OSRAA Outreach Series

June 20th, 2024

We will begin in a just a few minutes.
Welcome

• Greetings and welcome to the OSRAA Outreach Series! My name is Kacey Parks, and I am the Research Administration Training Coordinator.

• This session is being recorded, and you will be notified via the OSRAA Outreach Listserv when the recording and presentation are ready to view.

• Chat is disabled. Please submit all questions via the Q & A button located at the bottom of your screen. Questions are encouraged to be submitted as they come to mind, and will be answered at the conclusion of our presentation today.

• Please note that when you submit a question in the Q & A, the question and your name will be visible to all participants unless you select “anonymous” before submitting it.
Reminder

• This is the last OSRAA Outreach for the fiscal year. We are taking a break for the summer and will resume in the Fall.

• We will announce our Fall schedule and topics near the end of the summer via the OSRAA Outreach listserv.
Looking Closer at Research Data and Core Reports

OSRAA OUTREACH
JUNE 20, 2024

JESSICA THURNER-BYERS- GRANT AND CONTRACT ADMIN/BUSINESS SYSTEMS ANALYST
KRISTAL FEHRING- DIRECTOR OF RESEARCH SYSTEMS, DATA OPERATIONS, AND INNOVATION
MARK BIERLY- SENIOR BUSINESS SYSTEMS ANALYST
Agenda

• Introductions to the team
• Scope
• Definitions
• System Limitations
• DRI Website
• CORE Reports
• Jaspersoft
• Resources
DRI: Data and Systems Team

- The Data and Systems Team is part of the Research Administration, Operations and Finance area of the Division of Research and Innovation (DRI)

- The Data and Systems Team includes:
  - Kristal Fehring – Director of Research Systems and Data Operations
  - Mark Bierly – Business System Analyst
  - Jessica (JT) Thurner-Byers – Grant and Contract Administrator/Business System Analyst
  - Chad Cropley – IT Consultant
  - LaRae Wallace – Finance and Operations Fiscal Coordinator
Scope of Research Data

- OSU Advantage
- Office of Research Integrity
- Office for Research Advancement
- Research Centers & Institutes and Core Facilities
- Office for Sponsored Research and Award Administration (OSRAA)
Life Cycle of a Grant

1. Project Development
2. Identify Funding
3. Proposal Preparation
4. Proposal Submission
5. Award Acceptance
6. Project Start Up
7. Award Management
8. Award Closeout

Post-Award

Pre-Award
Definition: Proposals

Proposals approved and submitted to sponsor for consideration of award.
Definition: Awards

Incoming awards (grant, contract, or incoming subaward) that have been received, negotiated, and signed by OSU and sponsor and is processed through OSRAA for management.

• This includes new awards, award modifications, and award deobligations.

• Nonfunded agreements are not included in this number.

• Award amounts are the obligated amount by a sponsor.

• Award numbers are counted as “set up” when the budget is entered into Banner not based on when revenue is received and applied to the award.

• Active Awards are current projects that are open.
Expenditures: Costs related to awards and posted to award indexes. Expenses are made up of many different categories that are then reported on accordingly. Expenses happen after an award is executed and setup in Banner. Once expenses have been incurred, the sponsor is invoiced to bring in revenue.

OSU Research Expenditures: Expenditures reported based on OSU’s definition of research expenditures that includes expenditures on restricted funds. Restricted funds include: Federal Funds, State of Oregon Funds, Other Government Funds, Private Funds, Foundation Funds.

NSF HERD Expenditures: Expenditures reported based on definition of R&D expenditures in 40 fields of R&D according to the National Science Foundation (NSF).
System Limitations

Research systems not integrated to other systems
Manual data entry and maintenance
Systems having limitations on what data you can get out of it
Multiple versions of a software with differing elements
If the data is available, it doesn’t come out in a ready to present report
DRI Website

• https://research.oregonstate.edu/
• https://research.oregonstate.edu/about
• https://research.oregonstate.edu/statistics
  • Reporting for Proposals, Awards and Expenditures
  • Updated Monthly after month-end close
• https://research.oregonstate.edu/osraa/AwardStatus
  • Daily Award Status Update
Looking closer at the CORE Reports
RES0010 – Proposal Data

<table>
<thead>
<tr>
<th>Cayuse Data Ad Hoc Lite (RES0010)</th>
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<tbody>
<tr>
<td>1) Proposal Number (accepts %)</td>
</tr>
<tr>
<td>3) Sponsor (accepts %)</td>
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<tr>
<td>5) Award Admin Dept Code (accepts %)</td>
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<tr>
<td>7) Research Team Last Name (accepts %)</td>
</tr>
<tr>
<td>9) Research Team Role</td>
</tr>
<tr>
<td>11) Third Party Cost Sharing &gt;=</td>
</tr>
<tr>
<td>13) Animal Subjects</td>
</tr>
<tr>
<td>15) Biological Hazards</td>
</tr>
<tr>
<td>17) Materials provided by sponsor/other party</td>
</tr>
<tr>
<td>19) Small Business Innovative Research (SBIR) Program</td>
</tr>
<tr>
<td>21a) Approval Start Date Range</td>
</tr>
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Report Description

Cayuse proposal data ad-hoc lite report
RES0008 – Award and Expenditure Data

Report Description

Research and Grant Activity by College (Responsible Organization) and Fiscal Year. Grouped by FY, Org, Grant Type, and Agency. Parameters are Fiscal Year (single select), College/Dept (multi select), Orgs (multi select), F & A Only (Y/N), Agency/Sponsor Name (multi select) and PI Name (multi select).
DDB5201 – Research Dashboard with Proposals, Awards, and Expenditures
DRI
Recommended
CORE Reports
If you have access to Jaspersoft – Grants, then you will be able to pull data on Awards and Expenditures.

Be aware that DRI uses Index ORG Codes to categorize by College and Unit not the Grant ORG Code.

We recommend checking your numbers to our website numbers to confirm that the report is pulling the correct data due to all the elements available in Jaspersoft.
Resources

• Data Request Form from DRI Website: https://research.oregonstate.edu/webform/online-data-request

• Shared email for the Data and Systems Team: DRI.Data@oregonstate.edu
A Special Thank You!!

• UIT Data Team

• JT and Mark! *DRI Data and Systems Team*

• Lisa Silbernagel, *Associate Director for Research Administration and Accounting Controller’s Office - Financial Strategic Services*

• DRI Leadership
Questions?