

2016 BRINGING ADMINISTRATORS TOGETHER CONFERENCE

# START myResearch – PI Portal 2.0

April 14, 2016

**UIC** UNIVERSITY OF ILLINOIS  
AT CHICAGO

**UIC**

Lincoln Hall

707 South Morgan Street

## Workshop Presenter(s)

Name: Chris Bland

Title: Enterprise System Specialist

Contact Information: [crbland@uillinois.edu](mailto:crbland@uillinois.edu)

## Please ...

- Turn off cell phones.
- Avoid side conversations.
- Ask questions at any time.
- Sign the attendance roster.
- Complete the evaluation at the end of the workshop.

## Workshop Objectives

- Understand the overall objective, scope, and roadmap of the START myResearch Project.
- Understand detailed PI Portal roadmap, as a subset of START myResearch Project.
  - Key enhancements expected in 1H2016.
  - Demonstration.
- Start using PI portal, in lieu of Ui-eRA (InfoEd), to access proposal data.

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## START myResearch Overview

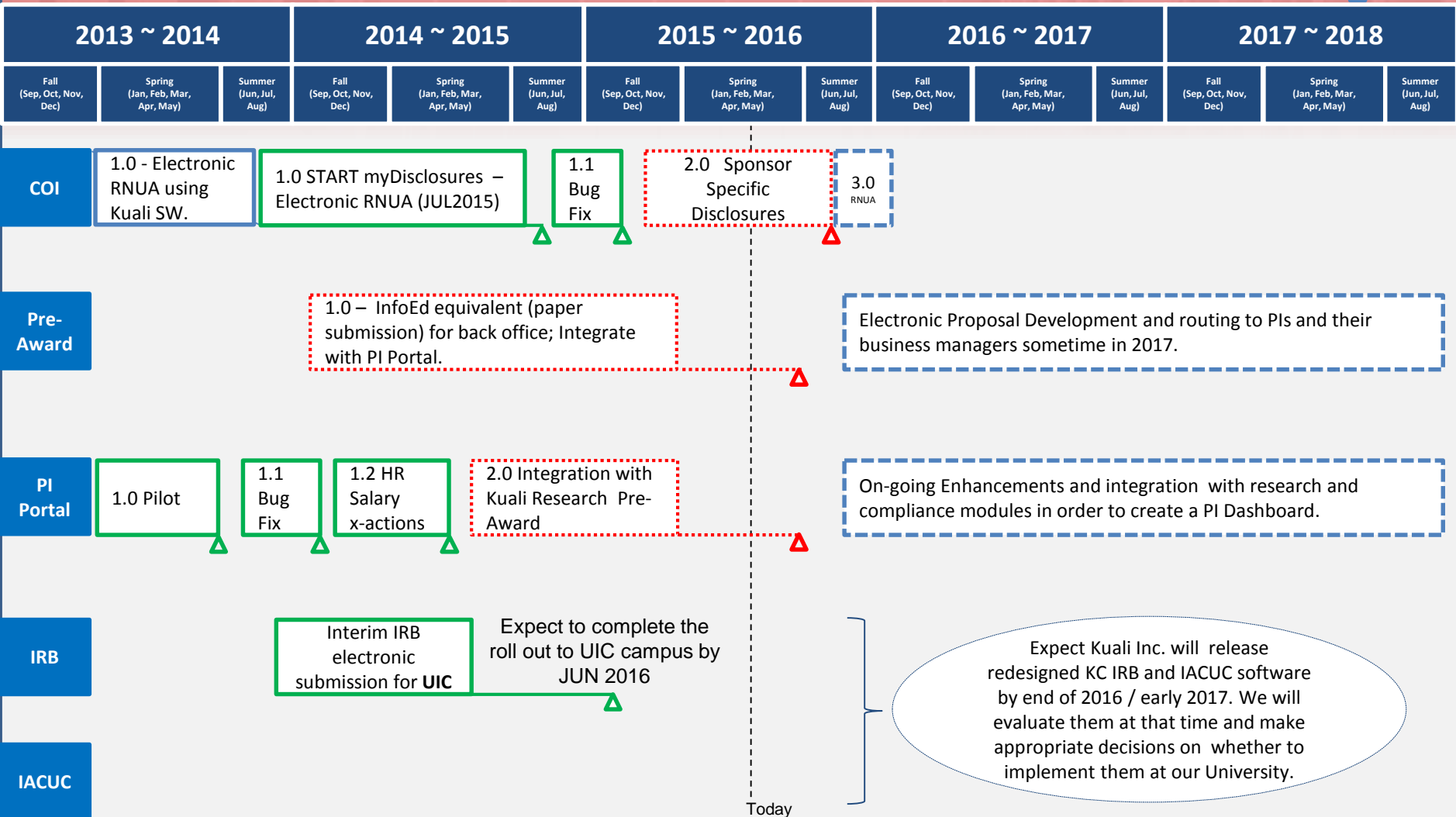
- Purpose:
  - Replace outdated electronic research administration software to better manage ~\$970M\* Research Portfolio.
  - Convert paper-based systems and processes to electronic systems.
- START (System-wide Tools for Administration of Research and Training)
  - Pre-Award / Grants Management
  - COI
  - IRB
  - IACUC
- myResearch = Principal Investigator Portal (PI Portal)
  - Central point for faculty members and staff to access information regarding grants, including summary financial data.
  - Display compliance and other information going forward.

### **Benefits:**

- Enable research administrations to efficiently serve and maintain a large and complex sponsored research portfolio.
- Reduce faculty burden and effort.
- Simplify Compliance.
- Drive consensus best practice business processes for University-wide IT support.

# START myResearch Project - Overall High Level Roadmap

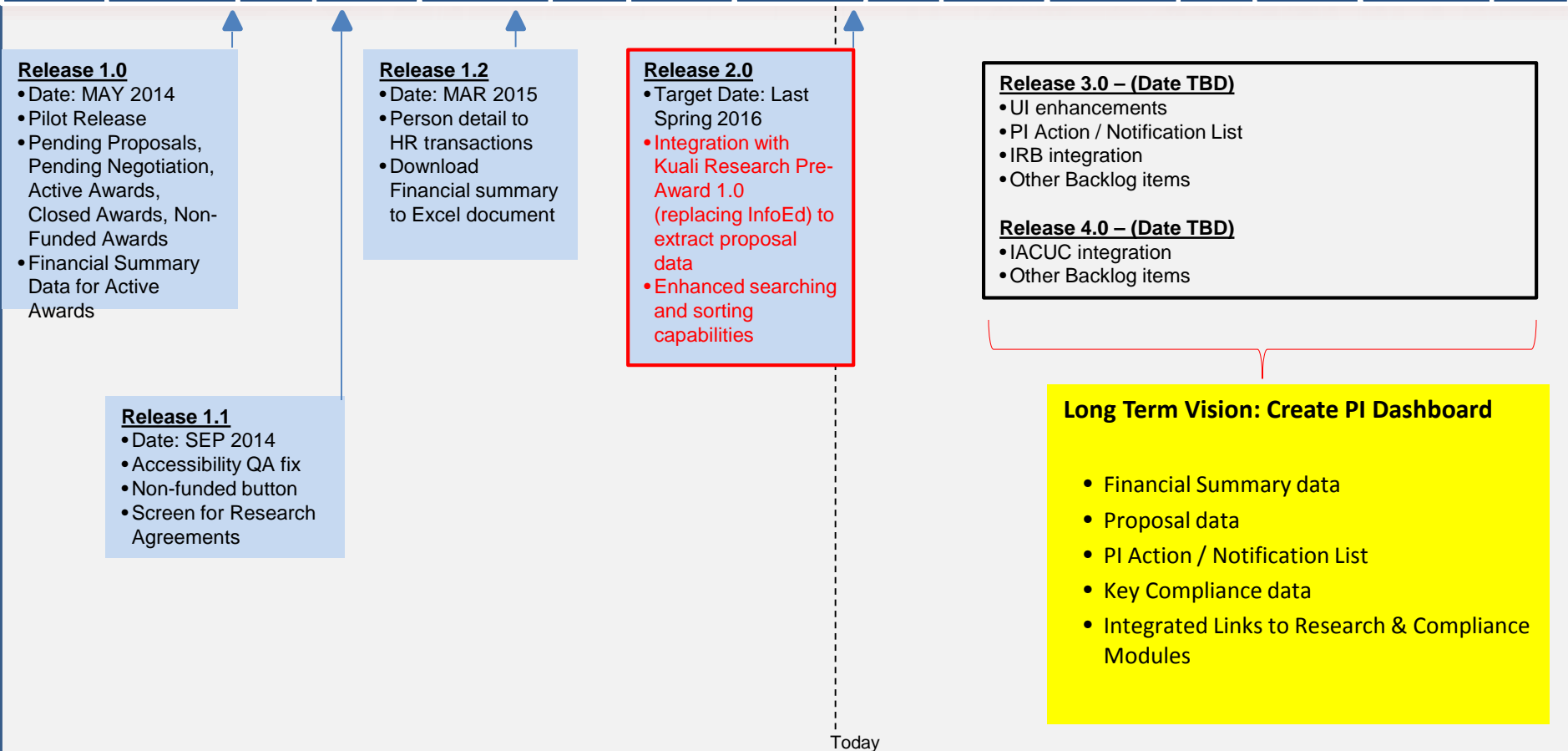
▲ Release



# myResearch (PI Portal) - Detailed Roadmap

▲ Release

2013 ~ 2014			2014 ~ 2015			2015 ~ 2016			2016 ~ 2017			2017 ~ 2018		
Fall (Sep, Oct, Nov, Dec)	Spring (Jan, Feb, Mar, Apr, May)	Summer (Jun, Jul, Aug)	Fall (Sep, Oct, Nov, Dec)	Spring (Jan, Feb, Mar, Apr, May)	Summer (Jun, Jul, Aug)	Fall (Sep, Oct, Nov, Dec)	Spring (Jan, Feb, Mar, Apr, May)	Summer (Jun, Jul, Aug)	Fall (Sep, Oct, Nov, Dec)	Spring (Jan, Feb, Mar, Apr, May)	Summer (Jun, Jul, Aug)	Fall (Sep, Oct, Nov, Dec)	Spring (Jan, Feb, Mar, Apr, May)	Summer (Jun, Jul, Aug)





# myResearch PI Portal 2.0 - Scope and Demonstration

- Target Date: Late Spring 2016.
- Software: Internally Developed by AITS
- Scope:
  - Source Proposal data from Kual Research instead of InfoEd.
  - Enhance filtering and searching.
  - Improve usability for Unit administrators and Business managers

The screenshot displays the myResearch Portal interface. At the top, there is a navigation bar with the University of Illinois logo, the text 'myResearch Portal', and icons for 'PORTFOLIO', 'HELP', 'SEARCH', and 'LOG OUT'. Below the navigation bar, a welcome message reads 'Welcome, Youngwook'. The main content area is divided into two sections: 'PERSONAL RESEARCH PORTFOLIO' and 'ADMINISTRATIVE RESEARCH PORTFOLIO'. Each section contains a grid of colored boxes representing different categories of research data, such as 'Proposals', 'Active Agreements/Awards', and 'Active Subagreements/Subawards'. The 'PERSONAL RESEARCH PORTFOLIO' section shows counts for various proposal stages and agreement statuses. The 'ADMINISTRATIVE RESEARCH PORTFOLIO' section shows counts for similar categories. A 'Current and Pending Support' section is also visible, along with a link to 'People who can view my portfolio'.

PERSONAL RESEARCH PORTFOLIO		ADMINISTRATIVE RESEARCH PORTFOLIO	
Proposals	Active Agreements/Awards	Active Agreements/Awards	Active Subagreements/Subawards
Central Office Review (4) Pending with Sponsor (0)	Awarded (0) Non-Funded (0)	Closed Agreements/Awards (0)	Closed Subagreements/Subawards (0)
Current and Pending Support		All	

## Roles Access to PI Portal 2.0

- Current Portal Setup

- Access for Business Managers is based on Home Org
  - Example: A Business Manager for Engineering will see ALL RECORDS for a PI or CO-PI who has Engineering as their home org
- Access for Delegates is Person-to-Person
  - Example: A delegate of an individual will see ALL RECORDS where that individual is a PI or CO-PI

- Portal 2.0 Access

- Access for Business Managers is based on Primary Org of the document
  - Example: A Business Manager for Engineering will see ALL RECORDS where Engineering is the Primary Org on the Proposal or Grant
- Access for Delegates is Person-to-Person
  - Example: A delegate of an individual will see ALL RECORDS where that individual is a PI or CO-PI

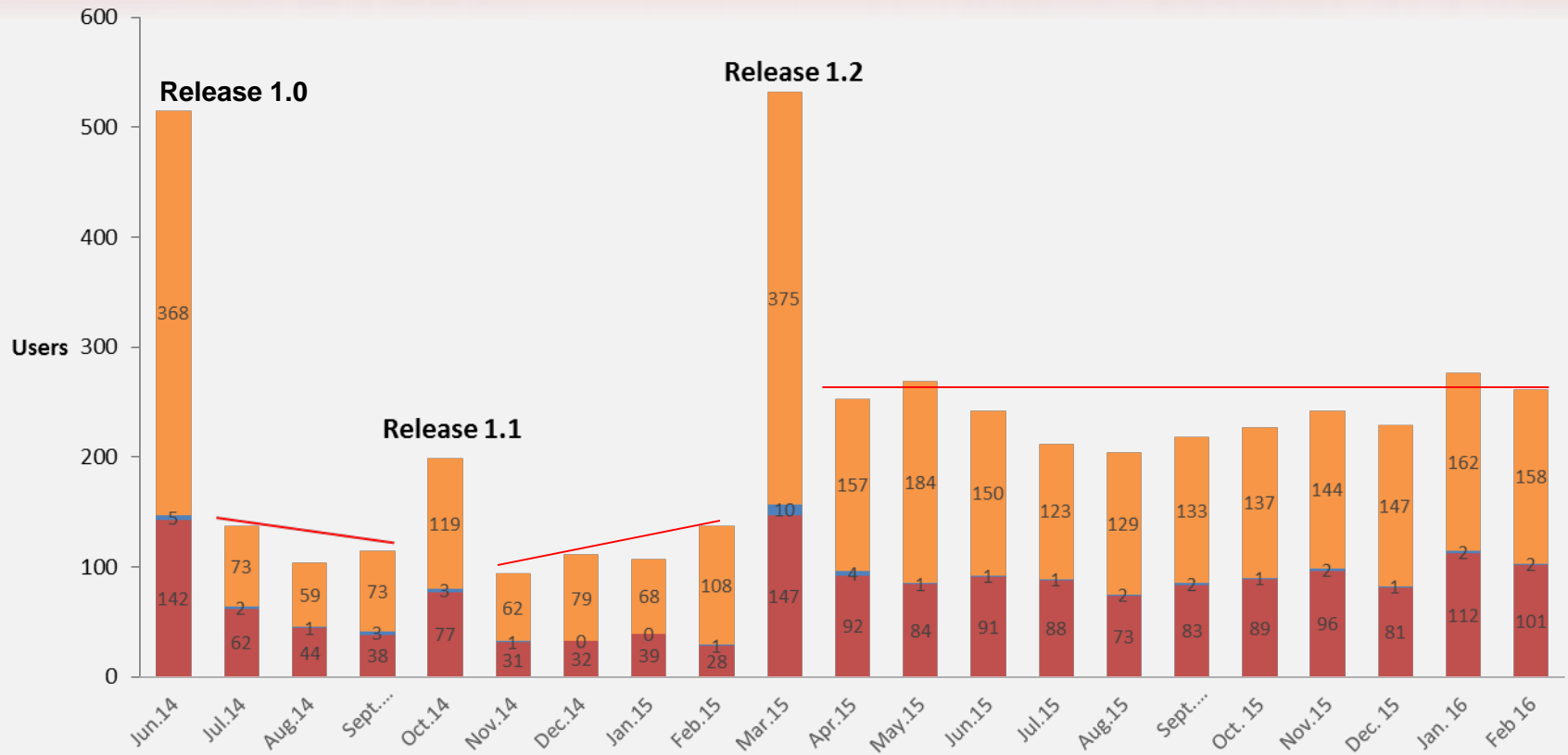
## Roles Access to PI Portal 2.0

- Current Portal Setup
- Portal 2.0 Access
- Current and Pending Support Report
  - Report will return all proposal and grant information associated with the selected PI or CO-PI
- Current and Pending Support Report
  - Report will return all proposal and grant information associated with the selected PI or CO-PI

# myResearch (PI Portal) Usage Statistics

## Monthly unique users by campus

Chicago Springfield Urbana



# myResearch & My-UI-Financials

## myResearch:

Central point for both faculty and staff to access information related to sponsored research.

## My UI-Financials:

Interactive Access for Business Managers and faculty to financial information pre-filtered based on Role App entries

Portal to display proposal, award, protocol, and financial data for grants.

Summary  
Financial  
data for  
grants

Dashboard to display financial information for all types of funds. Ability to drill down to select standards reports.

## Thank You!

- START myResearch Website
  - [http://web.uillinois.edu/start\\_myresearch/](http://web.uillinois.edu/start_myresearch/)
- myResearch (PI Portal)
  - <https://myresearch.uillinois.edu/piPortal/>

Questions / Concerns?