

Information Builders enables agile information solutions with business intelligence (BI) and integration technologies. WebFOCUS – the most widely utilized business intelligence platform – connects to any enterprise system or application and enables simple and intuitive interaction with information.

Johns Hopkins University

Snapshot

Organization

Johns Hopkins University, the first research university in the United States and the number one recipient of Federal research and development funds today.

The Challenge

Provide faculty and administration with timely information in a user-friendly format so they can manage research grant accounts efficiently.

The Strategy

Replace monthly paper statements with an Internet system that provides secure, 24/7 access worldwide to current information, enables better reporting of critical factors such as grant expenditure burn rates, and automatically downloads data into Excel for further analysis.

The Results

Faster, more efficient administration enables researchers to focus more on science, and the university to manage grants more efficiently.

Information Builders Solution

WebFOCUS, Consulting.



Steven Hinnenkamp, director of financial systems in the controller's office, was project director responsible for the Web-based system.

Johns Hopkins University

Makes Managing Scientists' Grant Accounts as Simple as Online Banking

Ask any scientist what they like to do, and they probably won't tell you managing research grants. Doing the research and seeing the results, yes. Keeping track of the money, no.

When you're one of the largest research universities in the world and receive more Federal research funds from the United States government than any other university, keeping track of the money is a top priority – as is helping researchers focus on what they do best.

When Johns Hopkins University set out to improve business processes across the university, the administration saw a clear opportunity to make it easier for scientists and their administrators to manage research grants, while cutting costs.

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Take It to the Web

The university had been using a paper-based system for tracking sponsored accounts. “At the close of each month, paper statements would be printed, sent to administrators who would then review them, and then – maybe – pass them on to faculty,” explains Steven Hinnenkamp. Hinnenkamp, who is director of financial systems in the controller’s office and a member of the Business Process Improvement Committee, was the project director responsible for creating a new, Web-based system.

“In some instances, through mail lags or misplaced paper forms, the faculty couldn’t get access to the data when they needed it,” Hinnenkamp continues. “By the time a report would get to the researcher, it would be maybe as long as two months after the end of the business month. A researcher could then unknowingly overextend his account, which could lead to government fines being levied against the institution.”

Although the university has a mainframe-based reporting system, from which people can get the data, researchers found it cumbersome and never used it.

Michael Amey, assistant dean for research administration at the School of Medicine, championed the development of a new Web-based system that makes it much simpler for administrators, researchers, and faculty to keep track of their grant money: Access to Financial Information (AFI).

“With this new system, faculty and administration have access to financial data that is accurate as of the previous day’s close of business,” explains Amey. “The Web provided the basis for getting this information to them.”

WebFOCUS Provides a Fast, Flexible Solution

The challenge was to find the right solution: one that provided near-real-time accounting information for complex accounts, had an easy-to-use interface, and could be implemented quickly.

The university considered Hyperion and an OLAP solution working with a multi-dimensional database, says Hinnenkamp. “But we concluded that would be too confusing and complex and much more than we ever needed. The learning curve would be high. We saw a demo, and it was very cumbersome: You had to download the browser-based portion. It was like having an aircraft carrier in the middle of a lake. We really needed a speedboat.”

Information Builders’ WebFOCUS was that speedboat. It could provide real-time access to the data on the mainframe. It used a familiar Web interface, while still giving users a lot of options for analyzing the data. In addition, because of its Web-based, thin-client architecture, it did not require anything to be downloaded on PCs for researchers or administrators. The only training required was to let potential users know it was there and to show them how to log on to the system and get to the reports.

At the same time, WebFOCUS could handle special requirements. For example, one researcher wanted to see all 600 of his grants on the screen at once – that’s 600 columns worth of data. Information Builders consultants developed a solution that gathers the data for all 600 grants from the mainframe and then displays the information in 10 groups of 60 grants at a time, so that the researcher can just scroll through the data.

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Not only could WebFOCUS easily handle the reporting requirements for AFI, it could also be used for other reporting needs at the university, which are planned. In addition, the university already used Information Builders software on the mainframe and knew the technology, so the university could leverage this expertise.

Rapid Implementation With Information Builders Consulting

Information Builders Consulting developed the system in a few months. “The development team was very dedicated and went quite above and beyond the call of duty to give us what we needed and to make sure the project was completed in the time frame we expected,” says Hinnenkamp.

Judy Kilpatrick, the director of Hopkins’ Information Technologies Services, concurs: “Information Builders was an excellent business partner both on a technical and management level. Their consultants became a part of our staff, working as one team. They collaborated with us on project issues both within and outside of their domain as integral team members.”

The consultants, for example, developed a Light Directory Access Protocol (LDAP) security exit routine that enabled the AFI system to be one of the first to participate in the university’s enterprise-wide single sign-on initiative. Single sign-on enables users to access AFI using only their university user ID and password.

The system was thoroughly tested by a team of 30 volunteers across all major departments in the university. As a result, not only did the university gain cross-departmental buy-in, but when the system went live, the users were familiar with it and no application defects were identified.

Quick Intranet Access, Easy Excel Formatting

AFI is available to researchers, known as “principal investigators,” and their administrative staff working in locations around the world. The system, running on an IBM HTTP server, is designed to handle up to 500 users concurrently.

Every department in the university that does research uses the system. It gives them easy, flexible access to a wealth of data and lets them analyze it in Excel – or any format they would like.

After putting in a log-on name and password, the user is taken to an overview report that displays all accounts to which he or she has approved access. The report is a summary of expenditures and remaining balances in total or for an individual account.

From this report, the user selects links to specific account summaries or a master account overview. The individual account summary shows budgets, expenditures, encumbrances, and the account balance. Budgets are listed by category, including services, supplies, stipends, travel, and salaries and wages. The report also includes a revenue summary listing moneys received, invoiced, and over 90 days past due.

The master account overview summarizes activities for a specific master account and all its allocations. Users may see a summary of expenditures and remaining balances for the entire project or may review financial activity for individual allocations.

Find Out More

To find out how our solutions can help your company succeed, talk to an Information Builders representative today.

Contact your local Information Builders office, visit us at

informationbuilders.com,

or in the U.S. and Canada,

call **(800) 969-4636.**

AFI displays both active and inactive accounts.

Each screen of data can be downloaded into Excel or Excel 2000 for further analysis by clicking on a menu bar. Users can then manipulate the data in many ways. The reports also display what are called burn rates – the average amount a principal investigator can spend on the remaining months of a project based on expenditures since the project's inception.

Focusing on Science

"The complex and variable requirements of managing grants and contracts from multiple sponsors makes timely and accurate accounting information very important to principal investigators," Hinnenkamp explains. "By providing faculty and staff a Web interface with close to real-time data, we feel we have met a lot of their needs and made it a lot easier for them to manage sponsored accounts."

"AFI allows researchers to worry more about science and less about money," says Thomas Kelly, director of molecular biology and genetics at the School of Medicine and a faculty representative on a subcommittee that determined AFI's feasibility.

"What every principal investigator wants to know is 'how much money do I have on my grant and what money do I have left to spend,'" says Kelly. "It was hard to get that information in a timely manner in the past. This new system helps an investigator manage his grant and plan his science accordingly. AFI is also useful for administrators who want to see an overview of all the grants in the department. An administrator and researcher can be looking at the same account summary from any remote location."

Currently AFI shows information only for sponsored accounts – those receiving money from research sponsors – but the university is investigating expanding it to include all accounts, including gift accounts, invalid accounts, and general funds.

And how do the scientists feel about it? When the idea was originally proposed, a lot of people said the faculty would never look at this, reports Hinnenkamp. But they are. A recent enhancement to the system allows Hinnenkamp's team to track who is using the system and how much. "It is encouraging that there are hundreds of people using it," he says. "It's still new. Administrators are using it too. They're downloading the data in spreadsheets, and then expanding it to provide additional information for principal investigators. As we expand the system to include all accounts, we'll be able to see the true picture."