

2012 Sautter Award Proposal

Project Title: UCLA's PI Portal

Submitter Information:

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Names of Project Team Members:

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Summary

As part of UCLA's Research Administration Process Improvement and Deployment (RAPID) Project, the Office of Research Administration has developed a web-based PI Portal built from specifications provided by the RAPID Faculty Advisory Committee. Designed "by PIs for PIs," the tool gives faculty members an easy-to-access, near real-time view of the status of their research fund accounts. PIs are able to drill into each account to access financial details, including individual expenditures and transaction descriptions. The latest release of the PI Portal includes Personnel Reports that allow PIs to view current employee payroll distribution detail by project. Piloted in late 2010, the PI



Portal has now been deployed campus-wide. Before deployment of the PI Portal, faculty had no direct view into their research funding portfolios. The PI Portal provides this data at the click of a button, anywhere in the world.

Project Description

Designed "by PIs for PIs" and developed by the Research Administration Process Improvement and Deployment (RAPID) Team at UCLA, the PI Portal is the outcome of a unique collaboration between research faculty and central research administrators. This web-based tool provides faculty with an easy-to-access, near real-time view of the status of their research accounts. PIs are able to click into their accounts to access current details on salaries and other expenditures.

The PI Portal empowers faculty members by providing them with the up-to-date information needed to make informed financial decisions about their research activities and enables them to manage their funds proactively. The tool also promotes timely dialogue between PIs and their department administrators to enable efficient fund accounting actions. Before deployment of the PI Portal, faculty had no direct view into their research funding portfolios. Many complained that they had to wait weeks for their administrators to produce meaningful financial reports that were soon out of date. Members of the RAPID Faculty Advisory Committee envisioned a tool that would give them a real-time view of their funding at the click of a button, akin to an online banking statement, from anywhere in the world. The PI Portal is the manifestation of their vision.

The PI Portal is designed to become a one-stop shop for PI research administration needs. Using standard campus credentials, each PI logs into a display of her/his own active research accounts. Clicking into any account, the PI sees detailed budget and expenditure data. Another click takes the PI to a visual representation of all personnel being paid on their projects. A "My Proposals" tab is in development to display the PI's pending and funded proposals and to generate standard "other support" pages for use in contract and grant proposals. A "My Deliverables" tab is in design to track grant and contract reporting deadlines.

Currently, the PI Portal includes two main components: My Funds and My Personnel.

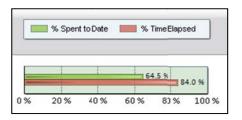


The My Funds tab opens to a high level summary of each PI's active research funds, including the following attributes:

- Sponsor Name and Award Number
- Project Title
- Project and Budget Start and End Dates
- Total Budget
- Total Expenses and Current Fund Balance (as of last night)
- Encumbered and Projected Expenses and Projected Balance



- Burn Rate chart showing the spending rate relative to the project period



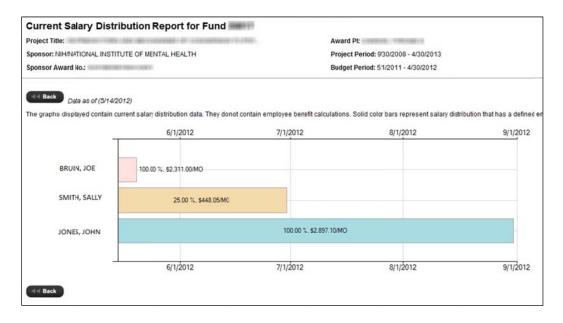
The PI can click to a second screen for each fund to see the detailed budget and expenditures. Data are displayed in a grant budget format that is familiar to PIs, and row and column labels use plain English rather than accounting jargon or codes. There is a feature that allows the researcher to create various budget scenarios to see the impact of possible changes in expenditures.

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A click into any expense category gives the researcher transaction level detail for each expense. For personnel expenses, the Portal displays the full name and pay rate of each person being paid from the fund. All data can be downloaded to Excel and saved or emailed to an administrator. PIs can also delegate access to view their funds as needed.



The **My Personnel** tab allows the researcher to click into each research fund to see a graphical representation of personnel paid on the grant, with percent of pay and date on which assignment to the project is scheduled to end.



The PI Portal is unique in that it was designed by and solely for faculty researchers in collaboration with central research administrators. It pulls data elements from central campus systems and combines, processes and displays them in a way that makes sense to PIs. The PI Portal provides faculty with a personalized view of research administration information in a form that is not available in an integrated view from any other source on campus. It is a sleek, elegant solution that has strength in its simplicity. The PI Portal has truly been a game changer at UCLA.

Technology Utilized

The PI Portal is designed by research faculty members and custom-built by UCLA developers. Due to the cost-saving advantages of UC's Microsoft Consolidated Campus Agreement (MCCA), PI Portal's major architectural components were built via Microsoft technology.

Application Architecture Strategy	Service Oriented Architecture (SOA); web services were implemented to access data from campus data warehouses and to compute business logic. Use of in-memory caching for near real- time processing and to ensure high-performance, and expression trees for dynamic analysis.
Operating System	Microsoft Windows Server 2008 R2
Database	Microsoft SQL Server 2008
	LINQ for querying and updating data daily
Web Server	Microsoft Internet Information Server 7.5
Development Platform,	.NET Framework 3.5
Tools, and Languages	WCF (Windows Communication Foundation)
	Visual Studio 2008
	ASP.NET
	C#.NET
	Ajax Control Toolkit 3.5 (for reducing the number of round trips by

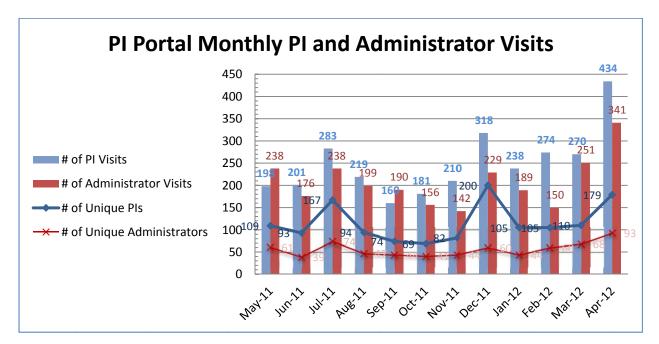


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	minimizing the number of page transitions)
	jQuery Tools (for mouse-over help/tool-tips)
	Dundas Charts (for burn rate chart)
	MS Charts (for personnel chart)
Integration with Existing	UCLA Financial System (FS)
Systems	UCLA Payroll & Personnel System (PPS)
	UCLA Purchasing System (BruinBuy)
	UCLA School of Medicine Financial Projection Module (FPM)
	UCLA Shibboleth Single Sign-On (IAM UCLA)
	ORA Authorization Sub-system
	ORA Notification and Scheduling System (NASS)
Hardware	HP c7000 blade enclosure
	HP Proliant 490 blade servers
	HP p4000 SAN
Virtualization	VMWare ESXi
Performance Testing Tool	Microsoft Visual Studio 2008 Team System Test Edition

Implementation Timeframe

PI Requirements Gathering: February - May 2010 Design: June - July 2010 Development: July - September 2010 Pilot Release: October 2010 - March 2011 Campus-wide Implementation: April 2011

Objective Customer Satisfaction Data



The unique number of PIs that have logged in from inception: 707 The unique number of Administrators (non-PIs) that have logged in from inception: 377



UCLA faculty have expressed great enthusiasm for the PI Portal:

"...I was super frustrated before that I could not easily check on accounts myself, so it is great to have this tool. I've been using it all the time, and have...discovered some errors...on one of my grants because of it."

-Professor from Computer Science

"It is very empowering to actually see how your money is being spent without having to ask someone and wait two weeks!"

-Professor from the RAPID Faculty Advisory Committee

"...I have seen the tremendous progress that is being made...in modernizing and enhancing the research administrative processes on campus. ...the new tools...are exciting steps forward...these efforts have made significant strides toward overcoming the culture of 'administrative inertia' that has dominated here previously."

- Professor from Psychology and Neuroscience