- **Search Functionality**
  - New feature on Ad Hoc Reports screen
  - All information, including the files that are stored as attachments, is searchable.
  - Please note: In the ad hoc reporting function, step #3 (“Select the data to include”) will only limit the fields of data returned in your report output, not the fields searched. *Searches will always query all data fields in a given record*, thus a “search” ad hoc report will take a longer time to generate than other reports. It is recommended that you select “All Data” in step #3.

- **OSPA Data**
  - How to use the “Original Account Number” data field – (This is for all grants that are renewed after a period of time and that *keep the same grant name*)
    - ISSUE: The appearance of duplicate grant entries in reports and summary screen.
    - EXPLANATION: Entries *appear* as duplicates when the same grant is renewed [FYI: In the Research (OSPA) details screen the Account Number is loaded from the OSPA database when a grant is funded.]
    - USAGE: Find related grants and enter the same account number in the “Original Account Number” data field. This will “link” these related grants together for ease of searching and cleaner reporting.
  - Summary screen modifications on Research OSPA screen now includes: Status, Project Period, Budget Period, Account#
  - Editorial Errors in OSPA data – If spelling errors then user can contact OSPA to correct.
  - Other OSPA data issues – “College Contact” should ask their users to FIRST contact them, SECOND contact Jim. This will help determine if data gaps/Issues are occurring in SCREEN or REPORT (Report = Jim issue, Screen= DM or OSPA issue)

- **Reminders**
  - Best practices for scheduling faculty activities updates: This may depend on when reports are due. (Of course a unit may decide to set their own update schedule regardless of report due dates).
  - How are the Colleges notifying their faculty to update activities? Nursing- has one staff member entering faculty activities. The faculty emails their new activities to the staff member who updates their records.

- **Shared Data**
  - Best practices for contacting shared authors/staff to edit an entry: If there is an error in the activity shared with your faculty (whose data you are managing) it is recommended that you: *determine where the shared activity is coming from*: 1) DM record is in your unit then you can fix the error by “managing data” of the record owner. 2) DM record is not in your unit then: a) contact the record owner or staff who manages their data, or b) contact Jim.

- **College of Medicine Implementation**
  - Lana Spicer explained their success of the “Train the Trainer” model