RA Dashboard Guide

This page is still being developed. Please send comments or suggestions to radash@cornell.edu.

The RAD-Users-L email list is used to send announcements related to the RA Dashboards. To join the email list send an email to RAD-Users-L-request@cornell.edu with the subject of “Join”.

- What is the Research Administrator Dashboard (RAD)?
  - For a list of all the reports please see the Complete Report Inventory
  - Quick Start Video
  - “Filter, View, and Drill”
  - Original documentation
- FAQ
  - Where is RAD?
  - What can I access?
  - How can I copy info from RAD for pasting elsewhere?
  - Can I export the results to Excel?
  - Can I customize how the result appear?
  - Can I save my customized results?
  - How do I apply my saved customization?
  - Can I get a link to send in an email?
  - Which browsers are supported?
  - How do I disable popup blockers?
    - Firefox (Windows)
    - Firefox (Macintosh)
    - Internet Explorer (Windows IE 9 and later)
    - Safari (Macintosh)
  - Does RAD have ad hoc reporting capabilities like Brio?
  - What if I need additional support?
  - What is OBIEE?
  - Will I get the same results in OBIEE that I got in Brio?
  - I rely on saved Brio queries. How will I meet those needs if I can’t use Brio?
  - I have ‘direct connect’ access to the Brio models. How does this change to OBIEE affect me?
- Other Tips and Tricks
  - Favorites
  - “Select a College” Filter
  - Project and Account Search for Investigators
- Data
  - How can I look up a project by the Sponsor’s award number? (a.k.a. Sponsor’s Award ID, Grant #, Contract Number, Agreement #)
  - How do the Award status codes relate to the status groups and active flags?
  - How do the Subaward status codes relate to the status groups and active flags?
  - Where does the RAD data come from?

What is the Research Administrator Dashboard (RAD)?

RAD was designed to be intuitive and easy to use for both the frequent and infrequent user. Research Administrators (RAs) should be able to find the information they need, when they need it, to help them manage sponsored projects and support their investigators.

Generally, users are presented with a view of the data that can be filtered and drilled into. While there are 38 reports, many users will get their needs met by three reports:

1. Project Quick Search
2. Project Account Search
3. Current and Pending

Ad hoc queries for Awards, Proposals, and Subawards offer more flexibility.

For a list of all the reports please see the Complete Report Inventory

Complete Report Inventory

Quick Start Video

If you want to get up to speed quickly this 6 minute video shows the major features of the RA Dashboard.
"Filter, View, and Drill"

The primary search screens are based on a "Filter, View, and Drill" paradigm.

Original documentation

Getting Started with RA Dashboards

FAQ

Where is RAD?

radash.cornell.edu
What can I access?

**Current and Pending**

RA's (anyone who has access to the dashboards but isn't an investigator on any project) can see the Current and Pending report.

Investigators (anyone listed as an investigator on any project) can see only their own Current and Pending report.

**All other RA Dashboards**

Your access to the "legacy" OSP portal is used to determine your initial access RAD. You can be granted access to projects at three different levels: department or college, investigator, and project. How access works.

- A department or college you have been granted access to for the OSP Portal is listed as the administering org on the project
- An investigator you have been granted access to for the OSP Portal is the PI, CoI, or fellow on the project
- You have been given special permission for the project
- A PI, CoI, KP, or Fellow on the project has listed you as their home org on any Form 10. (i.e.: They are "in" your org as far as Ezra knows.)

Investigators have access to their own projects.

If you wish to change your access, please use the access request form for the legacy research portal at http://www.research.cornell.edu/RAIS/SponsDW/Access

How can I copy info from RAD for pasting elsewhere?

In the upper-right corner, just under your name, next to the help link is the "Page Options" menu:

Select: Page Options > Print > Printable HTML

This opens the report in a new tab, from which you can copy any information you need.

Can I export the results to Excel?

Yes, the Page Options menu (above) also provides the ability to export to Excel.

Select: Page Options > Export to Excel > Export Current Page (you'll usually want this option)
Can I customize how the result appear?

- Rearrange columns
  - hover over the top of the column until you see a drag tab and drag it where you want it
- Hide columns
- Unhide columns

Can I save my customized results?

Yes, the Page Options menu (above) also provides the ability to save your customization.

Select: Page Options > Save Current Customization (and give it a Name)

Or create a bookmark (see below)

How do I apply my saved customization?

The next time you open a report that you've customized, Select: Page Options > Apply Saved Customization (and select the Name)

Can I get a link to send in an email?

Yes, the Page Options menu (above) also provides the ability to create a “bookmark link”

You will be given this message, and the ability to copy a link that can be shared.

A Bookmark Link suitable for saving or sharing this page has been created. It is shown in the browser’s Address Bar.

Which browsers are supported?
How do I disable popup blockers?

Firefox (Windows)

a. Click the Firefox menu in the left-hand corner of the window.
b. Select Options.
c. Click Content.
d. To disable all pop-ups, uncheck the Block pop-up windows box.
e. To disable specific pop-ups, click Exceptions and enter the obieeprod.db.cornell.edu.
f. Close the window.
g. Click OK.

Firefox (Macintosh)

a. Select Preferences from the Firefox menu.
b. Choose the Content button.
c. Uncheck the Block pop-up windows box.

Internet Explorer (Windows IE 9 and later)

a. Click the GEAR icon and select Internet Options.
b. Select the Privacy tab.
c. Uncheck Turn on Pop-up Blocker to disable the pop-up blocker.
d. Click the Settings button to disable pop-up blockers for obieeprod.db.cornell.edu.
e. Click OK.

Safari (Macintosh)

a. From the Safari menu, select Preferences
b. Click Security at the top of the window
b. Uncheck the Block pop-up windows box.

Does RAD have ad hoc reporting capabilities like Brio?

There are three reports that provide flexibility in selecting and displaying information from the Research Administration “Subject Areas.” Please see if they may meet your needs:

a. Awards - Ad Hoc Query
b. Subawards - Ad Hoc Query
c. Proposals - Ad Hoc Query

For more complete ad hoc capabilities, OBIEE provides a data analysis tool called “Answers.”

For more information about Answers training: https://www.it.cornell.edu/services/obiee/training/

• Training is done online, and “once you complete at least the first three Lessons/PDF’s, you will be given Answers access to the specific functional areas for which you have been authorized.”

For more information about Answers mentoring, users group, and a listserv: OBIEE Users Group Home

What if I need additional support?

Additional support may be found by emailing radash@cornell.edu.

What is OBIEE?

OBIEE is an Oracle tool that's used to create reports and dashboards to organize them. It is an acronym for “Oracle Business Intelligence Enterprise Edition.” If you've been using Accounting reports or the Research Administrator Dashboard (RAD), you've been using OBIEE. RAD is accessed from the 'Dashboards' drop-down list on the OBIEE menu bar.
Will I get the same results in OBIEE that I got in Brio?
Brio reports were recreated in OBIEE by the BI Team in CIT, who did a preliminary analysis of the data. The reports were then tested by staff in OSP. Please let us know if you get unexplained results RAD-Help@cornell.edu.

I rely on saved Brio queries. How will I meet those needs if I can’t use Brio?
Please try recreating your queries in RAD and saving them. If you find that you can’t get the same results, please contact RAD-Help@cornell.edu.

I have ‘direct connect’ access to the Brio models. How does this change to OBIEE affect me?
The Brio models will remain accessible.

Other Tips and Tricks

Favorites
Answer pending...

"Select a College" Filter
If the “College Org Name” Filter has been preset to “Select a College” you may uncheck that box to get ALL Colleges OR uncheck it and then select just the College(s) you want.

Project and Account Search for Investigators
Use the investigator’s netid to get all research and non-sponsored accounts

Data

How can I look up a project by the Sponsor’s award number? (a.k.a. Sponsor’s Award ID, Grant #, Contract Number, Agreement #)
In RAD you can lookup projects based on the Sponsor’s identifying number in two places:
- Project Quick Search
- Awards - Ad Hoc Query

In the database, the field is: "Proposal Award.Sponsor Proj Id"

How do the Award status codes relate to the status groups and active flags?
How do the Subaward status codes relate to the status groups and active flags?

Where does the RAD data come from?

The data come from Ezra. If you’d like to know how the data are mapped, please see the metadata table. There’s a worksheet for “Proposal Award” and one for “Subcontractor” (a.k.a. Subrecipient)