UNM IT Research Technologies Advisory Board
Minutes: Wednesday, May 24, 2017
Scholes Hall Roberts Room
1:00 – 2:30pm

Attendees: Trish Henning, Ryan Jacobson, Barbara McCrady, David Scott, Mark Emmons, Bill Michener, Jonathan Wheeler, Arash Mafi, Brian Pietrewicz, Grace Faustino, Naren Tarkere
Chair: Patrick Bridges
Support: Emily Morelli

Topics

1. Approve Previous Minutes (April 2017)
   • Approved

2. Research and Grants Data Portal (10 minutes)– Naren Tarkere
   • Naren works for Finance Reporting, which is responsible for maintaining and configuring Cayuse. The goal of MyReports is to provide data to campus in a one-stop portal for research administration for pre- & post-award financial data.
   • Naren demonstrated the “Sponsored Research Executive Dashboard” in MyReports, which combines data from Cayuse and Banner into a repository on a nightly basis. The data is intended for view by deans, directors, chairs, administrators, and PIs to access information. It includes data dating back to 2013. Naren noted that users are able to schedule reports to be delivered to their inbox.
   • Q: Can you pull up data by grant?
     Not in this dashboard, but a Dashboard is available in the Finance Portal (Grant Ledger Detail & Summary).
   • Q: Can you perform calculations?
     Once you download data you can perform calculations, but not in the portal. Board members expressed interest in being able to calculate burn-rate.
   • A “PI Dashboard” that would be personalized by PI upon log-in is in development. Naren is open to information about what will be helpful for managing grants.
   • The tool took a year to develop to provide consistent quality assurance and common elements between Cayuse and Banner to maintain and cleanse data on a daily basis.

3. Research Dashboard (10 minutes) – Alesia Torres
   • Deferred

4. Research Services Survey (15 minutes) – Mark Emmons
   • Mark and Grace reviewed the draft Research Services Survey they have developed. The itemized IT services came from a service matrix developed by the ITO group.
   • Edits: information should be gathered regarding whether services are used locally, centrally or both. Category 3 centers should be added to the list in Question 1. Information about the perceived adequacy of services should be captured, perhaps by adding a column with a Likert scale. Question 8 should be reframed to ask a question.
   • There was discussion about who will be completing the survey – center directors, faculty, IT staff, etc. Grace suggested that beyond ITOs other IT staff may be identified by the OVPR. There was discussion about what the data will be used for, concerns about survey fatigue, and capturing the right information on the first pass. Guided interviews were proposed as one
possible way to gather information, rather than deploying the survey. There was a suggestion that focus groups be used in order to have discussion about what people are using and drilling down when needed. Patrick expressed concern that focus groups are labor intensive and would require someone (who?) to coordinate and conduct groups, collect data and reporting results.

- It was decided to initially ask the ITOs (with consideration of their workflow priorities) to give detailed inventories for their areas to see what data we get; they will be able to provide more detail, but there are unknowns in their areas. Once data comes back from ITOs, next steps will be determined.

5. Research Services Needs (15 minutes) – Jon Wheeler
   - Jon reviewed his notes.
   - He recommended thinking broadly about where we can build capacity through centralization, and where not to.
   - There was discussion about grants management, compliance, and data preservation. Holding focus groups was discussed as both an opportunity to gather information and educate researchers regarding services that are currently available (for instance, data management tools). Identifying IT needs of researchers early in the proposal development and identifying an intake process were also discussed. Grace indicated that an “IT needs” question could be added easily to Early Alert. If there is an intake process for needs, it will be important to map specific needs to infrastructure support to identify opportunities and to keep the scope smaller (for example, concentrating on securing sensitive data rather than all data). There was discussion about harmonizing recommendations, for example for a data enclave, with the direction of the overall Research Strategic Plan.

Next Meeting: June 28, 2017 1:00-2:30pm Scholes Hall, Roberts Room