

CISER

## Protecting Ivy-League Research Data with Strategic Automation

### Business Overview

The Cornell Institute for Social and Economic Research (CISER) maintains the highest standards of research support practices and data security, which includes collaborating and partnering with external experts. Founded in 1981, CISER provides full data lifecycle consulting and training services, cloud computing resources, and a progressive approach to secure data storage. All these elements work together to anticipate and satisfy the data and related computational requirements of Cornell's social science and economic disciplines. CISER provides all of these services in a unique way to support research with restricted data through its Cornell Restricted Access Data Center (CRADC).

### Challenges

CRADC has provided an advanced and effective method for working with and storing restricted project data for many years. As the number of research projects grew over the past decade, the data contract tracking system was no longer sufficient to meet its needs. A great deal of benefit could be gained from an updated, automated system.

**“Details are critical for successful research data management. The Agiloft tool’s functionality effectively supports tracking all required information in one database.”**

— Elena Goloborodko, CISER Secure Data Services Manager

number. Then they would move to the next sheet to report the project information and then to a database where they stored the project scope and researchers’ details. The system needed integration into one source of information to ensure effective access to information and dynamic reporting capabilities.

“The records keeping process consisted of maintaining several dispersed data sources,” CISER Secure Data Services Manager Elena Goloborodko said.

The Secure Data Services team kept track of restricted data projects in Excel documents and an online database. These documents were designed to capture the details of each project, including what type of contract was in effect and the necessary information to manage it. For every project, the Data Services staff would start in one Excel sheet, creating a project

**CISER** CORNELL INSTITUTE for  
Social and Economic Research

### Industry

- Education

### Challenges

- Manual and labor-intensive process for tracking data contracts
- Time-consuming to satisfy requests for reports
- Maintenance of multiple tracking sheets and emails
- Opportunity to institutionalize long-time employees’ acquired knowledge
- Opportunity to automate outbound project-related communications
- Opportunity for small team to partner in development of business analytics
- Opportunity to position for growth without increasing staff size

### Agiloft Benefits

- Well-established and proven reputation with top universities
- Proven ability to increase project lifecycle management efficiency
- Proven ability to increase report development efficiency
- Fixed governance rules safeguard operational and data integrity
- Intuitive interface allows non-technical administrator to create new functionality
- Automation of all workflows and communications ensures consistency and accuracy

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"With a growing number of projects, the old process needed a revision and new solution for consolidating projects' details in one database, robust search and reporting functionality for finding information easily and in timely manner."

With growing interest in and expanding opportunities for research with restricted data, CISER saw the advantages of improving the data contract management process. Streamlining and automating information gathering and communication flow would have their own benefits, as well as contribute to a solid foundation for reporting the department statistics.

## The Search

As a research institution, CISER understands the importance of data-driven analysis. They applied the same thoroughness to their search for a robust online solution to give oversight to their projects. The Agiloft product met all criteria for building a new model for data contracts management.

Agiloft's partner implementer Aytan Leibowitz, CEO of Spectrum Mobility, assured CISER that they could develop a solution tailored to their precise needs. "Aytan has been very helpful and dedicated to the successful implementation of Agiloft at CISER," Elena said. "He listened to our needs/concerns and provided solutions in an efficient manner. He continues supporting the product on an as-needed basis for staff training and for enabling new features. This relationship has been productive and successful."

"At CISER, there's an intricate relationship between projects, contracts, researchers, and restricted data," Aytan said. "We spent a lot of time on the front-end, conducting a thorough business analysis to determine the best way to design the system. As the saying goes, we measured twice and cut once."

## The Project

With Agiloft, Aytan and the team at CISER compiled all their discrete tasks into one automated, transparent solution. Now the process is simple and intuitive—communications, notifications, document

management, and tracking are all governed and executed according to the rules within the system framework.

In addition to the significant improvement in overall efficiency and centralization of data, the new data contracts management system offers robust information search and reporting capabilities. "From new project inception to project closeout, the Agiloft tool's logic guided the Secure Data Services staff through the processes and automated relevant communication flow," Elena said. "The Agiloft system incorporates checklists for the Secure Data Services staff to assure accurate completion of all steps."

"90% of required communications are now automated. The data contracts management process requires us to notify research teams about the project activation, expiration, closure, and user accounts' statuses throughout the project lifecycle. Before Agiloft, this process was manual and time-consuming."

— Elena Goloborodko

Agiloft has also automated CISER's welcome letters, account creations, reporting, and other key functions, pulling information from various fields within the application. "The Agiloft system has significantly improved the CRADC project-related communication process," Elena said. "90% of required communications are now automated. The data contracts management process requires us to notify research teams about the project activation, expiration, closure, and user accounts statuses throughout the project lifecycle. Before Agiloft, this process was manual and time-consuming. As an example, a project with ten researchers required ten individualized emails with user login information and ten additional emails for signing user agreements. To enable the users' access to the

of emails were generated manually. The Agiloft tool allows the Secure Data Services staff to activate these notifications by checking a box and clicking a button. Additionally, this process keeps track of the communication's history under the project's records, providing direct and easy access to the information. This improvement has significantly reduced the staff's time and created better traceability of the outbound project-related emails."

Managing restricted data use projects requires documenting all relevant communication (official contracts, email communications, user agreements, etc.). The Agiloft tool supports this by storing the documentation as attachments linked to each project. This method ensures the documents' traceability, plus easy access to the project details for quick response to a customer or making internal decisions/recommendations.

The Agiloft product has flexibility for tailoring the system's functionality to meet new requirements that have arisen since deployment. With Agiloft's user-friendly interface and flexible no-code architecture, the Secure Data Services staff can manage most changes to the system independently from the vendor. "Without having special assistance from Agiloft support, we were able to meet a request for new reporting by adding new data fields to the User Interface to enable the data collection. Changing the database configuration didn't take long and was easy and intuitive. The Agiloft system has improved the unit's reporting by consolidating the information in one place, supporting the ability to add new fields, search, and export the data. Being able to modify the system without the vendor's assistance takes the Agiloft experience to the next level," said Elena.

Agiloft's reporting features were a key functionality for CISER. Generating the department's statistics quickly and easily was one of the objectives of the Agiloft solution's implementation at CISER. This helped to significantly reduce staff time for producing routine and ad-hoc reports and opened an opportunity to collect new data points for measuring the department's growth.

## Solution Benefits

Agiloft has significantly increased the efficiency of CISER's project lifecycle management and its reporting. The ability to track the project-related data centrally in one data contract management system—Agiloft—has allowed CISER to efficiently respond to the breadth of inquiries and contract audits. Agiloft's configuration flexibility provides an opportunity to expand on tracking of various data. When there is a change in business requirements or request for capturing new information, the system can be adjusted to these changes right from the system's admin interface to provide the exact functionality, driving productivity even further. In an environment where accuracy is the top priority, Agiloft has established rules of governance and streamlined tasks to ensure consistency and operational integrity.

"With Agiloft, Spectrum Mobility was able to standardize CISER's process and make it streamlined and scalable."

— Aytan Leibowitz, Spectrum Mobility CEO

"Details are critical for successful research data management." Elena said. "The Agiloft tool's functionality effectively supports tracking all required information in one database. Recently, another Ivy League institution's data security group reached out to CISER for input regarding managing their restricted data workflow. We shared our experience with Agiloft—the contract management system that was tailored to our specific needs for tracking data use agreements, access approval protocols, user accounts, data inventory, project documentation, and delivery of a robust functionality for data reporting. The system is intuitive and easily configurable by someone who has no special training."

"With Agiloft, Spectrum Mobility was able to standardize CISER's process and make it streamlined and scalable," Aytan said. "Elena recently showed me

a report of the volume of projects they are handling now—there’s an impressive spike at the point when we introduced the Agiloft solution. It’s been a very successful implementation.”

### Let Us Show You

What Agiloft has done for CISER, it can do for you. Let us show you how. In a few hours, we can set up a custom proof of concept featuring your toughest business process. Give us a call to schedule a time.

### About Agiloft, Inc.

Organizations ranging from small enterprises to U.S. government agencies and Fortune 100 companies depend on Agiloft’s top-rated product suites for [Contract Management](#), [Service Desk](#), [Custom Workflow](#), and more. Agiloft specializes in automating processes that are too complex for competing vendors. Our best practice templates and adaptable technology ensure rapid deployment and a fully extensible system. For more information, visit <https://www.agiloft.com>.