

Function List -Information Technology (ITS)

DRAFT v.2.1

The Research Foundation for SUNY

What is the RF Function List?

The Research Foundation provides essential services to support research activities at the 29 state-operated SUNY campuses and SUNY System Administration. To support these activities, the RF central office staffs key functions with a “function owner” who coordinates the activities of the function from a corporate perspective. Activities differ by function and whether the campus is “centralized” or “decentralized.” For centralized campuses, the RF central office performs Sponsored Programs Services.

This document lists each function, its owner, and what activities are performed at the central office and what activities are performed at campuses.

Function Definition

A function is a group of like processes – processes having an input, action, and output. Function owners are responsible for all activity under a function (internal controls, policies and procedures, signatory authority, learning and development, metrics, etc.). There may be staff from various offices (e.g., Legal) that perform activities in a function, but the ownership of those activities lies with the function owner.

Purpose of the Function List

To ensure consistency throughout the organization, this function list is used when breaking down the work the RF does in any scenario, including but not limited to:

- Internal controls and risk management enterprise-wide
- OM responsibility/delegation of authority
- Contacts on Web site
- Cost allocation model
- Policies and procedures

* Costs are allocated to campuses based on the headings below, with the following exceptions:
Insurance and Treasury are allocated separately, Sponsored Programs Administration includes Pre and Post Award functions listed above, S&P includes Research Growth activities

AUDIT 1. Internal Audit/Advisory Support
BUSINESS DEVELOPMENT 1. Investor Development 2. Joint Ventures
CORPORATE COMPLIANCE 1. Research Compliance 2. Corporate Ethics and Values 3. Information Security 4. Internal Controls and Risk Management 5. Policy and Procedure Administration 6. Privacy and HIPAA 7. Insurance 8. DMV Registrations 9. Fraud and Misconduct Policy /Internal Investigations 10. Security Clearance - FSO
COMMUNICATIONS AND EXTERNAL RELATIONS 1. Communications and Messaging 2. External Information Requests 3. Public Website Content Management and Website Maintenance 4. Social Media Sponsorship and Conference Planning 5. Web Governance
FINANCE (1 of 2) 1. Accounts Payable * 2. Federal Rate Devlmt. (Indirect Cost Proposal/ Special Rates) 3. Fixed Asset Management 4. Purchasing 5. Fringe Rate Development 6. Payment Taxation Compliance 7. Research Management and Support Fund Administration 8. Cash Receipts/Banking 9. Income Fund Reimbursable 10. Labor Distribution 11. Payroll 12. Financial Planning and Analysis

FINANCE (2 of 2) 13. Generally Accepted Accounting Principles Financial Accounting/Reporting 14. Investments 15. Risk Tolerance Management 16. System Admin 660 Administration 17. Treasury Management *
HUMAN RESOURCES 1. Staffing and Appointments 2. Time and Leave Administration 3. Learning and Development 4. Union Relations [MISSING INFO] 5. Benefit Administration [MISSING INFO] 6. Benefit Programs 7. Classification and Compensation 8. Diversity and Inclusion 9. Employee Relations and Affirmative Action 10. Non-Citizen Employment 11. Integrated Services 12. Employee Recognition 13. Labor Relations
INFORMATION TECHNOLOGY (ITS) 1. Business Analysis and Application Portfolio 2. Infrastructure and Operations 3. Data Services 4. Customer Services 5. Data Center Services 6. Networking Services 7. IT Security Operations 8. Operational Processes 9. Enterprise Application Services 10. Report Center 11. Inteum / Minuet / Inventor Portal 12. Pre-Award & Compliance Services (PACS) 13. Employee Compensation Compliance (ECC) 14. Application Database Administration 15. Communication 16. Website Services 17. 3rd Party Application Support 18.Passthrough Management 19. Project Portfolio Management 20. Window Server Support 21. Voice, Video, and VoIP 22. Desktop Support Services 23. RFCO Technology Services
LEGAL SERVICES 1. Legal Services 2. CORPORATE GOVERNANCE (BOARD SECRETARY FUNCTION)

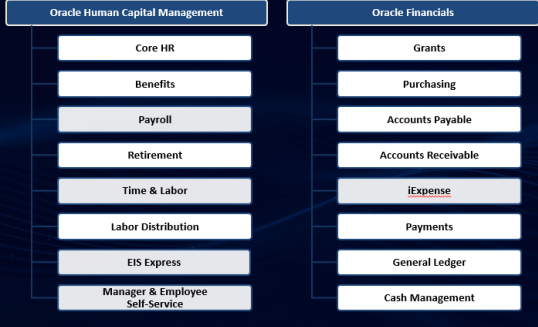
POST-AWARD 1. Accounts Receivable 2. Award & Contract Review and Negotiation 3. Award Establishment and Maintenance 4. Sponsored Programs Administration and Compliance
PRE-AWARD 1. Pre-Award Systems
INNOVATION: PATENTS, TECHNOLOGY, LICENSING AND INTELLECTUAL PROPERTY 1. Commercialization 2. Innovation Analytics 3. Discovery 4. Disclosure 5. Evaluation 6. IP Protection 7. Customer Discovery 8. Partnering 9. Product Development 10. Public Use & Financial Returns
RESEARCH GROWTH * 1. Vice Chancellor for Research and Economic Development Support (VCRED) 2. Promoting SUNY Research Content Development, Presentation and Distribution
STRATEGY & PLANNING 1. Customer Relationship Management 2. Strategic and Annual Operating Plans 3. Strategic Planning Analysis
SPONSORED PROGRAM SERVICES 1. Integrated Services – Post-Award 2. Integrated Services – Pre-Award

Function	Business Area	Function Owner / VP	Function Leader	Function Description	Activities performed at Central Office	Activities performed at the Campus
1. Business Analysis and Application Portfolio ORIGINAL ENTRIES	ITS	Application Services/ Paul Manley	Paul Manley	The Business Analysis and Application Portfolio function is responsible for software application development, RF Business System maintenance, and business analysis in support of systems, software, and process reengineering.	<ul style="list-style-type: none"> Developing and rolling out releases for the RF business applications. Maintaining and upgrading the RF business applications. Closing month end Batch processing support – daily/monthly Reconciliation activities Supporting and training on the RF Business System Supporting campus requests/questions around business applications functionality Analyzing and resolving service requests Business analysis related to process reengineering, which include working with campuses and central office departments to evaluate and develop enhancements that will lead to operational efficiencies. 	<ul style="list-style-type: none"> Providing front line support for campus end user questions
2. Infrastructure and Operations ORIGINAL ENTRIES	ITS	Infrastructure Services/ Alan Tesi	Alan Tesi	The Infrastructure and Operations function implements all aspects of the RF's IT program, ensuring that the lights remain on, data in the systems are secure, and business processes are in place to ensure data security, disaster recovery, and superior end user support.	<ul style="list-style-type: none"> Ensuring efficient operation of the following through the RF's outsourced technology vendor: <ul style="list-style-type: none"> RF data centers RF network, including systems administration and database administration RF desktop support RF Customer Services (help desk) Managing the IT budget, including maintenance and support contracts, vendors, and costs that "pass-through" the RF's external technology vendor Developing and implementing disaster recovery and backup procedures 	<ul style="list-style-type: none"> Working with RF customer services for campus support
3. Data Services ORIGINAL ENTRIES	ITS	Reporting/ John Paris	John Paris	The Data Services function is responsible for business intelligence application development, maintenance, and support. The function manages the RF Report Center, a robust analytical application for the user community to aid in data delivery and process reengineering through business automation for operational efficiencies.	<ul style="list-style-type: none"> Resolving business intelligence service request Creating and managing data dashboards Planning and executing monthly Report Center releases Monitoring performance Performing data reconciliation activities Creating analysis Documenting the system and training end users Running analysis Tracking usage 	<ul style="list-style-type: none"> Creating Analysis Running Analysis Testing Major Upgrades Participating in monthly focus group meetings

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1. Customer Services	ITS	John Paris	Duane Mysliwiec	Provide superior Level 1 and Level 2 customer service to our clients at the RF and throughout the SUNY systems.	<ul style="list-style-type: none"> • Provide multiple ways for users to access help including phone, web services portal and email. • Keep the user updated through automated ticket updates or by phone if appropriate. • Ensure the tickets are resolved in a timely manner and follow up to ensure the customer is satisfied with the solution provided before closing out the request. 	<ul style="list-style-type: none"> • Provide feedback to update SOPs • Complete surveys for customer support improvements • Update tickets in a timely manner when information is requested • Testing once an issue has been resolved to ensure it is working as expected •
2. Data Center Services	ITS	John Paris	Duane Mysliwiec	Ensure each data center the RF operates is highly available, stable, secure and operating at peak levels.	<ul style="list-style-type: none"> • Ensure systems are monitored for errors and all environments are operating at appropriate levels to protect the systems. • Ensure there are adequate physical controls in place to limit access to individuals needing access only. • All systems should be backed up to ensure data is protected both on-prem and in the cloud in case one backup set is corrupted or unable to be restored from. 	<ul style="list-style-type: none"> • Test data, systems and network access post upgrades, installs or configuration changes related to Servers, Storage, Networking or Firewall changes. • Immediately inform ITS of any issues to minimize impact to campus users.
3. Networking Services	ITS	John Paris	Duane Mysliwiec	Ensure connectivity is highly available to the RFCO and Enterprise applications and data through network connectivity.	<ul style="list-style-type: none"> • Work with the campuses on firewall changes to enable user access, interface access and application access from remote locations. • Ensure our systems are protected by multiple layers of security including firewalls, access lists and other technologies and keep them up to date to minimize vulnerabilities and risk(s) to the organization's systems and data. 	<ul style="list-style-type: none"> • Test connectivity after any firewall, network or cybersecurity controls to ensure campus users have access to the data and systems they need after any modifications or upgrades.


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4. IT Security Operations	ITS	John Paris	Duane Mysliwec	Ensure all systems are scanned for vulnerabilities and remediated in a timely manner based on risk and impact.	<ul style="list-style-type: none"> Ensure appropriate controls are in place to protect physical and digital assets. Provide guidance on cybersecurity controls based on the NIST framework. 	<ul style="list-style-type: none"> Test to ensure campus users have access to the data and systems they need after any modifications, upgrades or additional controls are placed into production.
5. Operational Processes	ITS	John Paris	Jaya Chavali / Duane Mysliwec	Running the nightly process to update the data warehouse so the campuses can run reports throughout the day and not impact production.	<ul style="list-style-type: none"> Running a preliminary biweekly payroll for all employees and campuses to fix issues prior to biweekly payroll Running nightly processes that process biweekly payroll and off week payroll for all employees and campuses Printing Return checks for all campuses Process Mail checks for all campuses Process Bank of America and ACH for employees and campuses Run jobs that process and update benefits for all employees, current and past Process Medicare exchange file for all employees Transfer TIAA file for employee retirement Process EBS jobs for campus interface builds Process Holiday Processes to credit all employees and campuses with holiday accruals Process reversals to correct errors 	<ul style="list-style-type: none"> Provide feedback on any issues to ensure future processes are run to meet the needs of the campus Help troubleshoot in the event a process does not run as expected Help validate any new processes Help validate any changes in current processes. Assist in validating any new processes put into production to ensure they meet the needs of the campus

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					<ul style="list-style-type: none"> • Process pre-gens • Process calendar year to date kbace reports for all campuses • Process fiscal year to date kbace report for University at Albany • Process hourlies for all employees and campuses • Ensure stakeholders receive regular and timely updates on operational changes, system availability, and important initiatives. 	
6. Enterprise Application Services	ITS	John Paris	Jaya Chavali	Oracle E-Business Suite (EBS): Provide support and maintenance for mission critical RF Enterprise Application Oracle E-Business Suite (EBS).	<p>Services include but are not limited to:</p> <p>Operational Support & System Upkeep:</p> <ul style="list-style-type: none"> • Ensure applications meet patching, security and compliance/system requirements. Such as: <ul style="list-style-type: none"> ○ Enable Multi Factor Authentication ○ Password criteria ○ Encryption (Transit, Rest) ○ Quarterly Critical Patch Updates (CPU) ○ Mandatory Payroll Patches (up to 3 per year) • Developing and rolling out releases for the RF business applications • Provide business analysis support related to process reengineering, which includes working with campuses and central office departments to evaluate and develop enhancements that will lead to operational efficiencies 	<ul style="list-style-type: none"> • Providing front line support for campus end user questions • Provide input on requirements for campus specific enhancements • Participate in user acceptance testing for systems changes • Act as liaison between the center office and campus faculty and other user communities • Complete user access administration activities for their own campus locations: University at Albany, Alfred State College, Binghamton University, Buffalo State University, University at Buffalo, SUNY Poly – CNSE, SUNY Cortland, SUNY Downstate Health Sciences University, SUNY College of Environmental Science and Forestry, Stony Brook University

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					<ul style="list-style-type: none">Support & maintain several modules in Oracle E-business Suite: ORACLE E-BUSINESS SUITE (EBS) Responsible for successful run of batch schedule processing (M-F both nightly and during the day)<ul style="list-style-type: none">2410 single requests run each nightApproximately 55,500 single requests in a monthAverage nightly processing run time is 3.5 hoursProvide off hours support to troubleshooting & remediate issuesCollaborate with RFCO & campuses to fix any data issuesFor additional details review section Operational Processes <ul style="list-style-type: none">Day-to-day upkeep of the application:<ul style="list-style-type: none">Address RFCO & campus inquiries/issuesOrg maintenanceClosing month end	

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					<ul style="list-style-type: none">○ Reconciliation activities○ training on the RF Business System○ Systematically applying fringe rate changes○ Analyzing and resolving service requests <p>Strategic Planning:</p> <ul style="list-style-type: none">● Generate a 5 year Rolling Strategic & Technical Roadmaps● Collaboration with SUNY System Admin and Campuses in technology and data governance initiatives <p>Project Initiatives:</p> <ul style="list-style-type: none">● Enhance application functionality to meet the needs of 30+Campuses and RFCO<ul style="list-style-type: none">○ Collaborate on enhancements needs to support specific campus initiatives & testing● Implement application changes to meet the federal and state regulatory mandates and requirements:<ul style="list-style-type: none">○ Collaborate with RFCO business leads/liaisons to comprehend mandates from legislative & governing bodies and impact to RF applications● Upgrade the multi layered technical stack (application, database, middle tier) as new versions are released by the vendors to ensure	

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					<div>application meets support requirements</div> <div><ul style="list-style-type: none">• Integrations:• Maintain and support complex integrations between 3rd party vendors benefit provided, banking partners and campuses</div> <div><p>The diagram, titled 'RFSUNY INBOUND/OUTBOUND FLOW 31-July-2024', illustrates the flow of data and processes between various systems and departments. It features a central blue box containing several red boxes representing core systems: Grants Mgmt, Purchasing, Accounts Payable, Cash Mgmt, Payroll, PACS, Report Center, ECC, and HR. Surrounding this central box are numerous other systems and departments, each represented by a colored box. Arrows indicate the direction of data or process flow. A legend at the bottom, titled 'Keys/Color Codes', defines the colors: light blue for Manual Secure Transfer, yellow for SFTP Appoint, orange for Manual SFTP, green for SOA, grey for Reporting, and red for EBS Modules. It also uses line styles to represent Data Flow Lines (solid) and Data Link YEs (dashed).</p></div> <div><ul style="list-style-type: none">• Misc:<ul style="list-style-type: none">○ Support campus specific initiatives by providing:○ Insights on RF applications functionality & data○ Input on any business process reengineering (BPR) items○ Design & functionality impacting RF○ Conversion & data needs○ Interfaces & data exchanges• Financial and Security Audit:<ul style="list-style-type: none">○ Provide necessary materials & documentation to support annual financial & security audit needs</div>	

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Enterprise Application Services	ITS	John Paris	Jaya Chavali	Report Center: Provide support and maintenance for mission critical RF Enterprise Application Report Center.	<p>Services include but are not limited to:</p> <p>Operational Support & System Upkeep:</p> <ul style="list-style-type: none">• Ensure applications meet patching, security and compliance/system requirements. Such as:<ul style="list-style-type: none">○ Enable Multi Factor Authentication○ Password criteria○ Encryption (Transit, Rest)○ Quarterly Critical Patch Updates (CPU)• Developing and rolling out releases for the RF business applications• Provide data analysis support related to enterprise and campus specific data. The diagram below depicts the data that is available in Report Center from all the modules within Oracle EBS and Huron applications:  <ul style="list-style-type: none">• Responsible for successful run of ETL schedule processing (M-F both nightly and during the day)• Approximately 700 ETL processes run each night	<ul style="list-style-type: none">• Providing front line support for campus end user questions• Provide input on requirements for campus specific queries• Participate in user acceptance testing for systems changes• Act as liaison between the center office and campus faculty and other user communities• Complete user access administration activities for their own campus locations: University at Albany, Alfred State College, Binghamton University, Buffalo State University, University at Buffalo, SUNY Poly – CNSE, SUNY Cortland, SUNY Downstate Health Sciences University, SUNY College of Environmental Science and Forestry, Stony Brook University

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					<ul style="list-style-type: none">○ Approximately 16,000 ETL processes in a month○ Average ETL processing run time is 5-6 hours○ Provide off hours support to troubleshooting & remediate issues○ Collaborate with RFCO & campuses to fix any data issues○ Day-to-day support of the application:○ Address RFCO & campus inquiries/issues○ Provide data analytics and reporting using integrated data from multiple applications○ Month end builds○ Reconciliation activities○ Training <p>Strategic Planning:</p> <ul style="list-style-type: none">● Generate and maintain a 5 year Rolling Roadmap● Collaborate with SUNY System Admin and Campuses in technology and data governance initiatives <p>Project Initiatives:</p> <ul style="list-style-type: none">● Enhance application functionality to meet the reporting needs of 30+Campuses and RFCO.● Implement reporting changes to meet the federal and state regulatory mandates and requirements:	

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					<div><div>○ Collaborate with RFCO business leads/liaisons to comprehend mandates, information sources and impact to reporting</div><div>● Upgrade the multi layered technical stack (application, database, middle tier) as new versions are released by the vendors to ensure application meets support requirements</div><div>Integrations:</div><div>● Maintain and support query-based outbound integrations between Report Center and campuses</div><div>● Maintain and support inbound integrations between Report Center and various data sources</div><div>Misc:</div><div>Maintain and support various subject areas & dashboards that are available in Report Center:</div></div>	

REPORT CENTER DASHBOARDS OVERVIEW				
Dashboard	Description	Target Audience	Dashboard Accessed by Unique Users in QTYs	# of Queries in December 2023
Financial Reporter Key Financial Indicators (RFI)	This Dashboard includes indicators that are being used for monitoring key financial data at campuses as this activity is one of the key responsibilities of a financial manager. Operations managers are responsible for ensuring that effective risk management systems are in place that include metrics for evaluating the financial performance of organizational objectives. Metrics should be evaluated monthly to identify financial performance that is below or above expectations. This Dashboard currently offers several indicators to accomplish this monitoring.	CM & Sponsored Programs	93	270
Operations Manager Dashboard/Operations Managers	This dashboard provides an overview of data related to assist the CM with managing RF business including but not limited to: Programs, Regulatory Compliance (Expenditures, People, All Key Metrics), and a link to innovation data on the KPI dashboard within the system capabilities.	CM	76	203
Innovations and Partnerships/Technology Transfer	This Dashboard provides Award Inquiry and Accounts Payable data for TTD.	Central Office Tech Transfer	43	24
Revenue Forecast Dashboard/Revenue Forecast	This Dashboard provides actual data per fiscal year for 5 years, for comparison to the revenue forecast projections.	CM & Sponsored Programs	37	38
Usage Tracking Dashboard/Usage Dashboard	This Dashboard provides data on the usage of all the dashboards and portals that are in the RF Report Center. The data displayed is on a daily, weekly, and yearly basis.	Central Office	32	36
Process Office Dashboard/Process Office Dashboard	This Dashboard provides key monitoring information requested by the finance office for all functions within the department or across the organization.	Central office	17	25
Campus Specific - 200 Award Dashboard/200 Award Dashboard	This Dashboard provides University at Buffalo users with award administration, team, and project credit information. Permissions are assigned by user or requested by University at Buffalo.	Buffalo Award Administration	3	0
Effectiveness and Efficiency Metrics/Accounts Receivable (AR)	This Dashboard provides key Accounts Receivable metrics for monitoring At Risk Aging, Funds Returned to Sponsor, Unfilled AR Orders, and Critical Order Unfilled AR Orders. Permissions for access is requested in Sponsored Program representation.	Sponsored Program Administration	3	0

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					<div><div>REPORT CENTER DASHBOARDS OVERVIEW</div><table><tr><th>Dashboard</th><th>Description</th><th>Target Audience</th><th>Dashboard Accessed by Unique Users in Q3</th><th># of Queries in December 2023</th></tr><tr><td>Principal Investigator-Principal Investigator</td><td>This Dashboard provides Principal Investigators and Project Staff the ability to monitor and have access to all their account information, which includes: salary transactions, procurement information, accounts receivable, etc. also includes:</td><td>Principal Investigators</td><td>2017</td><td>1070</td></tr><tr><td>RF Activity Interface Reporting-RF Activity Interface Reporting</td><td>This Dashboard provides administrator staff the ability to monitor and have access to all accounts balances with details about salary transactions, procurement information, accounts receivable, MARS, AP Payment registers, bank, and cash position. It also provides various search options related to current requests they receive on a day-to-day basis.</td><td>Sponsored Program Administration</td><td>1303</td><td>3860</td></tr><tr><td>Financial Reports-Resource Expenditure Report (ARR)</td><td>This Dashboard provides a system-wide view of all resource expenditure activity within Research & Innovation. The report within this dashboard displays expenditures in summary by campus and is used to monitor corporate expenditures with other related capabilities.</td><td>CRM & Sponsored Programs</td><td>508</td><td>123</td></tr><tr><td>Financial Reports-Sponsored Program Activity Report (SAR)</td><td>This Dashboard provides a system-wide view of the current level of sponsored program activity administered by the RF as it prepares to fulfill its primary user. Each section has RF-related capability to view related reports and can drill down to data. Information Users can drill down further to access award/project-specific information using the RF Activity Interface Reporting Dashboard.</td><td>CRM & Sponsored Programs</td><td>289</td><td>245</td></tr><tr><td>Financial Reports-Expenditure Profile Report (EPR)</td><td>This Dashboard breaks out expenditures by campus into the following categories: Sponsor, Organization, Program, Historical Program, and by Financial Center. Each section has RF-related capability to view related reports and can drill down to data. Information Users can drill down further to access award/project-specific information using the RF Activity Interface Reporting Dashboard.</td><td>CRM & Sponsored Programs</td><td>274</td><td>122</td></tr><tr><td>Key Performance Indicators-Key Performance Indicators</td><td>This dashboard displays the data that is used for tracking progress against meaningful goals to help SUNY and the RF manage its resources for research and innovation. It includes research capacity and performance, innovation economic outcomes, and enhance student opportunities over the next five years.</td><td>CRM & Sponsored Programs & Tech Transfer</td><td>214</td><td>265</td></tr><tr><td>Accounts Receivable Dashboard-Accounts Receivable Dashboard</td><td>This dashboard provides key accounts receivable functional monitoring regarding outstanding invoices, cash position/forecast, and invoice aging and collection activity.</td><td>Accounts Receivable</td><td>178</td><td>221</td></tr><tr><td>Financial Report-Management</td><td>This dashboard provides a monthly overview of financial reporting from the Grants System. Cash Basis with different reports. The dashboard was developed to automate the monthly report the finance office produced for the Board of Trustees. It provides information on a monthly basis and provides information on a monthly basis.</td><td>CRM & Sponsored Programs</td><td>164</td><td>123</td></tr></table><div><div>REPORT CENTER – KEY SUBJECT AREAS</div><table><tr><th>Functional Area</th><th>Subject Areas</th><th>Functional Area</th><th>Subject Areas</th></tr><tr><td>Proposal</td><td>PACS – Proposal Credit Distribution</td><td>Purchase Order</td><td>Purchase Order Distribution</td></tr><tr><td>Proposal</td><td>PACS – Proposals</td><td>Vendors</td><td>Vendors and Vendor Sites</td></tr><tr><td>Proposal</td><td>Grants – Pre-Award</td><td>General Ledger</td><td>Balances</td></tr><tr><td>Requisition</td><td>Requisition Distribution</td><td>General Ledger</td><td>Journal</td></tr><tr><td>Requisition</td><td>Requisition Lines</td><td>Property Control</td><td>Property Control</td></tr><tr><td>Daily Grants</td><td>Post Award Management</td><td>Cash Management</td><td>Cash Management</td></tr><tr><td>Daily Grants</td><td>Post Award Management – Award Credit</td><td>Tech Transfer</td><td>Innovation Indicators</td></tr><tr><td>Daily Grants</td><td>Post Award Management – Committed Effort</td><td>Accounts Payables</td><td>Invoice Check Distributions</td></tr><tr><td>Daily Grants</td><td>Post Award Management – Project Credit</td><td>Accounts Payables</td><td>Invoice Distributions</td></tr><tr><td>Daily Grants</td><td>Post Award Management – Transaction Controls</td><td>Accounts Payables</td><td>Invoice Payments</td></tr><tr><td>Daily Grants</td><td>Award Management – Installments</td><td>Accounts Receivables</td><td>Aging</td></tr><tr><td>Grants Snapshot</td><td>Grants Snapshot</td><td>Accounts Receivables</td><td>Receipts</td></tr><tr><td>Grants Snapshot</td><td>Grants Snapshot – Award Credit Distribution</td><td>Human Resources</td><td>Benefits Enrollment</td></tr><tr><td>Grants Snapshot</td><td>Grants Snapshot – Financial Reporting</td><td>Human Resources</td><td>Labor Distribution</td></tr><tr><td>Grants Snapshot</td><td>Grants Snapshot – Project Credit Distribution</td><td>Human Resources</td><td>Legacy</td></tr><tr><td>Grants Snapshot</td><td>Daily Fiscal Year Spend</td><td>Human Resources</td><td>Operational Data Store</td></tr><tr><td>Grants Snapshot</td><td>CO Reporting – Snapshots</td><td>Human Resources</td><td>Retirement</td></tr><tr><td>Grants Snapshot</td><td>HEIRD</td><td>Human Resources</td><td>W2 and 1042S</td></tr></table></div></div>	Dashboard	Description	Target Audience	Dashboard Accessed by Unique Users in Q3	# of Queries in December 2023	Principal Investigator-Principal Investigator	This Dashboard provides Principal Investigators and Project Staff the ability to monitor and have access to all their account information, which includes: salary transactions, procurement information, accounts receivable, etc. also includes:	Principal Investigators	2017	1070	RF Activity Interface Reporting-RF Activity Interface Reporting	This Dashboard provides administrator staff the ability to monitor and have access to all accounts balances with details about salary transactions, procurement information, accounts receivable, MARS, AP Payment registers, bank, and cash position. 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CRM & Sponsored Programs	289	245	Financial Reports-Expenditure Profile Report (EPR)	This Dashboard breaks out expenditures by campus into the following categories: Sponsor, Organization, Program, Historical Program, and by Financial Center. Each section has RF-related capability to view related reports and can drill down to data. Information Users can drill down further to access award/project-specific information using the RF Activity Interface Reporting Dashboard.	CRM & Sponsored Programs	274	122	Key Performance Indicators-Key Performance Indicators	This dashboard displays the data that is used for tracking progress against meaningful goals to help SUNY and the RF manage its resources for research and innovation. It includes research capacity and performance, innovation economic outcomes, and enhance student opportunities over the next five years.	CRM & Sponsored Programs & Tech Transfer	214	265	Accounts Receivable Dashboard-Accounts Receivable Dashboard	This dashboard provides key accounts receivable functional monitoring regarding outstanding invoices, cash position/forecast, and invoice aging and collection activity.	Accounts Receivable	178	221	Financial Report-Management	This dashboard provides a monthly overview of financial reporting from the Grants System. Cash Basis with different reports. The dashboard was developed to automate the monthly report the finance office produced for the Board of Trustees. It provides information on a monthly basis and provides information on a monthly basis.	CRM & Sponsored Programs	164	123	Functional Area	Subject Areas	Functional Area	Subject Areas	Proposal	PACS – Proposal Credit Distribution	Purchase Order	Purchase Order Distribution	Proposal	PACS – Proposals	Vendors	Vendors and Vendor Sites	Proposal	Grants – Pre-Award	General Ledger	Balances	Requisition	Requisition Distribution	General Ledger	Journal	Requisition	Requisition Lines	Property Control	Property Control	Daily Grants	Post Award Management	Cash Management	Cash Management	Daily Grants	Post Award Management – Award Credit	Tech Transfer	Innovation Indicators	Daily Grants	Post Award Management – Committed Effort	Accounts Payables	Invoice Check Distributions	Daily Grants	Post Award Management – Project Credit	Accounts Payables	Invoice Distributions	Daily Grants	Post Award Management – Transaction Controls	Accounts Payables	Invoice Payments	Daily Grants	Award Management – Installments	Accounts Receivables	Aging	Grants Snapshot	Grants Snapshot	Accounts Receivables	Receipts	Grants Snapshot	Grants Snapshot – Award Credit Distribution	Human Resources	Benefits Enrollment	Grants Snapshot	Grants Snapshot – Financial Reporting	Human Resources	Labor Distribution	Grants Snapshot	Grants Snapshot – Project Credit Distribution	Human Resources	Legacy	Grants Snapshot	Daily Fiscal Year Spend	Human Resources	Operational Data Store	Grants Snapshot	CO Reporting – Snapshots	Human Resources	Retirement	Grants Snapshot	HEIRD	Human Resources	W2 and 1042S	<ul style="list-style-type: none">• Providing front line support for campus end user questions• Provide input on requirements for campus specific enhancements• Participate in user acceptance testing for systems changes• Act as liaison between the center office and campus faculty and other user communities
Dashboard	Description	Target Audience	Dashboard Accessed by Unique Users in Q3	# of Queries in December 2023																																																																																																																											
Principal Investigator-Principal Investigator	This Dashboard provides Principal Investigators and Project Staff the ability to monitor and have access to all their account information, which includes: salary transactions, procurement information, accounts receivable, etc. also includes:	Principal Investigators	2017	1070																																																																																																																											
RF Activity Interface Reporting-RF Activity Interface Reporting	This Dashboard provides administrator staff the ability to monitor and have access to all accounts balances with details about salary transactions, procurement information, accounts receivable, MARS, AP Payment registers, bank, and cash position. It also provides various search options related to current requests they receive on a day-to-day basis.	Sponsored Program Administration	1303	3860																																																																																																																											
Financial Reports-Resource Expenditure Report (ARR)	This Dashboard provides a system-wide view of all resource expenditure activity within Research & Innovation. The report within this dashboard displays expenditures in summary by campus and is used to monitor corporate expenditures with other related capabilities.	CRM & Sponsored Programs	508	123																																																																																																																											
Financial Reports-Sponsored Program Activity Report (SAR)	This Dashboard provides a system-wide view of the current level of sponsored program activity administered by the RF as it prepares to fulfill its primary user. Each section has RF-related capability to view related reports and can drill down to data. Information Users can drill down further to access award/project-specific information using the RF Activity Interface Reporting Dashboard.	CRM & Sponsored Programs	289	245																																																																																																																											
Financial Reports-Expenditure Profile Report (EPR)	This Dashboard breaks out expenditures by campus into the following categories: Sponsor, Organization, Program, Historical Program, and by Financial Center. Each section has RF-related capability to view related reports and can drill down to data. Information Users can drill down further to access award/project-specific information using the RF Activity Interface Reporting Dashboard.	CRM & Sponsored Programs	274	122																																																																																																																											
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Enterprise Application Services	ITS	John Paris	Jaya Chavali	Inteum / Minuet / Inventor Portal: Provide centralized contracting with vendor and by request support and maintenance for mission critical RF Enterprise Application Inventor Portal/Minuet.	Operational Support & System Upkeep: <ul style="list-style-type: none">• Ensure applications meet security and compliance/system requirements. Such as:<ul style="list-style-type: none">○ Enable Multi Factor Authentication through Single Sign On (SSO)○ Password criteria○ Encryption (Transit, Rest)• Provide business analysis support• Day-to-day support of the application:<ul style="list-style-type: none">○ Address RFCO & campus inquiries/issues related to login issues																																																																																																																										

Function	Business Area	Function Owner / VP	Function Leader	Function Description	Activities performed at Central Office	Activities performed at the Campus
					<ul style="list-style-type: none"> ○ Provide data analytics and reporting using integrated data from the application ○ Reconciliation activities ○ Analyzing and resolving service requests <p>Integrations:</p> <ul style="list-style-type: none"> • Maintain and support internal application integrations between Inteum/Minuet, Report Center and Oracle E-Business Suite <p>Misc:</p> <ul style="list-style-type: none"> • Centralized contract negotiations and oversight with the vendor 	
Enterprise Application Services	ITS	John Paris	Jaya Chavali	Pre-Award & Compliance Services (PACS): Provide support and maintenance for mission critical RF Enterprise Application Pre-Award & Compliance Services (PACS).	<p>Services include but are not limited to:</p> <p>Operational Support & System Upkeep:</p> <ul style="list-style-type: none"> • Implement application changes to meet the federal and state regulatory mandates and requirements <ul style="list-style-type: none"> ○ Collaborate with RFCO business leads/liaisons to comprehend mandates, information sources and impact to RF applications • Ensure applications meet patching, security and compliance/system requirements. Such as: <ul style="list-style-type: none"> ○ Enable Multi Factor Authentication ○ Password criteria ○ Encryption (Transit, Rest) ○ Monthly required patch releases from the vendor 	<ul style="list-style-type: none"> • Providing front line support for campus end user questions • Provide input on requirements for campus specific enhancements • Participate in user acceptance testing for systems changes • Act as liaison between the center office and campus faculty and other user communities • Complete user access administration activities for their own campus locations: University at Albany, Binghamton University, SUNY Brockport, Buffalo State University, SUNY Cobleskill, SUNY Delhi, Empire State College, SUNY College of Environmental Science and Forestry, SUNY Fredonia, SUNY Geneseo, SUNY New Paltz, SUNY Oneonta, SUNY Optometry, SUNY Oswego, SUNY Plattsburgh, SUNY

Function	Business Area	Function Owner / VP	Function Leader	Function Description	Activities performed at Central Office	Activities performed at the Campus
					<ul style="list-style-type: none">○ S2S patches based on OMB patch release schedule & campus need.• Provide business analysis support related to process reengineering, which includes working with campuses and central office departments to evaluate and develop enhancements that will lead to operational efficiencies• Support & maintain several modules in PACS:<ul style="list-style-type: none">○ Grants○ Agreements○ COI○ IACUC○ IRB○ Safety• Day-to-day support of the application:<ul style="list-style-type: none">○ Address RFCO & campus inquiries/issues○ Provide data analytics and reporting using integrated data from multiple applications○ Org & User Management○ Reconciliation activities caused by data issues○ Training on the RF Business System○ Analyzing and resolving service requests○ Facilitate governance group discussions	<p>Potsdam, SUNY Upstate Medical University.</p> <ul style="list-style-type: none">• Provide user access administration as well as system infrastructure for campus implementation of PACS - University at Buffalo (Click) & Stony Brook University (MyResearch)

Function	Business Area	Function Owner / VP	Function Leader	Function Description	Activities performed at Central Office	Activities performed at the Campus
					<ul style="list-style-type: none">○ Responsible for the daily (M-F) run of bulk import files related to:<ul style="list-style-type: none">• Sponsor information• People information• Provide necessary materials, documentation, access to RF Audit team as needed <p>Strategic Planning:</p> <ul style="list-style-type: none">• Generate and maintain a 5-year Rolling Roadmap• Partner and negotiate with the vendor to ensure that the RF needs are incorporated into the application• Regularly work with the vendor to identify and outline future project cost• Collaborate with the Project Oversight & Governance Group (POGG) and discuss strategy projects and initiatives related to the Huron application <p>Project Initiatives:</p> <ul style="list-style-type: none">• Enhance application functionality to meet the needs of 29+Campuses and RFCO<ul style="list-style-type: none">○ When approved work with the vendor throughout the SDLC to document and test○ Enhancements are shared with Stony Brook University, but it is up to them to decide when/if to apply	

Function	Business Area	Function Owner / VP	Function Leader	Function Description	Activities performed at Central Office	Activities performed at the Campus
					<ul style="list-style-type: none"> Participate in planned upgrades to application and database as new versions are released by the vendors to ensure application meets support requirements <p>Integrations:</p> <ul style="list-style-type: none"> Maintain and support internal application integrations with Report Center and Oracle E-Business Suite <p>Misc:</p> <ul style="list-style-type: none"> Support campus specific initiatives by providing: <ul style="list-style-type: none"> Insights on RF applications functionality & data Input on any business process reengineering (BPR) items Design & functionality impacting RF Conversion & data needs Interfaces & data exchanges Campus adoptions & configurations of system modules 	
Enterprise Application Services	ITS	John Paris	Jaya Chavali	<p>Employee Compensation Compliance (ECC): Provide support and maintenance for mission critical RF Enterprise Application Employee Compensation Compliance (ECC).</p>	<p>Services include but are not limited to:</p> <p>Operational Support & System Upkeep:</p> <ul style="list-style-type: none"> Ensure applications meet the security and compliance standards. Such as: <ul style="list-style-type: none"> Enable Multi Factor Authentication Password controls Encryption (Transit, Rest) Quarterly critical patch updates 	<ul style="list-style-type: none"> Providing front line support for campus end user questions Provide input on requirements for campus specific enhancements Participate in user acceptance testing for systems changes Act as liaison between the center office and campus faculty and other user communities

Function	Business Area	Function Owner / VP	Function Leader	Function Description	Activities performed at Central Office	Activities performed at the Campus
					<ul style="list-style-type: none">• Generate and maintain a 5 year Rolling Roadmap<ul style="list-style-type: none">○ Regularly work with the vendor to identify and outline project cost• Day-to-day support of the application:<ul style="list-style-type: none">○ Address RFCO & campus inquiries/issues○ Responsible for the weekly run of 6 bulk import files related to sponsor, departmental, people/roles, projects, and payroll○ Analyzing and resolving service requests and when necessary, raise data into the application these requests with the vendor for resolution <p>Strategic Planning:</p> <ul style="list-style-type: none">• Generate and maintain a 5-year Rolling Roadmap• Regularly work with the vendor to identify and outline future project cost <p>Project Initiatives:</p> <ul style="list-style-type: none">• Enhance application functionality to meet the needs of 29+Campuses and RFCO• Upgrade the technical stack as new versions are released by the vendors to ensure application meets support requirements	

Function	Business Area	Function Owner / VP	Function Leader	Function Description	Activities performed at Central Office	Activities performed at the Campus
					<ul style="list-style-type: none"> Implement application changes to meet the federal and state regulatory mandates and requirements Liaison with vendor on enhancement design, requirement analysis & functionality specific to RF <ul style="list-style-type: none"> Testing of enhancements as delivered by the vendor <p>Misc: Support campus specific initiatives by providing:</p> <ul style="list-style-type: none"> Insights on RF application functionality & data as needed Provide audit with applicable reports when reviewing campus processes relating to certification of effort Annually configure campus specific certification periods for the upcoming calendar year 	
Enterprise Application Services	ITS	John Paris	Duane Mysliwiec	<p>Application Database Administration: Design, deploy, maintain, monitor and upgrade mission critical RF Enterprise and ITS Operational Applications and databases.</p>	<ul style="list-style-type: none"> Evaluate technology features and products to meet business requirements. Design, develop and maintain automation routines to meet monitoring and operations requirements. Perform application, database and server monitoring and performance tuning to meet customer response times. 	

Function	Business Area	Function Owner / VP	Function Leader	Function Description	Activities performed at Central Office	Activities performed at the Campus
					<ul style="list-style-type: none"> • Provide 24x7 support for nightly operations and maintenance outages. • Provide Tier 3 level technical trouble shooting and consultation to ITS Business Analysts, Data Services and Development teams and Third-Party Customer Service team. • Design, implement, monitor and maintain Identity Management solutions (i.e. single sign-on (SSO), multi-factor authentication (MFA)) to ensure compliance and user requirements are met. • Analyze, prioritize, apply and configure application and database security recommendations to remediate known vulnerabilities. 	
Enterprise Application Services	ITS	John Paris	John Li	Communication: Develop and execute a communication protocol for Enterprise Applications, ensuring timely updates on maintenance, upgrades, security enhancements, and other critical changes. Focus on delivering clear, concise, and actionable information to stakeholders, enhancing transparency, minimizing disruptions, and	<ul style="list-style-type: none"> • Provide consistent communication regarding maintenance schedules, system upgrades, security enhancements, and other critical changes. • Ensure information is tailored to stakeholders' needs, delivered in a concise and actionable format. • Enhance user preparedness by proactively sharing updates and minimizing disruptions to workflows. 	

Function	Business Area	Function Owner / VP	Function Leader	Function Description	Activities performed at Central Office	Activities performed at the Campus
				promoting user readiness.		
7. Website Services	ITS	John Paris	Jaya Chavali	Provide support and maintenance for the RF website.	<p>Services include but are not limited to:</p> <p>Operational Support & System Upkeep:</p> <ul style="list-style-type: none"> Implement site changes to meet the federal and state regulatory requirements <ul style="list-style-type: none"> Collaborate with RFCO business leads/liaisons to comprehend mandates, information sources and impact to RF website Ensure website meets security and compliance standards <ul style="list-style-type: none"> Oversight of onboard/offboard process for collaborator access management Global oversight of web content adherence to website best practices Ensuring the policies, procedures and other web content is up to date based on input from RFCO departments Day-to-day support of the website: <ul style="list-style-type: none"> Address RFCO & campus inquiries/issues Provide data analytics and reporting using integrated data from Google Analytics as needed User management 	<ul style="list-style-type: none"> Provide input on website page requirements for campus specific enhancements Participate in user acceptance testing for larger website update initiatives

Function	Business Area	Function Owner / VP	Function Leader	Function Description	Activities performed at Central Office	Activities performed at the Campus
					<ul style="list-style-type: none"> ○ Training on the RF Content Management System and other communication tools ○ Analyzing and resolving service requests ○ Broken link reporting and resolution <p>Project Initiatives:</p> <ul style="list-style-type: none"> • Work collaboratively with RF SUNY departments & SUNY partners to enhance website functionality to meet the needs of campuses, RFCO and public web visitors. Advise project teams on: <ul style="list-style-type: none"> ○ Webpage design guidelines ○ Improving UX/UI experience ○ Front-end web development <p>Misc:</p> <ul style="list-style-type: none"> • Maintain knowledge of website management, products & administration • Participate in website management communities of practice to stay informed of best practices 	
8. 3 rd Party Application Support	ITS	John Paris	Jaya Chavali	Provide support and maintenance for use of mission critical 3rd Party Applications.	<p>Services include but are not limited to:</p> <p>Operational Support & System Upkeep:</p> <ul style="list-style-type: none"> • Complete annual renewals for 30+ campus locations depending on the application requirements • Campus configurations for 3rd party applications 	<ul style="list-style-type: none"> • Providing front line support for campus end user needs • Provide input on campus specific applications requiring RF registration or changes • Act as liaison between the center office and campus faculty and other user communities • Complete user access administration activities depending

Function	Business Area	Function Owner / VP	Function Leader	Function Description	Activities performed at Central Office	Activities performed at the Campus
					<ul style="list-style-type: none"> On behalf of the campuses request enhancements to be made to the vendor application Day-to-day upkeep of 3rd party applications: <ul style="list-style-type: none"> Address RFCO & campus inquiries/issues User and organization management Provide login assistance Analyzing and resolving service requests Work with vendors to estimate costs and ensure timely payment (if required) <p>Integrations:</p> <ul style="list-style-type: none"> Support CITI Program integration with RF applications <p>Misc:</p> <ul style="list-style-type: none"> Respond to application changes made by the system owners 	on the 3 rd party application and availability to delegate such responsibility to campus administrators
9. Passthrough Management	ITS	John Paris	John Li	Manage technology inventory, budgets, and vendor collaborations.	<p>Technology Inventory and Budget Management:</p> <ul style="list-style-type: none"> Maintain a comprehensive record of all technologies utilized by RFCO and campuses. Budget and track costs to ensure technology purchases and renewals remain within budget. <p>Vendor Management and Technology Evaluation:</p> <ul style="list-style-type: none"> Engage in ongoing negotiations and vendor assignments to assess the value of these technologies, 	

Function	Business Area	Function Owner / VP	Function Leader	Function Description	Activities performed at Central Office	Activities performed at the Campus
					support enterprise operations, and maximize efficiency.	
10. Project Portfolio Management (PPM)	ITS	John Paris	John Li	Oversee and align projects and resources with the Research Foundation's strategic goals, ensuring efficient execution, optimal resource allocation, effective communication, and value-driven prioritization through refined methodologies and PPM technology management.	<p>Strategic Alignment:</p> <ul style="list-style-type: none">Oversee a portfolio of projects and programs, aligning efforts to achieve the Research Foundation's strategic goals. Focus on delivering superior service, enhancing operational efficiency, and optimizing cost effectiveness. <p>Project Selection and Prioritization:</p> <ul style="list-style-type: none">Manage the evaluation and prioritization of projects to ensure alignment with the Research Foundation's strategic goals. Focus on selecting initiatives that deliver the most value by considering factors such as impact, cost, risk, and deadlines, enabling optimal resource allocation and attention to high-priority efforts. <p>Resource Allocation:</p> <ul style="list-style-type: none">Assess and manage resource time and effort to align with the Research Foundation's strategic goals. Focus on optimizing resource utilization to support high-priority initiatives and achieve desired outcomes. <p>Project Management Methodology:</p> <ul style="list-style-type: none">Evaluate and refine the processes used to initiate, plan, execute, monitor, control, and close projects. Focus on enhancing efficiency, consistency, and	

Function	Business Area	Function Owner / VP	Function Leader	Function Description	Activities performed at Central Office	Activities performed at the Campus
					<p>alignment with the Research Foundation's strategic goals.</p> <p>PPM Technology Management (TeamDynamix):</p> <ul style="list-style-type: none"> Configure, update, and oversee the application to streamline and automate project management processes. Estimate the time and resources needed to complete projects, while consolidating information for stakeholders to access, analyze, and use in developing strategic insights. <p>Communication Management:</p> <ul style="list-style-type: none"> Design and implement a communication plan to ensure the successful delivery of projects. Facilitate regular updates on project progress, milestones, and timelines, while addressing potential risks and changes proactively. Focus on providing clear, concise, and actionable information to stakeholders, fostering collaboration, managing expectations, and ensuring alignment with project goals 	
11. Window Server Support	ITS	John Paris	Duane Mysliwiec	Ensure all Windows servers are operating efficiently, are scanned for vulnerabilities on a regular basis and remediated in a timely manner based on risk and impact.	<ul style="list-style-type: none"> Provide redundant systems where needed and keep the operating systems and patching up to date. 	

Function	Business Area	Function Owner / VP	Function Leader	Function Description	Activities performed at Central Office	Activities performed at the Campus
12. Voice, Video, and VoIP	ITS	John Paris	Duane Mysliwiec	Provide a solution that provides a communication platform allowing users to initiate and receive calls internally and externally.	<ul style="list-style-type: none"> • Provide a solution that allows both incoming and outgoing phone calls • Provide a solution that allows voicemail • Provide the ability to access this system on-site or remote for hybrid working conditions 	<ul style="list-style-type: none"> • Assist in troubleshooting when required to ensure proper communication.
13. Desktop Support Services	ITS	John Paris	Duane Mysliwiec	Provide on premises 8 x 5 support to resolve any issues that may arise on a daily basis. Have other levels of support for this person to reach out to for more complex issues	<ul style="list-style-type: none"> • Ensure all desktops, laptops, printers and peripherals are running as expected. • Keep operating systems up to date to minimize cyber risks • Keep applications up to date to enhance performance and minimize cyber risks • Ensure users have the ability to work wired and wirelessly • Ensure users have the ability to work on prem and remote 	
14. RFCO Technology Services	ITS	John Paris	Duane Mysliwiec / Jaya Chavali	Act as an internal consulting body for our users for questions on hardware or software they may want to utilize in their departments. We typically include the SecOps team for their input from a security perspective.	<ul style="list-style-type: none"> • Assist departments with the following: <ul style="list-style-type: none"> ○ Software acquisitions ○ Software upgrades ○ Help with the budget process around procuring and maintaining applications ○ Contract negotiations ○ Cyber security controls to minimize risk to the organization 	

*Note: Functions with an asterisk indicate that **not all** work done in the function will have pre-defined processes identified; rather they may use established processes in other functions to achieve their business goals.