

*Developing
Mechanisms & Tools
in a Hybrid
Work Environment*

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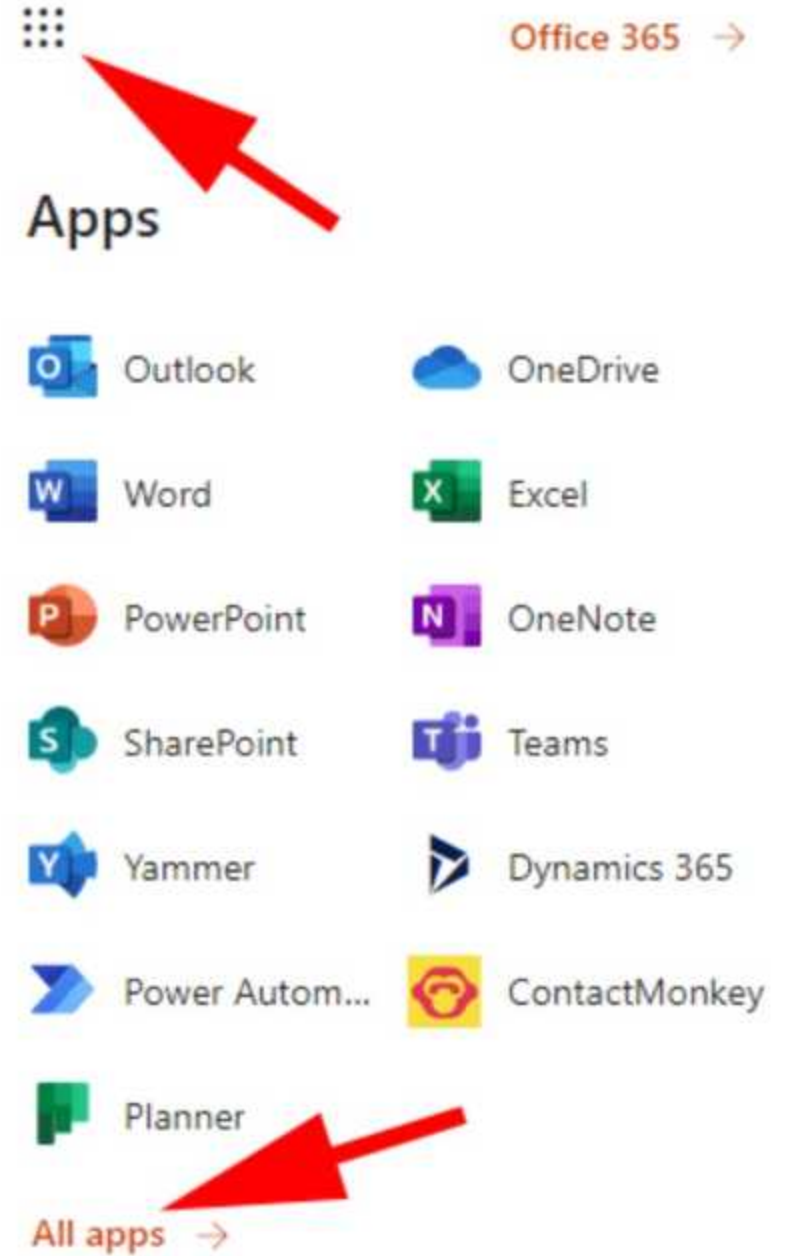
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Mechanisms & Tools for Communication, Collaboration, and Engagement

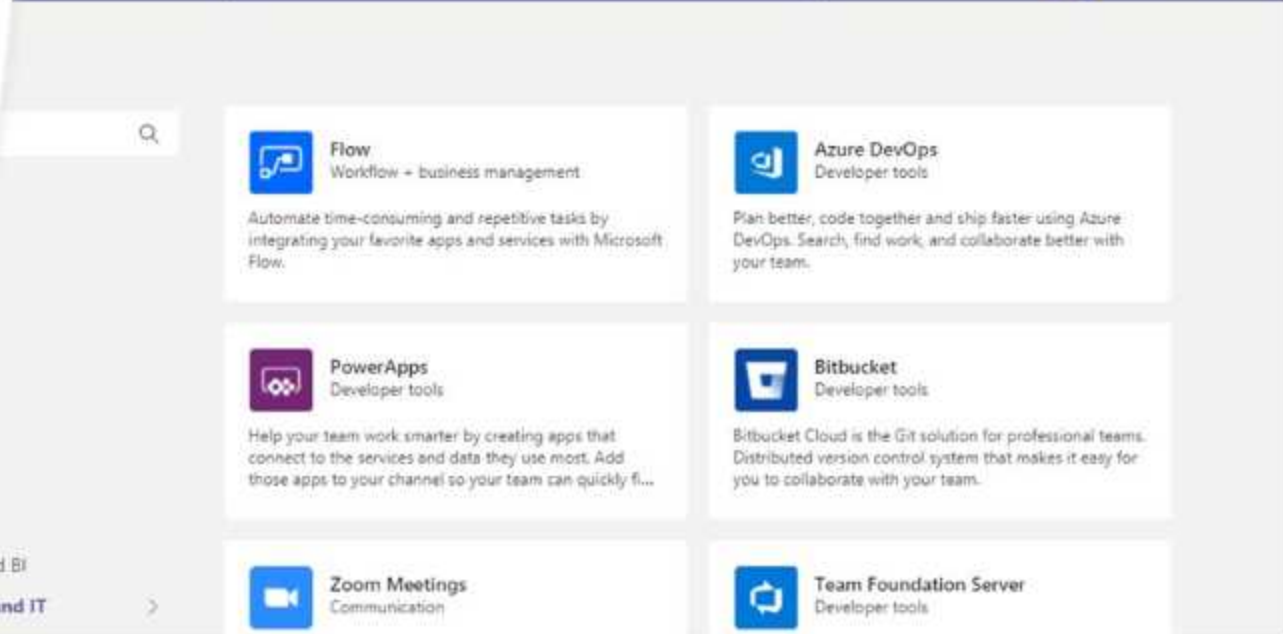
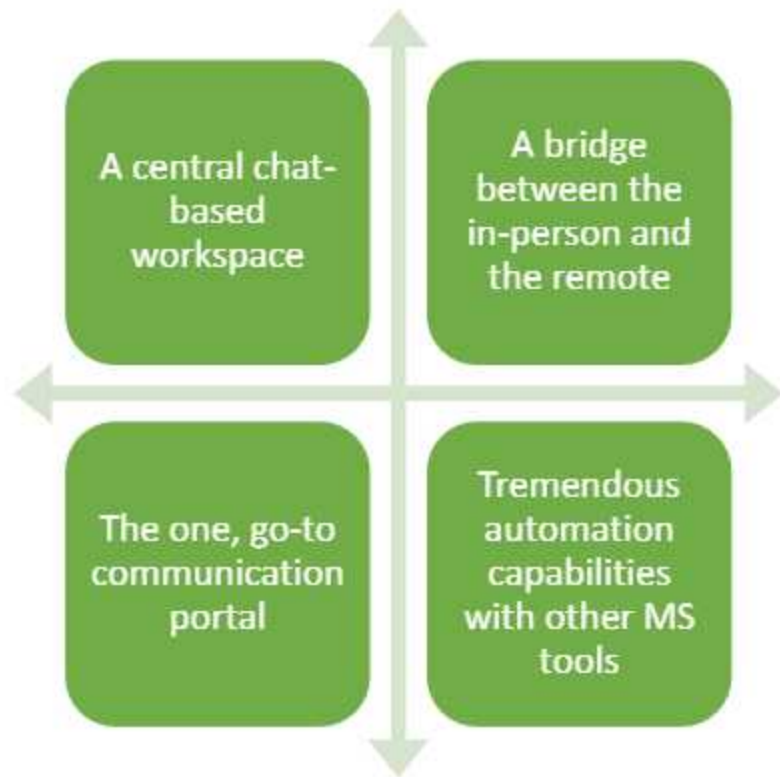


Mechanisms & Tools for Communication, Collaboration, and Engagement

- Microsoft Office Suite offers:
 - Teams
 - SharePoint
 - Forms
- But how we know when we should be using what?



Microsoft Teams: Capabilities



Microsoft Teams: Compliance Uses



HOSTING WEEKLY TEAM
CHECK-INS



PLANNING THE NU-RES
RETREAT



ESTABLISHING SUBSET
GROUP CHATS



DATA ENCRYPTED
MEETINGS, GROUP
CHATS, CALLS, AND
PERSONAL/SHARED FILES

The screenshot displays the Microsoft Teams interface. On the left, a list of teams is shown: 'Train I.T Now Ltd' (with channels: General, Marketing, Sales), 'Friday Drinks Crew', 'Customer Service', 'Project Delta', and 'Southern Trading Co.' (with channel: Q2 Targets). The 'Southern Trading Co.' team is selected, and a context menu is open over it. The menu items are: 'Hide', 'Manage team' (highlighted with a red box), 'Add channel', 'Add member', 'Leave the team', 'Edit team', 'Get link to team', 'Manage tags', and 'Delete the team'. At the bottom of the context menu, there is a red box containing three dots (⋮).



Microsoft SharePoint: Capabilities



An organizational intranet portal for content & site management



A central automation hub

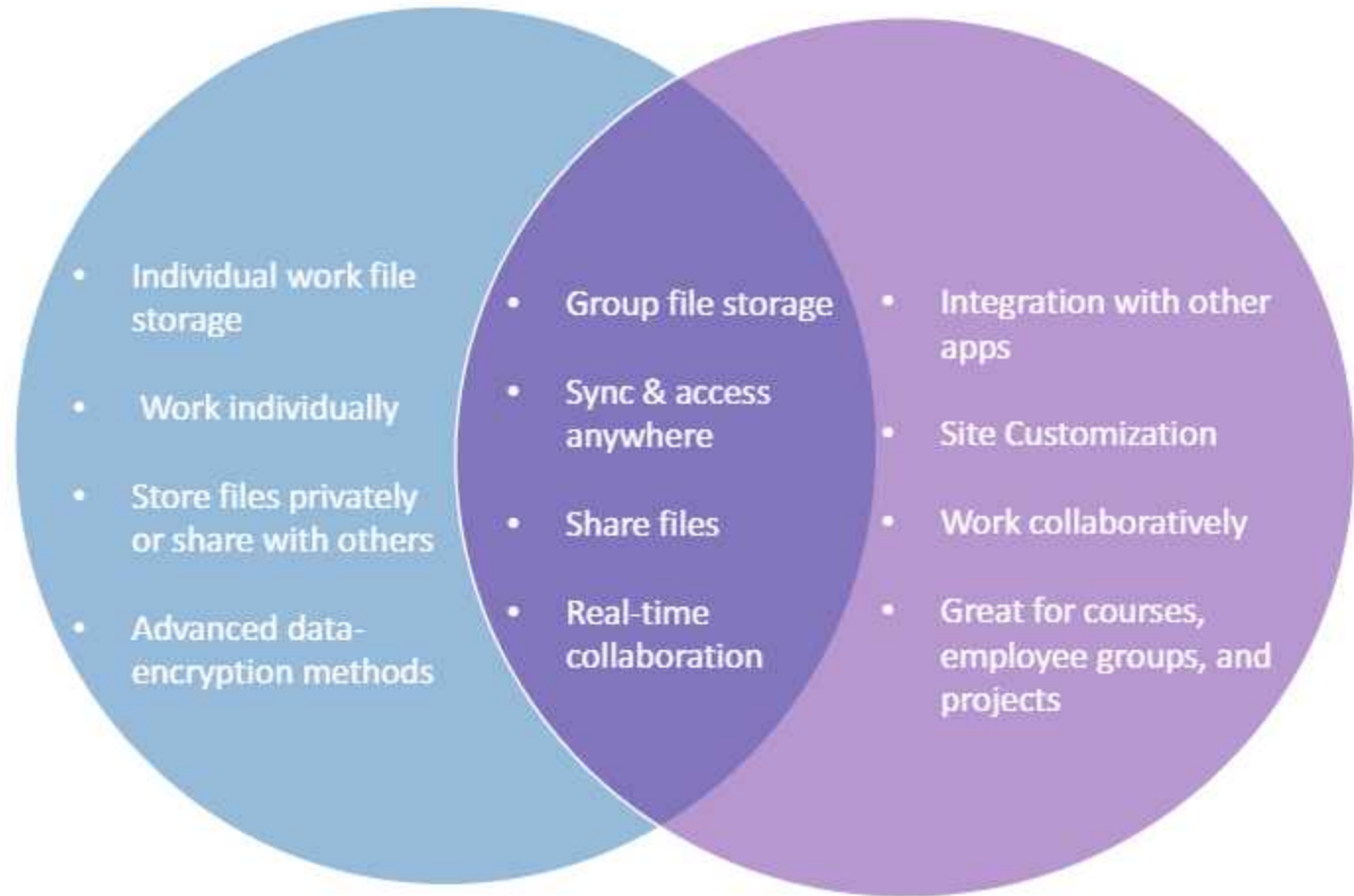


A central collaboration hub



A central data management hub

Microsoft OneDrive vs SharePoint



Microsoft SharePoint: Advanced Uses

Dynamic Document
System

Home-based Intranet

Highly Customizable
Interface

Microsoft SharePoint: Compliance Uses

News from sites



Workday

Training Resources

 Fajardo, Hector
1/14/2022

3960 views





Workday

Workday@Northeastern News

 Fajardo, Hector
12/20/2021

36 views





Workday

Workday@Northeastern News

 Fajardo, Hector
12/18/2021

1553 views



Onboarding & Workday Resources

Collaborating on NSF Audit Prep

Planning NU-RES Conference

Data Classification training at Northeastern

Frequent sites

NU-RES Compliance Group

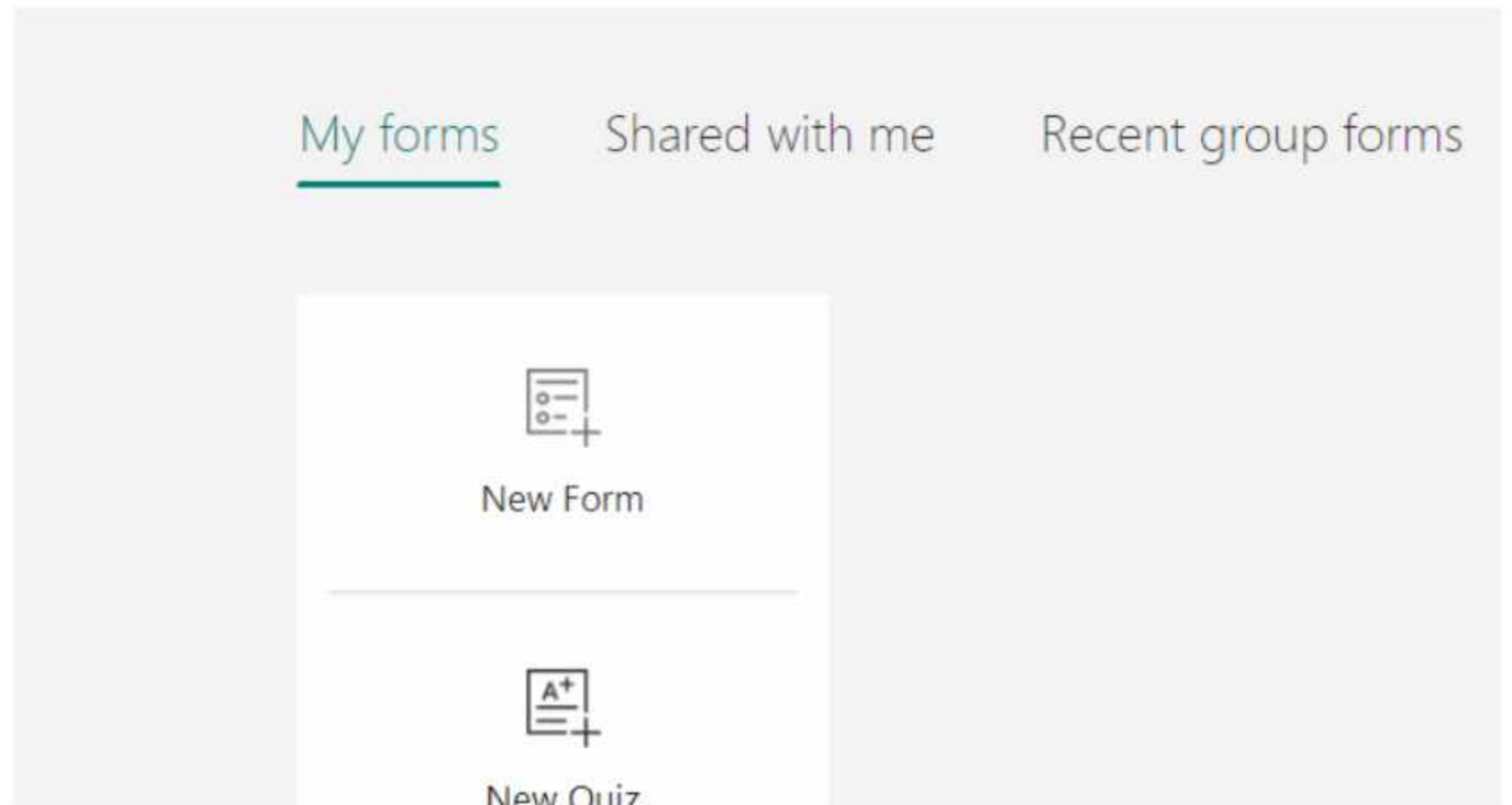
NU Research Admin Retreat Group

NU-RES-Internal - NSF Audit Prep

Workday

Microsoft Forms: Capabilities

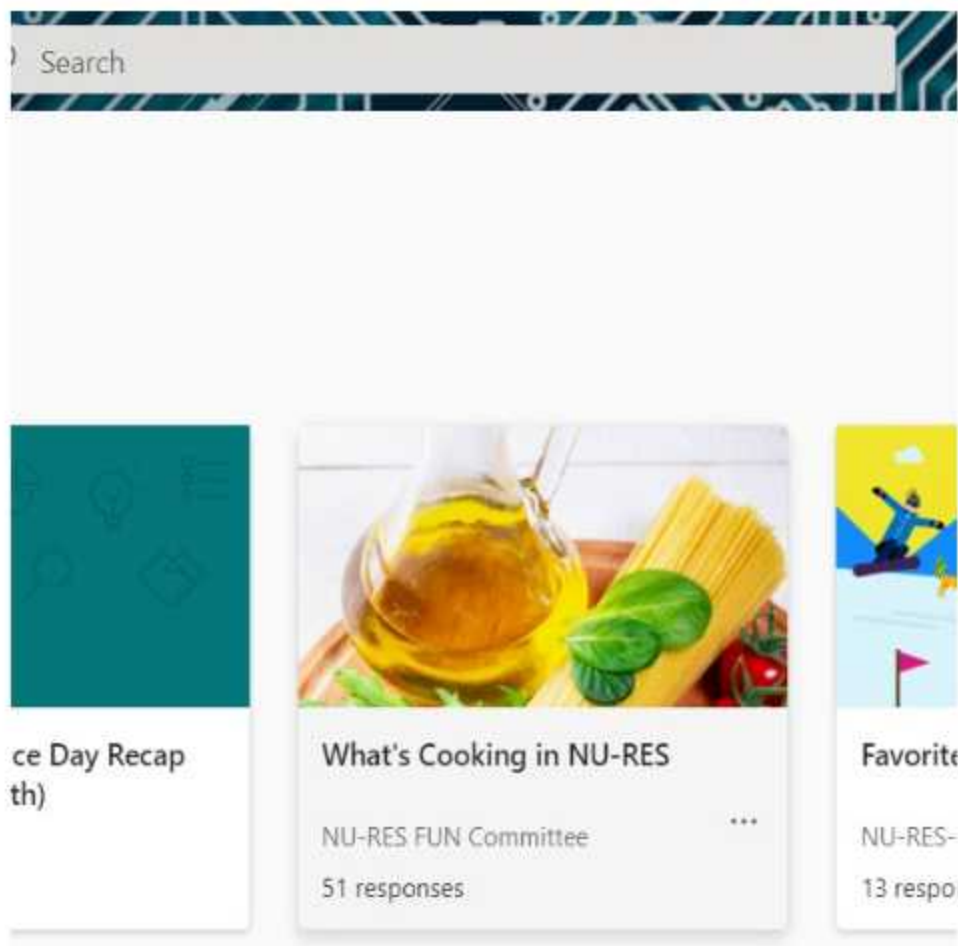


 Forms + Excel Builds a live data connection between Microsoft Forms and Excel.	 Forms + Teams Easily set up a Forms tab to communicate and interact with your team.	 Forms + SharePoint Create a form, collect responses, and show survey results right on your site.
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Data Collection/Assessment

Integrative Real-Time Data

Workflow Automation



Microsoft Forms: Compliance Uses

COMPLIANCE

Compliance Committees & Programs

- Financial Conflict Of Interest
- Stem Cell Research Oversight (SCRO)

Controlled Unclassified Information (CUI)

Export Control

- Export Control Export License Inquiry Decision Tree

Do you need a Technology Control Plan?

International Engagements Compliance

- International Engagement Intake Form

NSF Award Compliance Program

- About
- Compliance Officer



International Engagements Intake



NU-RES Internal Surveys



Collaborating on a NU-RES Recipe Book

International Engagement Intake Form

Note: You must be logged in to your myNortheastern account to submit this form. If you cannot see the form, please click "Fill out the form" below to log in.

International Engagement Intake Form

Hi, Wilson. When you submit this form, the owner will see your name and email address.

1. Name

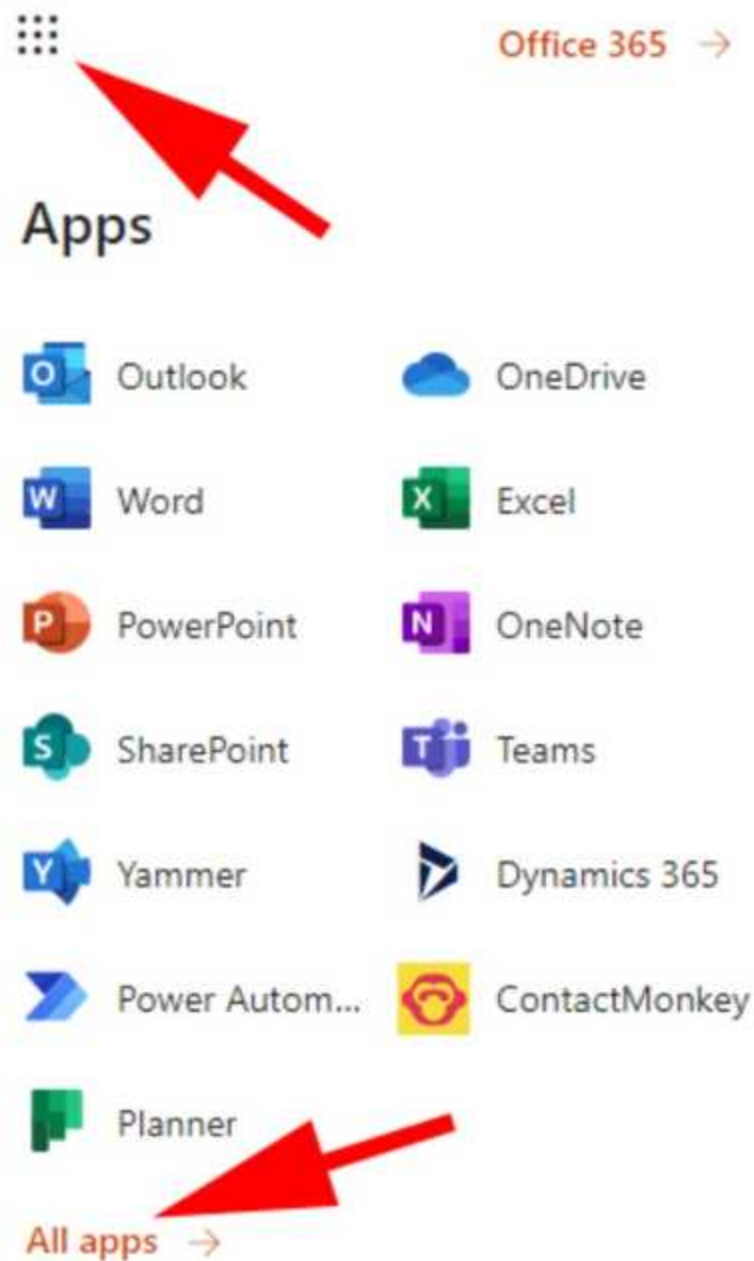
2. Email

Workflow and Data Management Mechanisms



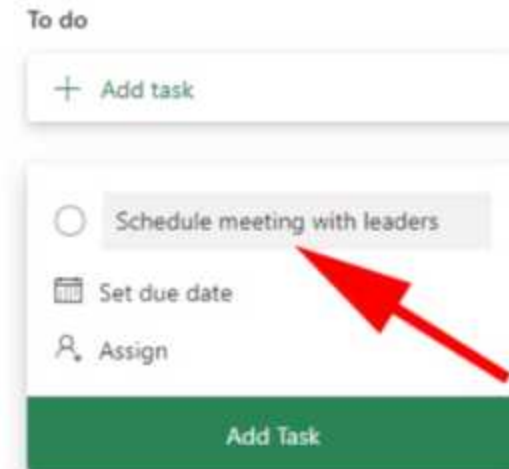
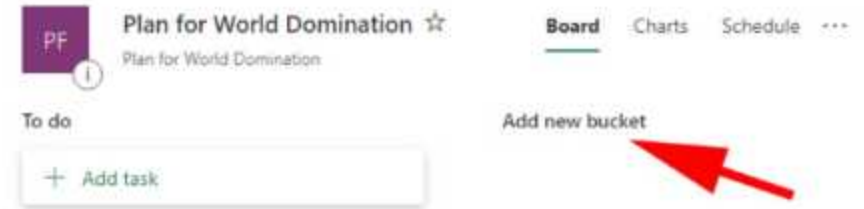
Workflow and Data Management

- Microsoft Office Suite offers:
 - Planner
 - Lists
 - Excel
- But how do we know when we should be using what?



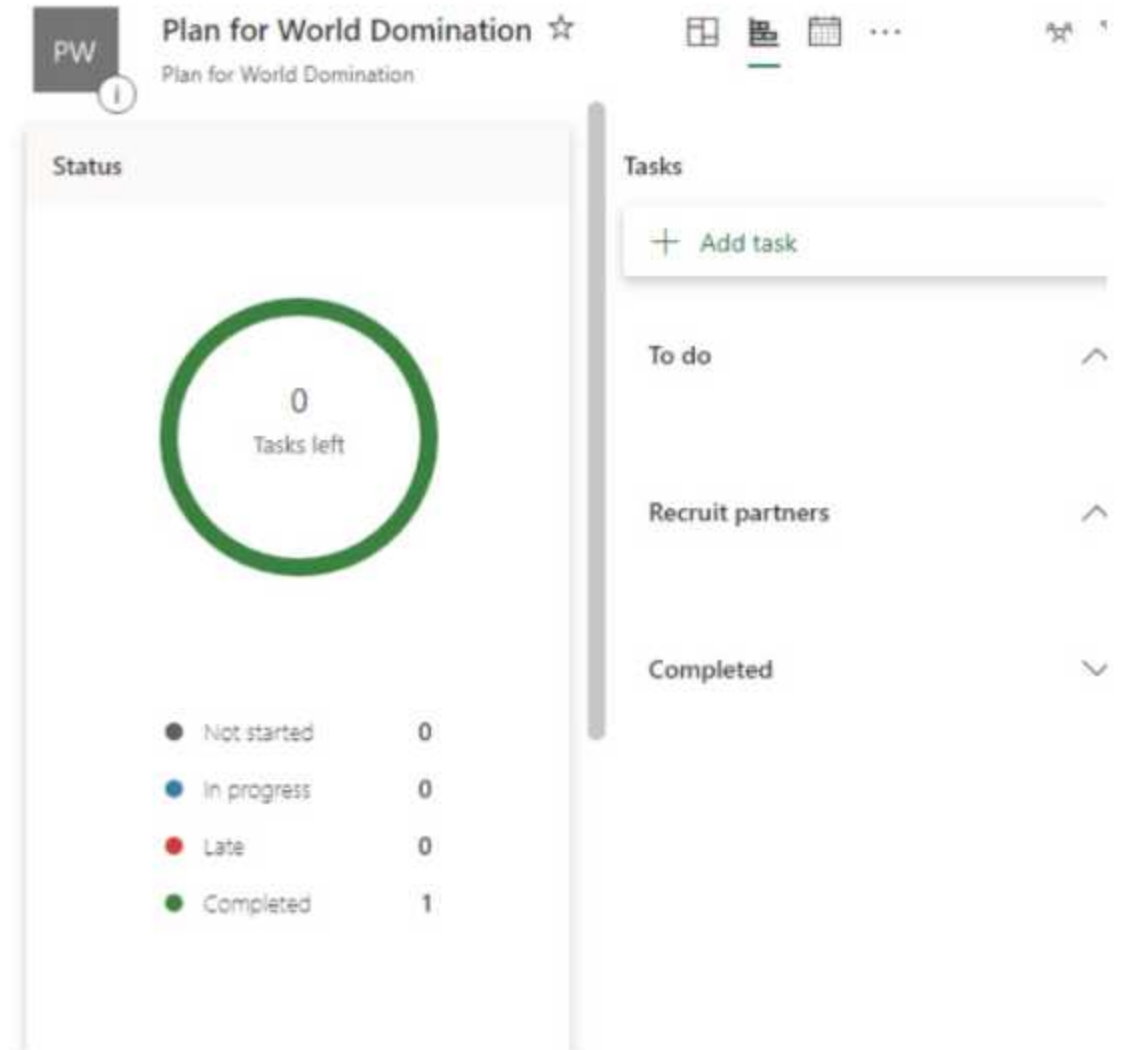
Planner

- Planner is an effective tool for management of assignments in flight or overall team management
- “Buckets” feature offers the capability of placing aspects of a project or individual team members into silos
- Tasks within buckets can be named accordingly and assigned across various members of the team or working group
- Due dates can also be assigned to individual tasks
- Tasks and buckets can be labeled to better categorize work



Planner

- While workflow is a huge piece of Planner, data management is also a key feature
- In addition to bucket the feature which shows tasks and assignments in a bulletin board fashion, there are the Charts and Schedule feature
- “Charts” offers diagnostic reporting on the progress made on plans laid out within the buckets
- “Schedule” translates information from charts into a calendar format



When would we use Planner?



Best for overseeing individual team members' progress towards independent projects, as well as progress within a collaborative effort on a set project



An independent project would be listed under a team member's own bucket



A collaborative effort will hold its own bucket, while tasks within buckets are divided across the team

i.e. our team has buckets for the different areas of compliance such as policy, training, and export controls review



Promotes efficiency and accountability

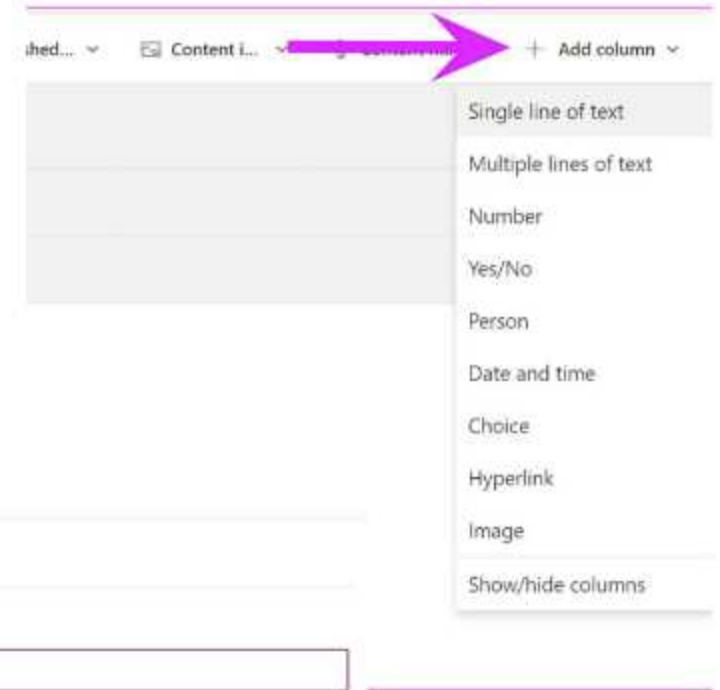


Excel vs. Lists?

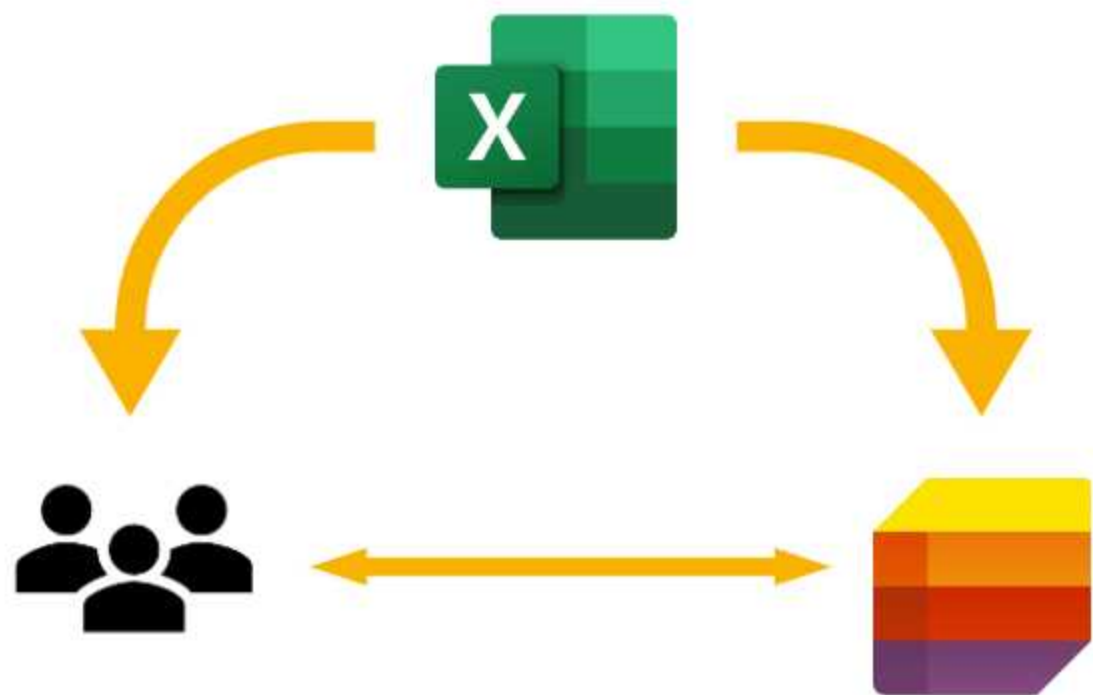
- Excel is an incredible tool for data organization and storage
- It is also important for the purpose of data manipulation and configuration through the development of graphs and charts
- Creating graphs and charts with data input into lists is not available

Excel vs. Lists

- Lists is a helpful tool in managing complicated and ongoing projects or work in flight
- Lists takes the best features of the previously discussed apps
- Capability of importing an excel spreadsheet to take data pulled from external reports
- There are more options for the fields within rows and columns
 - i.e. fields can link to other apps in Microsoft like planner, other lists, forms, and also offer option to assign fields to team members

A screenshot of the Microsoft Lists 'New item' form. The form contains several fields: 'Content title *' with a text input field containing 'Enter value here'; 'Description' with a larger text area containing 'Enter value here' and a sub-label 'Describe the content in a few words'; 'Status' with a dropdown menu showing a dash; 'Draft due by' with a date input field containing 'Enter a date' and a calendar icon; and a date field showing '12:00 AM' with a dropdown arrow. The label 'Date when the draft is due' is visible at the bottom.

Advanced use – Putting it all Together

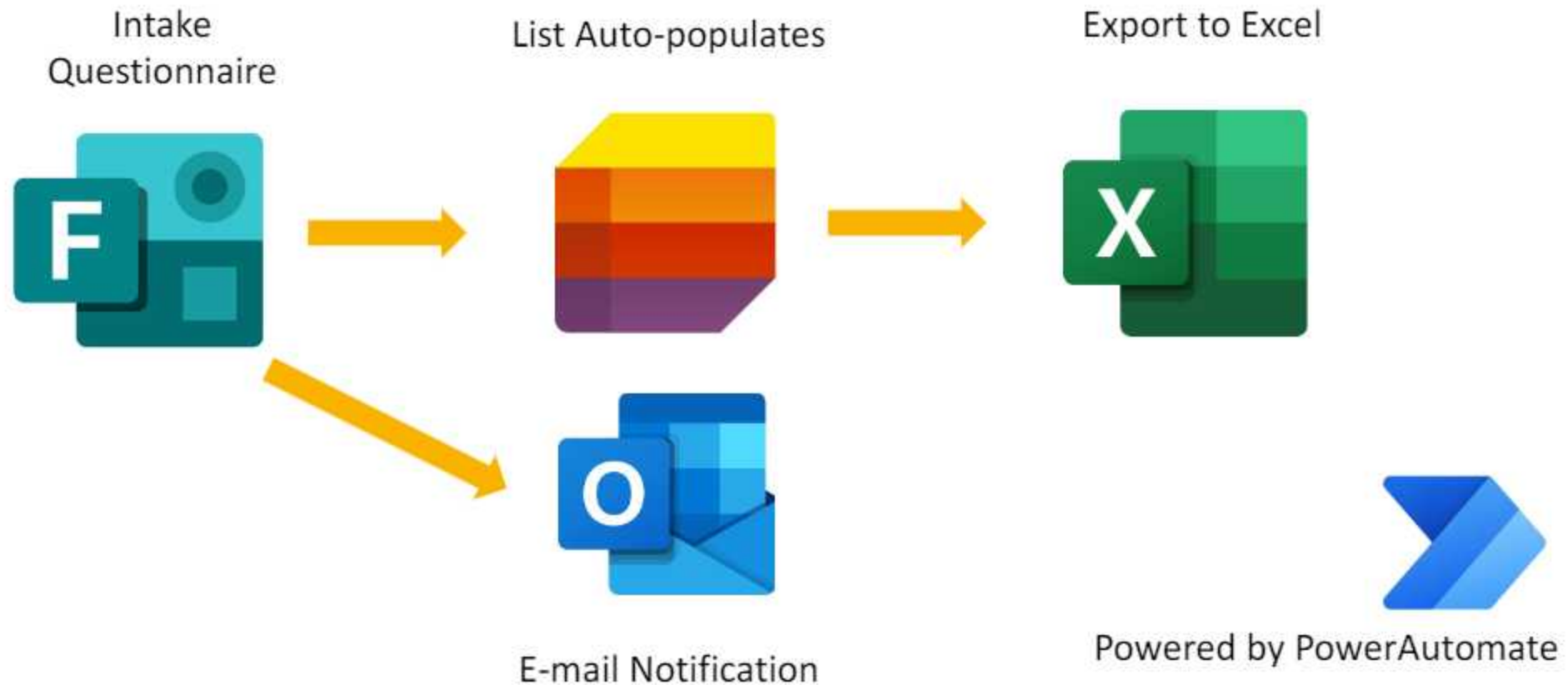


No Cost Extension review

- Weekly reports run in Excel
- Comment & Versioning Functionality
- Assignments
- Views

Advanced use – Putting it all Together

International Engagement Review





Questions?



Thank You!

**LVX
VERITAS
VIRTUS**