NIH interim and final RPPRs should be routed on an ACR). These are not handled by the PRs but support staff. It is done by posted comment and will let you know who will be handling the RPPR.

**OVRP Updates:**

- OHRP Research Community Program - Join the research community forum titled Making a difference in human subjects research: Empowering participants, engaging communities, and protecting data is on September 26-27, 2023.
- Environmental Health and Safety Group – Will now identify and report repeat deficiencies.

7. **ITS Update** (*Carolyn Pappas*)

The next system release is July 24, 2023, and will be a routine release with one larger update for automation of PEERRS compliance. The system will do the evaluations of PEERRS course certification. There are visual changes in the Award record as well as email notifications that will be sent as well. Additionally, there will be a small SF424 update from the vendor but it will not affect you. Kathy D. asked if the new PEERRS compliance email will only go to the PI and non-compliant personnel? It will not go to the non-compliant personnel, only the PI and the Primary Research Administrator receive the email notifications.

8. **Matters Arising** (*All*)

Chris let everyone know that there is a bulk discount package option available for those who would like to attend the NCURA National Meeting in August. Chris is preparing a Google Form to send out to see who is interested. What will it mean for registration? The bulk discount is only for the NCURA members registration fee and will not include workshops. You will need to sign up/pay for workshops on your own. Email Chris DeVries with any questions.

9. **Closing and Future Meetings** (*Debbie Talley*)

The meeting ended at 4:10 p.m.

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RAAC Committee-At-Large Meeting Dates (*all meetings 3:00-4:30 p.m., unless otherwise noted*)

- *No July 2023 meeting*
- *No August 2023 meeting*
- Tuesday, September 19, 2023 (*Jennifer Huntington, RAAC Metrics Subcommittee Update*)

Executive Committee Meetings (*all meetings 3:30-5:00 p.m., unless otherwise noted*)

- Tuesday, June 13, 2023
- Tuesday, July 11, 2023
- *No August 2023 meeting*

# MReports Project

## Modernize, Replace, Retire

### *Project Overview for RAAC*

June 20, 2023 | Presenters: Patrick Franklin and Mandie Chapman



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## What?



Our goals in presenting are to **raise awareness** of the upcoming major service change to MReports and to **request feedback** on our proposed security model changes for Financial Research Reports



MReports connects to our [Enterprise Data Sets](#) such as HR, Student, Financial, Donor & Alumni Relationship Tool (DART), eResearch, and many others. It is currently used by all academic campuses and Michigan Medicine.



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# Why?



## Modernize:

- Light User Interface enhancements - accessibility & U-M branding



## Replace and Retire:

- The MReports underlying technology is outdated and unsupported
- Rehome reports into those modern technologies
- We anticipate the majority of reports will move to Tableau



## Data Security

- Shifting in the direction eResearch and many other platforms are moving towards a more open and modern security model



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# Our Promise



We do not know all the ways in which you rely on MReports but we promise to listen, to stay flexible in our approach, and to build a solution together that can be responsive as your data needs change.

We need your help, your input, and your trust to make a better product. There will be some learning curves for all of us.



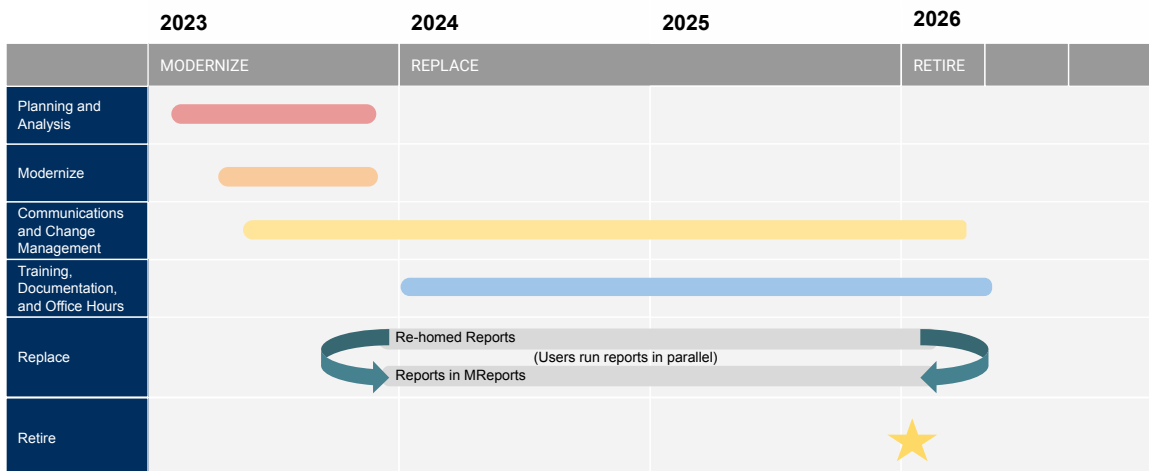
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# Modernize, Replace, Retire Overview

The overall project goal is to migrate reports to replacement solutions over the next 18-24 months. MReports will run in parallel for a period of time before it is retired, at a date that has yet to be determined.

Planning and Analysis	There are ~130 reports within MReports. Report usage and use cases will be analyzed and a detailed replacement plan will be developed.
Modernize	User Interface Development, Testing, and Rollout to End-Users
Communications and Change Management	An Audience Analysis was performed and a comprehensive Communications and Change Management Strategy will be developed.
Training, Documentation and Office Hours	We will support end-users through the change through 1:1 support sessions as well as webinars / training
Replace	Data infrastructure will be developed and reports will be migrated. End-users can run reports in parallel to test their business processes.
Retire	MReports will be retired at a future date that has yet to be determined

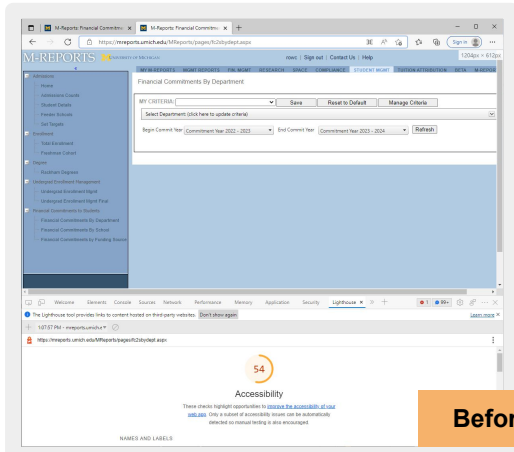
# High-Level Timing



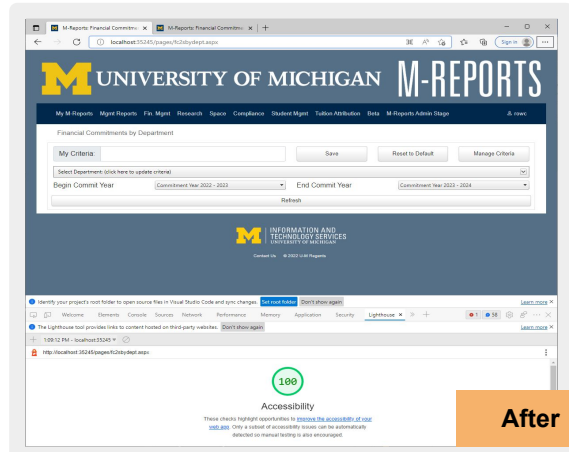


# Modernize: User Interface

**Accessibility Benefits:** Moving the MReports User Interface to a more supported framework increases the accessibility score. **Usability Benefits:** More page real estate and updated color scheme while maintaining core functionality.



Before

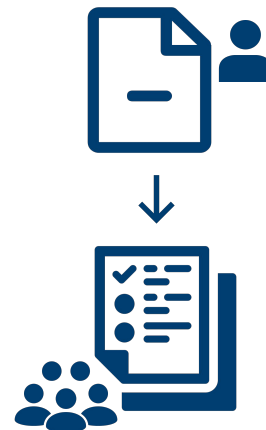


After

# Modernize: Data Security

**Proposal:** Bringing reports into the same modern 'data campus' we use for data security and data set access granting in the replacement solutions

The current view is limited to a single user and their specific data; the proposed future solution is at the department level



# Modernize: Data Security

## Benefits



Easier to maintain and modify



Increases transparency



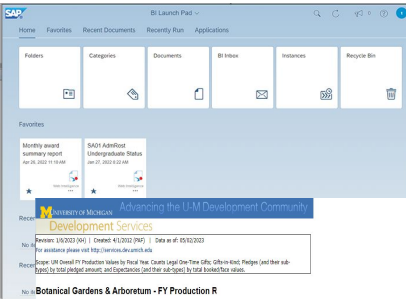
All dataset access requests are tracked through ITS



Removes delegation process

# Replace: Replacement Solutions

## Business Objects



## Datamart(s)



## Tableau

**Combined Activity Report- IQ**  
Test of a Tableau Combined Activity Report

Measure	Actual	Forecast	Actual	Forecast	Actual	Forecast	Actual	Forecast	Actual	Forecast	Actual	Forecast	Actual	Forecast	Actual	Forecast
Revenue	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000
Expenses	50,000	50,000	50,000	50,000	50,000	50,000	50,000	50,000	50,000	50,000	50,000	50,000	50,000	50,000	50,000	50,000
Profit	50,000	50,000	50,000	50,000	50,000	50,000	50,000	50,000	50,000	50,000	50,000	50,000	50,000	50,000	50,000	50,000

FY	Giv		Commitments		Expenses		Expense Grants		Production Total	TOTAL TOTAL (Giv + Com + Exp + Grants) with Production
	Unexpended	Revised	Unexpended	Revised	Unexpended	Revised	Unexpended	Revised		
2020	308,000.00	34,500.00	200,000.00	200,000.00	200,000.00	200,000.00			200,000.00	600,000.00
2021	800,000.00	25,500.00	300,000.00	300,000.00	300,000.00	300,000.00			300,000.00	1,100,000.00
2022	1,800,000.00	80,500.00	500,000.00	500,000.00	500,000.00	500,000.00			500,000.00	2,900,000.00
2023	400,000.00	20,000.00	100,000.00	100,000.00	100,000.00	100,000.00			100,000.00	600,000.00

# Retire

We will retire MReports after all reports and functionality have been replicated and users have had a period of time to use the system in parallel.

We are targeting late 2025 for the final retirement but a date has not yet been set.

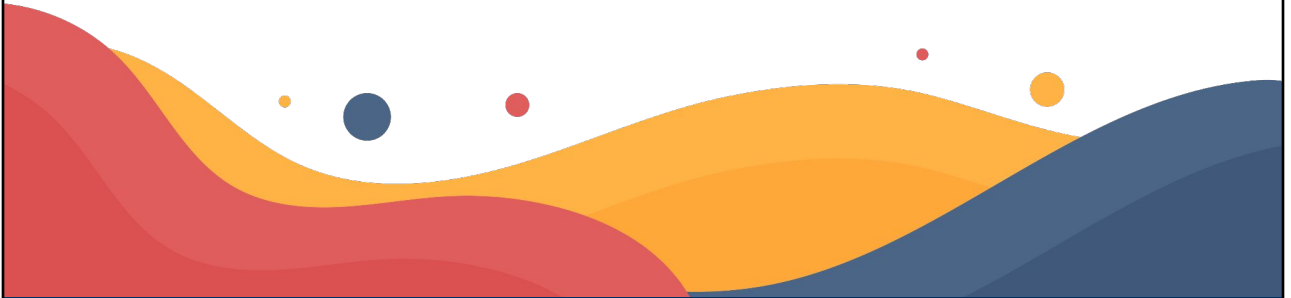
# Next Steps



[its-mreportsproject@umich.edu](mailto:its-mreportsproject@umich.edu)

# Questions?

Contact us: [its-mreportsproject@umich.edu](mailto:its-mreportsproject@umich.edu)



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# RAAC Communications Update

RAAC Committee-At-Large

**Cathy Liebowitz**

Research Administration Sr. Manager, ISR

June 20, 2023



## Communication Subcommittee Charge



The RAAC Communications Subcommittee seeks to:

- **Identify and assess the communication methods** currently used at U-M for research administration
- **Work to develop improved systems** that support robust, consistent and effective communications within the research administration community
- **Recommend best practices** by topic, purpose, and/or method
- **Facilitate and foster communications to and among research administrators including planning and execution of** Research Administrators Network (RAN) meetings



## Communication Subcommittee Members

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

*\*One new member, Christy Bohensky, since last update to RAAC CAL in February 2023*



## Accomplishments Since February, 2023

- Hosted May 2023 RAN
- Continued to grow Research Administration Forum on Slack
- 21 (or more) Questions with an RA community member interviews
- Virtual Networking Sessions in March and April 2023

# Research Administrators' Network (RAN) Meetings - Wednesday, May 17, 2023



- Topics:**
- RAAC Metrics On-Line Tools for Research Administrators
  - Updates

**Attendees:** 288 attendees – virtually

**Emcee:** Jennifer Huntington

**YouTube:** 67 views so far



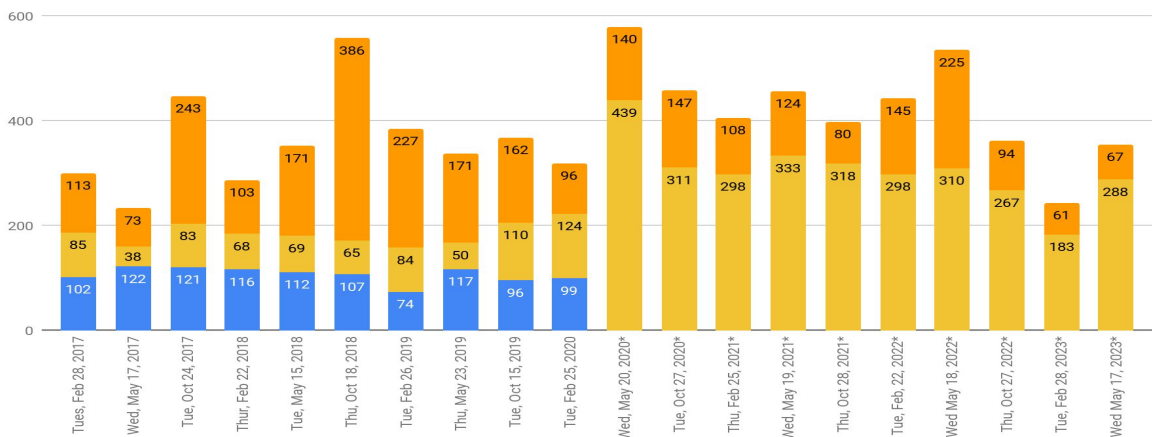
Agenda and presentations are posted on the RAN webpage:

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

## RAN Meetings: The Numbers



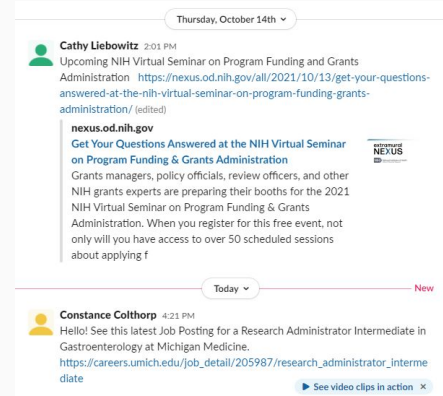
**Total RAN Attendees per Meeting: In Person (Blue), Remote (Gold), YouTube (Orange)**





# Research Administration Forum – Slack

- 491 members as of 6/16/2023
- Traffic patterns we hope to sustain
  - Assistance seeking
  - Postings for RA positions
  - Kudos/Shout outs to colleagues
  - RAAC message boosting (e.g., DEI workgroup, RAN meetings, subcommittee messaging, etc.)
  - Sharing RAAC Metrics tools
  - Informal networking
- Multiple Channels Emerging
  - Ask-an-RA
  - New Research Administrators



## 21 Questions

### 2022 Interviews:

- Sally Sivrais, PM&R
- Carolyn Pappas, ITS EAS Research
- Angie Skellie, OVPR
- Donnelle Goerlitz, PM&R

### 2023 Interviews:

- Samantha Cerpa, ISR
- Rick Wintergerst, Engineering

You can check them out on the RA Forum on Slack **#21Questions**





# Virtual Informal Networking

## Completed Sessions:

- Research Administration as a Profession (Pilot, June, 2022; 63 participants)
- RAAC: Who, What, Why, and How (Pilot, July, 2022; 42 participants)
- RA Professional Associations (Pilot, August, 2022; 38 participants)

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- RA Tools and Business Objects (December, 2022; 66 participants)
- Academic vs Calendar Year Effort (January, 2023; 82 participants)
- Meet & Greet with Sponsored Programs (March, 2023; 57 participants)
- GSRA Appointments (April, 2023; 84 participants)



# Ongoing Work:

## RAN Meeting Planning

- *Thursday, October 26, 2023 - **date change** pending due to COGR conflict*
  - We invite President Ono and AVP White to address the RA Community at an upcoming RAN.

## Virtual Networking - Planned Sessions (Jamboards coming soon!)

- June 27 2023: How to Use the RA Forum on Slack
- July date TBD: GSRA Appointment How Tos
- Future Topics: Meet & Greet with ORSP, Collaborations with Navigate
- *We invite all RAAC members to join the networking discussions*

## Research Administrator Day 2023 (September 25)

- We invite President Ono, VP Cunningham, and AVP White to share video messages recognizing the work of the RA community
- We are developing e-cards for faculty to send to RAs in recognition of Research Administrator Day

## Ongoing Work



**21 Questions with the RA Community** - We hope you will say *YES!* When we ask you to participate. And, please feel free to nominate someone to be interviewed.

**Web Page Review** - assisting with organizing information to better highlight RAAC and its accomplishments, continue consistency checking, and providing feedback

**Collaborate with RAAC-DEI Workgroup**

**Let us know if we can help!**

## Announcements



- We'd appreciate your help in spreading the word about the Virtual Networking Sessions
- Encourage your teams to post questions or requests for tools and resources on Slack

Questions?

