ESPR Updates and Unveiling of the New OSR Website

OSR-Evanston Quarterly Network
Tuesday, October 28th
Information Team
Electronic Sponsored Projects Request (ESPR) 2.0 Enhancements Overview
ESPR 2.0 - Summary

• ESPR went live July 2013
• Enhancements collected via feedback link in system
  – Over 75 enhancement requests received (though many similar)
  – Reviewed by an OSR working group
  – Implemented all that were possible given resource availability and technical feasibility
• Wrapped up review in test environment at beginning of October
• Roll-out on October 20, 2014
Summary

As of November 1, 2014 ESPR should be used for all request types available in the system

• Budget
  – Carry-forward of Unobligated Balance
  – Open New Budget Categories
  – Revised Budget for an Award
  – Revised Budget for Submitted Proposal
• Fabricated Equipment
• No Cost Extension
• Non-Disclosure Agreement

• Personnel
  – Effort Change for PI or Other Key Personnel
  – Extended Absence of PI
  – PI or Co-I Change
  – Change of Department

• Prespending
  – Original Award
  – Continuation Year

• Subcontract
  – Request to Issue New Subaward
  – Subaward Amendment
• Withdraw Proposal
Enhancements - Overview

• Updates to the ‘Create Request’ page including displaying sponsor names and labeling the PI fields
• New interface for entering budgets, including drop-down pick lists for budget categories
• New interface for entering personnel effort changes
• Additional questions added to some forms per central office requirements
*This interface will also be embedded in subk amendments
*The budget category drop-down will also be in the open new budget category request type

### List of Budget Accounts

<table>
<thead>
<tr>
<th>Account</th>
<th>Increase Amount</th>
<th>Decrease Amount</th>
<th>Justification</th>
</tr>
</thead>
<tbody>
<tr>
<td>78664-Human Subject Costs</td>
<td></td>
<td>1000.00</td>
<td>decided to drop human subjects component</td>
</tr>
<tr>
<td>75001-Consultant Services</td>
<td>1000.00</td>
<td></td>
<td>decided to add a consultant</td>
</tr>
</tbody>
</table>

**Totals:**

<table>
<thead>
<tr>
<th></th>
<th>Increase Amount</th>
<th>Decrease Amount</th>
<th>Justification</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Totals:</strong></td>
<td>1000.00</td>
<td>1000.00</td>
<td></td>
</tr>
</tbody>
</table>

**Grand Total:** 0.00

### Edit List of Budget Revisions

<table>
<thead>
<tr>
<th>Budget Category</th>
<th>Increase Amount</th>
<th>Decrease Amount</th>
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<td></td>
</tr>
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<td>0.00</td>
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Effort Change – New Interface
Enhancements - Overview

• Addition of an ‘administrative revisions’ option when OSR reviews

• Updates to notifications:
  – added request type and SP number in the subject, requestor name in body, added notification to RA when all dept approvals complete

• Sortable column headers added for list pages
Enhancements - Overview

• Extensive changes to the subcontractor request type forms:
  – Merged the change and continuation option into a single request type, ‘Subaward Amendment’
  – Added ‘N/A’ option for COI question
  – Additional branching logic added

• Display the approval option when you open an ESPR record via search (not just via email link)

• On list screens, added sorting by column headers (SP#, PI, Dept, etc)
OSR Website 2.0

http://osr.northwestern.edu
Overview

• Background and Development

• Guiding Principles

• Launch Strategy and Timeline

• Design and Functional Changes
Background and Development: Office for Research Websites

• Office for Research (OR) initiative to redesign main OR and divisional websites
  – Existing OR websites launched in 2007
  – Redesigned INVO, IRB, OECC sites launched in 2014
Background and Development

• Redesign involves overhauling front end (design) as well as backend (content management system)

• Project Team:
  – Office for Research Communications (Design and CMS)
    • Julie Cowan, Jerry Vrabel
  – NUBIC (Hosting and Security)
    • Dong Fu
  – OSR website work group (Content and Website SOPs)
    • OSR-Info Team: Kim Griffin, Melissa Mizwa
    • OSR-Chicago: David Lynch, Lori Palfalvi
    • OSR-Evanston: Elizabeth Adams, Kelly Morrison
Guiding Principles

• Organized
  To provide a streamlined, user-friendly web experience and easy access to information

• Informative
  To serve as the key reference tool for OSR policies, resources, educational materials, and contact information

• Consistent
  To maintain consistent, accurate, and timely information
Launch Strategy and Timeline

After a number of starts and stops over the past two years, OSR Website 2.0 will (finally!) be rolled out in two phases:

• **Phase 1**
  – Utilizes previous design work and content development, feedback from internal OSR constituents, examinations of peer institutions
  – Includes critical sections and tools
  – Launch: October 20, 2014

• **Phase 2**
  – Will rely more heavily upon Google Analytics, ongoing user feedback, and a formal post-Phase 1 launch survey, to inform changes
  – Will feature more robust content and any major content reorganization/restructuring
  – Estimated launch: Early 2015
# Searchable Staff Directory

## Staff Directory

### Search Form

- **Name**: 
- **Campus**: 
- **Search**

### View Options

- View All Alphabetically
- View All by Position

### Table

<table>
<thead>
<tr>
<th>Name</th>
<th>Title</th>
<th>Phone</th>
<th>Email</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adams, Elizabeth</td>
<td>Executive Director, Evanston Campus</td>
<td>(647) 401-4266</td>
<td><a href="mailto:eadams@northwestern.edu">eadams@northwestern.edu</a></td>
</tr>
<tr>
<td>Addante, David</td>
<td>Coordinator of Administration and Grants</td>
<td>(312) 630-2986</td>
<td><a href="mailto:david.addante@northwestern.edu">david.addante@northwestern.edu</a></td>
</tr>
<tr>
<td>Barua, Christen</td>
<td>Senior Contract and Grant Officer</td>
<td>(312) 500-5201</td>
<td><a href="mailto:c-barua@northwestern.edu">c-barua@northwestern.edu</a></td>
</tr>
<tr>
<td>Beglinger, Chris</td>
<td>Grant and Contract Officer</td>
<td>(647) 401-3541</td>
<td><a href="mailto:c-beglinger@northwestern.edu">c-beglinger@northwestern.edu</a></td>
</tr>
<tr>
<td>Carl, Taylor</td>
<td>Grants Assistant</td>
<td>(312) 500-3257</td>
<td><a href="mailto:taylor.carl@northwestern.edu">taylor.carl@northwestern.edu</a></td>
</tr>
<tr>
<td>Carver, Amy</td>
<td>Assistant Grants Officer</td>
<td>(312) 503-3170</td>
<td><a href="mailto:amanda.carver@northwestern.edu">amanda.carver@northwestern.edu</a></td>
</tr>
<tr>
<td>Chao, Eugene</td>
<td>Grants Officer</td>
<td>(312) 503-1870</td>
<td><a href="mailto:y-chao@northwestern.edu">y-chao@northwestern.edu</a></td>
</tr>
</tbody>
</table>
Feedback Form

CONTACT US

We welcome you to contact us with suggestions and feedback. We will respond as soon as possible to all inquiries. Please note that for urgent matters you should contact your Grants Officer directly.

Name
First Name: 
Last Name: 

Email *

Comments *

Submit