May 16, 2017

RAS Reports Kick-Off

Agenda

- Welcome
- Introductions
- Background
- Planned Reports
- Roll-Out Plan
- Financial Outlook Reporting Tool
- Roles & Responsibilities
- Next Steps
- Faculty Financial Summary
- Sponsored Projects Dashboard

Background

In Summer 2016, the Office of Finance Systems and Data Analytics (OFSDA) was engaged by the RAS leadership, the RAS unit Chief Business Officers, the RAS Task Force (representing the University Faculty Council (UFC)) and the School of Medicine Business & Finance leadership to consider ways to address inefficiencies in data access, reporting and projections.

As a result of the feedback obtained from working sessions with RAS Task Force representatives and other faculty, OFSDA agreed to focus on three areas:

- (1) the development of a *consolidated financial view for faculty* with minimal clicks and a focus on what faculty need to know
- (2) *reduction of manually intensive tasks on RAS staff* to allow them additional capacity to support faculty and
- (3) *improved metrics* to track accountability in meeting agreed-upon services for faculty.

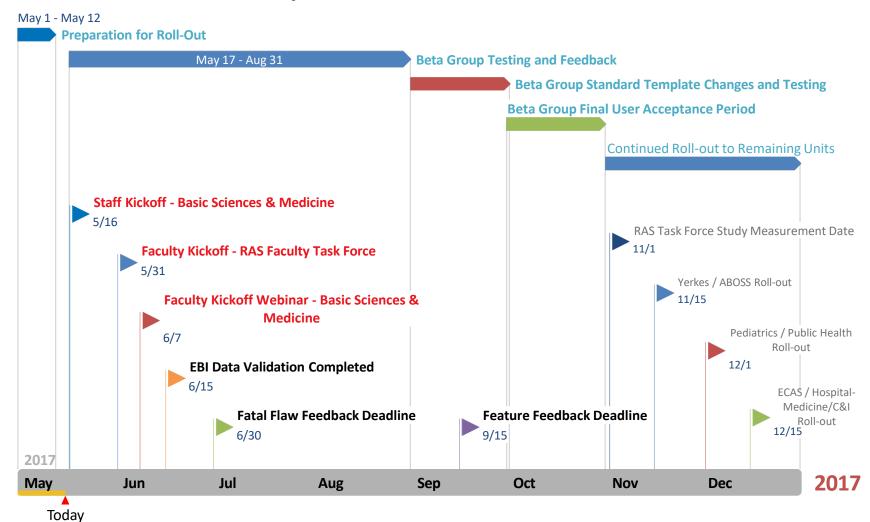
Project Overview

Planned Reports & Timing

Project / Analysis	Key Stakeholders	Target Dates	Status			
Current Release to Beta Groups						
1 - Faculty Financial Summary	Faculty	Released - EBI	Released			
2 - RAS Reconciliation Worksheets with labor and non-labor projections	Faculty, RAS	May 16, 2017 (FinPro POC)	On Track			
3 - Sponsored Projects Dashboard	RAS & CBO's with RAS	May 16, 2017 (EBI)	On Track			
Future Development						
RAS Metrics	RAS	June 15, 2017 (FinPro POC)	Not Started			
Financial Summary	CBO's & Department	June 30, 2017	Not Started			
(for Non-Faculty Use)	Administrators	INOT				
ART Tool	RAS / FGC	June 30, 2017 (FinPro)	Not Started			
PACT Tool	RAS / FGC	July 31, 2017 (FinPro)	Not Started			
CAS Exception Tool	Research CBO's / Designees	August 31, 2017 (FinPro)	Not Started			

^{*} The EBI-Finance application is live in Production, but the usability by faculty depends on when project assignments are provided by departments. As assignments are loaded, the reports will be usable by the assigned faculty.

Roll-Out Plan – Key Dates



Timeline: 05/01/2017 - 12/31/2017

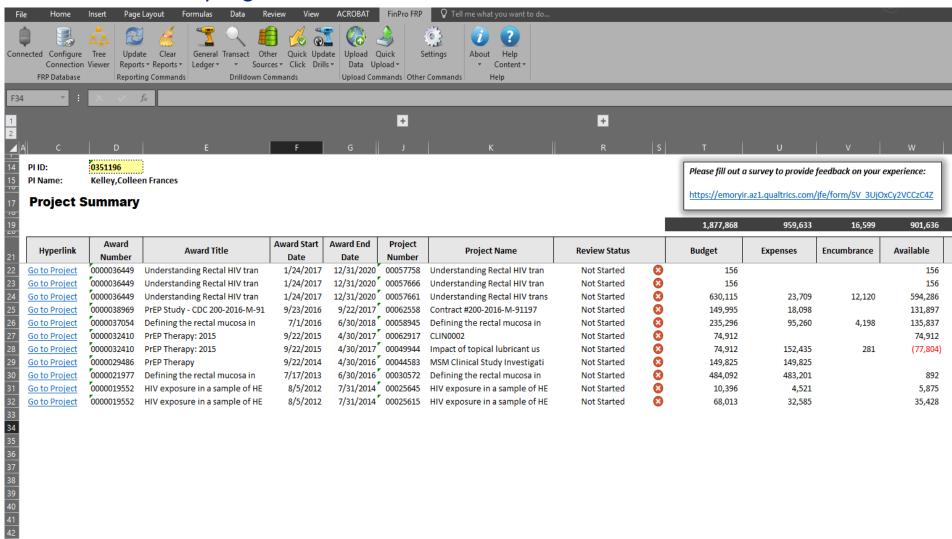
Milestone(s)			
Date	Description		
05/16/2017	Staff Kickoff - Basic Sciences & Medicine		
05/31/2017	Faculty Kickoff - RAS Faculty Task Force		
TBD	Faculty Kickoff Webinar - Basic Sciences & Medicine		
06/15/2017	EBI Data Validation Completed		
06/30/2017	Fatal Flaw Feedback Deadline		
09/15/2017	Feature Feedback Deadline		
11/01/2017	RAS Task Force Study Measurement Date		
11/15/2017	Yerkes / ABOSS Roll-out		
12/01/2017	Pediatrics / Public Health Roll-out		
12/15/2017	ECAS / Hospital-Medicine Roll-out		

Task(s)			
Duration (days)	Start Date	End Date	Description
10	05/01/2017	05/12/2017	Preparation for Roll-Out
77	05/17/2017	08/31/2017	Beta Group Testing and Feedback
21	09/01/2017	10/01/2017	Beta Group Standard Template Changes and Testing
22	10/01/2017	10/31/2017	Beta Group Final User Acceptance Period
43	11/01/2017	12/31/2017	Continued Roll-out to Remaining Units



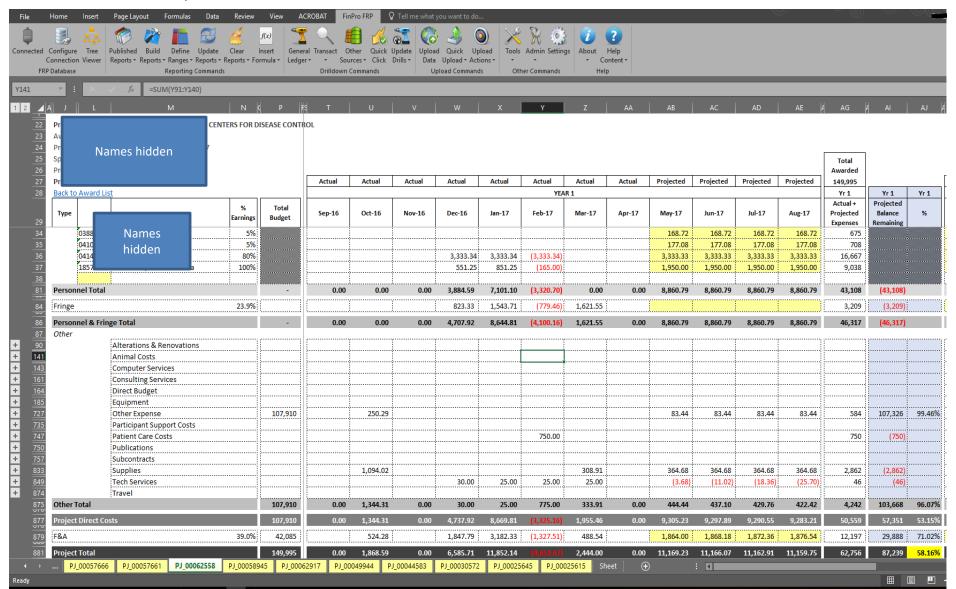






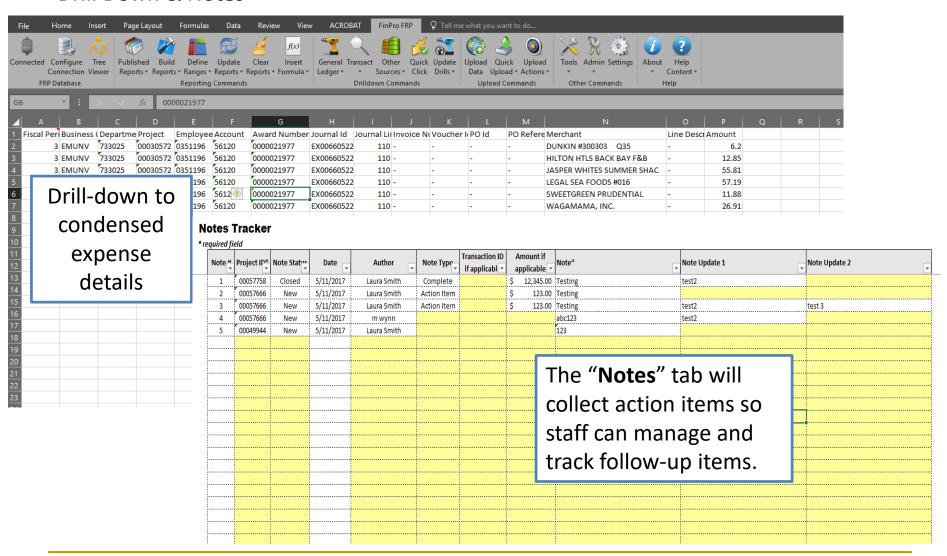
Detailed Template







Drill Down & Notes



Expect (In Scope)

- Greatly reduce time spent on manual entry
- Increased time to spend on analysis
- Quick drill to expense details (double click)
- Summary page for quick navigation & budget/balance information

Do Not Expect (Out of Scope)

- Clinical Trials Template (next phase)
- Drill to labor details
- Ability to search for PI by name (future enhancement)
- Automated tracking of reconciliation & meeting dates (future enhancement)

Role of the FORT Pilot Group

Role of the FORT Pilot Group



Attend the Kickoff Meeting

FINPRO Installation

- Attend Training and/or Drop in Lab(s)
- Use the FORT
- Provide Feedback

FORT Support

Job Aid

- Step by step job aid will be provided to assist pilot group with running reports.
- The job aid is also a part of the pilot and feedback is welcomed.

Log a ticket

- You log a ticket at: <u>FSC Community Website</u>. If you need more information on opening a ticket, please reference the job aid <u>HOW TO OPEN A TICKET</u>.
 - Category: Emory Business Intelligence
 - Subcategory: Financial Outlook Reporting Tool

Website

• ebi.emory.edu/FORT

FORT Pilot Group Checklist

	Activity/Task	Timeline	Resource
	Attend RAS Kickoff Meeting	• May 16 th @ 11am	
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	Deskside Installation	• May 16 th @ 1pm – 5pm	
	Attend FORT Training	TBD (more information coming soon)	
	Start running reports	Ongoing	
	Complete Survey	• Weekly	
	Attend Drop-in labs (OPTIONAL)	TBD (more information coming soon)	
	Provide reports to stakeholders	Ongoing	
	Attend Drop-in labs (OPTIONAL)	TBD (more information coming soon)	
	Provide Fatal Data Flaws & Fatal Design Flaws Feedback	• June 30 th	

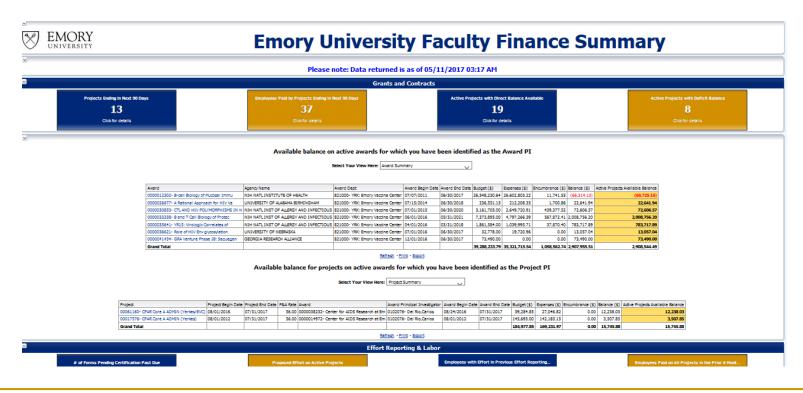


Your name will be entered into a drawing for each survey your complete until June 30th.

PRIZE: \$50 Barnes & Noble Gift Card

FORT Q&A

- Consolidated view of entire financial portfolio
 - Grants/Contracts
 - Effort & Labor
 - Proposals
 - Non-Sponsored Projects



Project #1

- Inherits users login information and runs based on assigned projects
 - No need to make prompt selections
- Project responsibility roles assigned by Departments
 - Currently in pilot status portfolio may not be complete until all Departments have completed roles assignments
 - Contact Department Administration for errors in role assignments
- Customizable with ability to save customized view as default
- Can set to be home screen in EBI
 - Will run immediately upon login

v

You are currently logged in as: sguppy

If your name is not automatically populated in the Employee prompt below, either your department has not completed their roles assignments, or you have not been identified as having responsibility for managing any projects.

Please contact your Department Administrator if you feel this is an error.

Expect (In Scope)

- Financial Summary for projects within Departments included in pilot program
- Ability to see entire
 Grants/Contracts portfolio
 including Award PI projects and
 Project PI projects
- Ability to drill to details
- Customizable report
- Run automatically based on user logged in

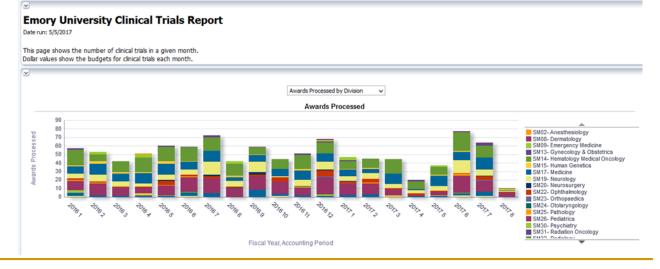
Do Not Expect (Out of Scope)

- Roles assigned for projects in Departments outside of pilot program
- Summary for Administrative roles (Dept/Div Chair, Dean)
 - Will be a different,
 administrative summary
 (future deliverable)

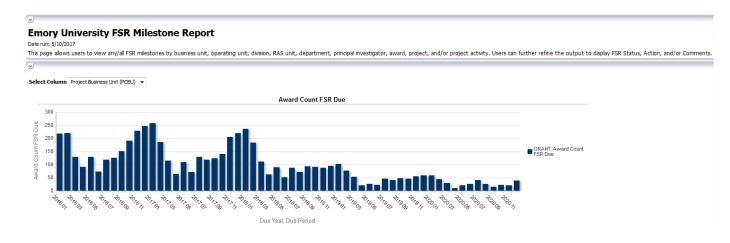
\$100 Budget Report



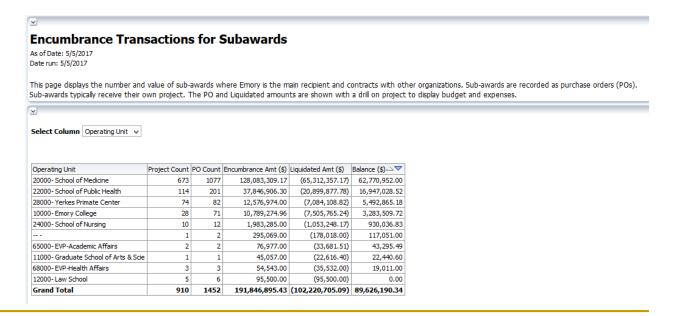
Clinical Trials



FSR Milestones



Sub-awards



Expect (In Scope)

- Release 1 Reports
 - Proposal Statistics and Details
 - Award Statistics and Details
 - \$100 Budget Report
 - Clinical Trials Report
 - Projects in Deficit Report
 - F&A Recovery Report
 - PAN Report
 - FSR Milestone Report
 - Active Closeouts Report
- Reports Delivered Early
 - UTBG Report
 - CAS Exceptions Report
 - Active Subawards Report
 - Projects Ending Report

Do Not Expect (Out of Scope)

- Release 2 Reports
 - Projects Managed
 - Award Milestones
 - AR Aging
 - 100% Distributed Funding
- Release 3 Reports
 - Pending Proposals and Awards
 - Proposed vs. Awarded Effort
 - Scheduled Pay Events
 - Combined GL and SL Report
 - IDC Recovery by month
 - Cost Share Details
 - RAS Productivity/ Capacity Analysis

Missing Pieces?



For additional info: ebi.emory.edu/FORT

Thank you for being in our Beta Group!!