

June 8th ORSS Research Forum Topics

- **Progress Report submissions**
 - **Protocols**
 - The fundsummary.rep is our easy proof that the protocol is current and linked to the institution #.
 - Attach IRB or IACUC approvals letter if not yet linked and appearing on the fundsummary.rep.
 - IRB linking contact: Jamie Kimbrough, Reg. Records Spec., kimbrouj@upenn.edu
 - IACUC linking contact: Ivy Evans, Admin Asst, ievans@upenn.edu
Anthony Williams, Admin Asst, anthony3@upenn.edu
 - Attach approval letter if “Exempt” citing category. IRB review is required to make determination
 - “multiple” please identify them by writing them in
 - Protocol # supplied on transmittal different from current linkages – Change in Use?
 - Protocol still “pending”...must be noted with an “Other Attachment” on eSNAPs
 - **Subcontracts (NIH is Prime Sponsor)**
 - Treat like NIH is the sponsor http://www.med.upenn.edu/orss/docs/subcontract_cheat_sheet.doc
 - But the Sponsor only wants the subcontract modification.....
 - It is our duty to at a minimum supply a face page (protocols, assurances, etc.)and all effort over 1 CM on “All Personnel” Report
 - **SOMERA generated Face Pages**
 - Selecting SNAP = “N” on the Project/Sponsor tab will always generate the Costs Requested Totals
 - No ability to generate Face page...contact ORSS and we’ll update sponsor settings.
 - **K award special instructions**
 - PHS 2590 Section 5 - Additional Instructions for Preparing Continuation Career Development Award (CDA) Progress Reports (Additional Sections G-J including the Mentor’s Report)
 - **T award special instructions**
 - Include Summary of Trainees Tables 12A(Predoc) and/or 12B(Postdoc)
 - Trainee Diversity Table
 - **ARRA → Non ARRA** ORS will create new Inst # in PT due to change in CFDA #.
 - **Copies**
 - eSNAP- 1 copy of transmittal and signed subcontracts (we hold back ORS copy until received)
 - otherwise original and 2 copies still needed
 - **NIH inquiries to progress reports**
 - Responses can be routed via Rich Snyder
 - May want to consider actually providing the forecasted unobligated balance > 25K to eliminate further inquiry (PMS data is only available as of 09/30/10 due to glitch)
 - **What is the perfect progress report to review and submit?**

- **ORSS Web Did you know?**
 - DUNS # & Congressional District Locators
 - New NRSA Stipend levels posted
 - Webi Links & Preferences
 - xTrain FAQ's

- **Commons Access**
 - Account exists from another institution- only an SO can create the affiliation to Penn
 - AO's still can be creating new PI or POSTDOC Accts
 - AO's can't edit accounts created by others to add roles (examples: add PI role to POSTDOC; ASST to AO)
 - xTrain access limited to ASST role and delegated to by PI
 - Statement of Appointments and Termination Notices must be routed to BO role for submission.

- **Advance Account/ Account Continuation/Unfreeze Requests/Post Award**
 - Marilyn Becker handles all advance account creations for noncompeting continuations requiring a new fund # when the progress report is submitted.
 - Hard copy requests still go to your ORSS Specialist
 - Mike Johnston mjohnst@exchange.upenn.edu handles Clinical Trial Adv Acct requests or extensions
 - Late Progress Reports (ORSS-ORS agreement is to wait until request is received in PennERA and request status is updated to "future pending")
 - Award is received and no fund....contact ORS pre-award to set up the Award (Don't seek Advance Account)
 - Same logic applies to Account Continuations where sponsor agrees to extend.
 - Marilyn Becker handles all grant unfreeze, remapping requests, and CT residual balance requests.
 - ORSS Monthly emails of accts freezing, quarterly emails about active overdrafts
 - ORSS updates NIH advance accounts to "Awarded" when NOGA comes in.

- **PD Proposals**
 - **Generic Sponsor form**
 - Use Other Costs for Total Directs if you've uploaded a detailed budget elsewhere.
 - Include sponsor guidelines or a link to or an RFA#
 - Upload docs to "Supporting Docs" not "Internal Docs" (exceptions Adobe forms; signature pages)
 - **All Submissions**
 - Remember to insert participating faculty's BA in routing path – Information only
 - Research plan must be "Final" prior to final inst'l approval
 - Cost Sharing should also show in Inst'l Budget (not just a cost share form)

- **Introduction to ORSS Receivables Analyst Danielle Dilanni** ddianni@mail.med.upenn.edu

- **Introduction of any new staff in attendance**

FIGURE 1: Opening InfoView screen.

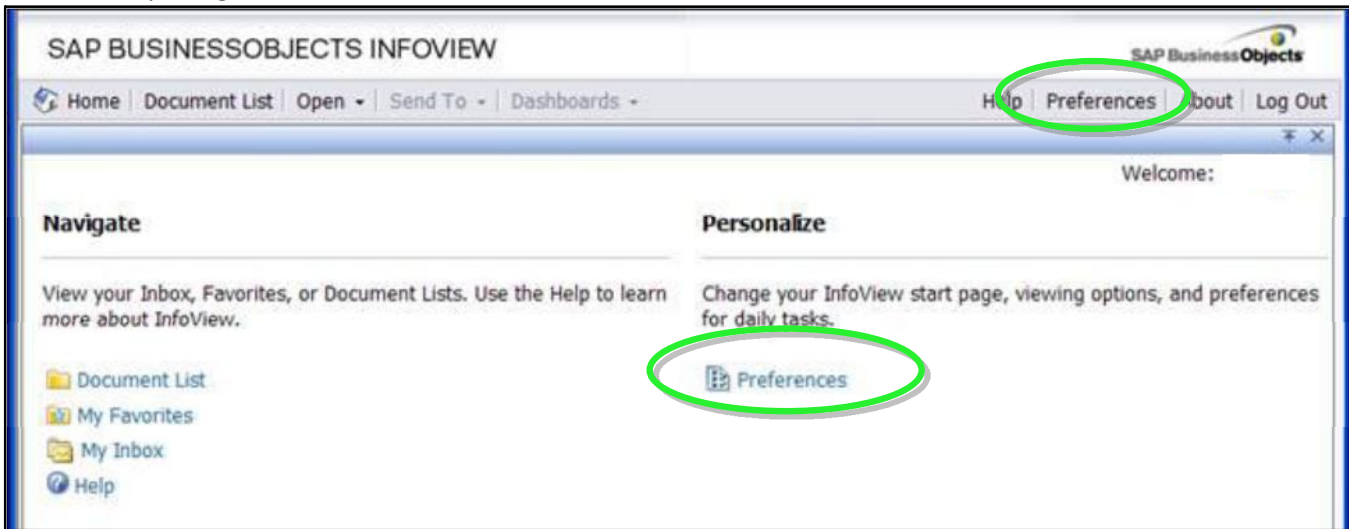


FIGURE 2: Preferences with [General] expanded.

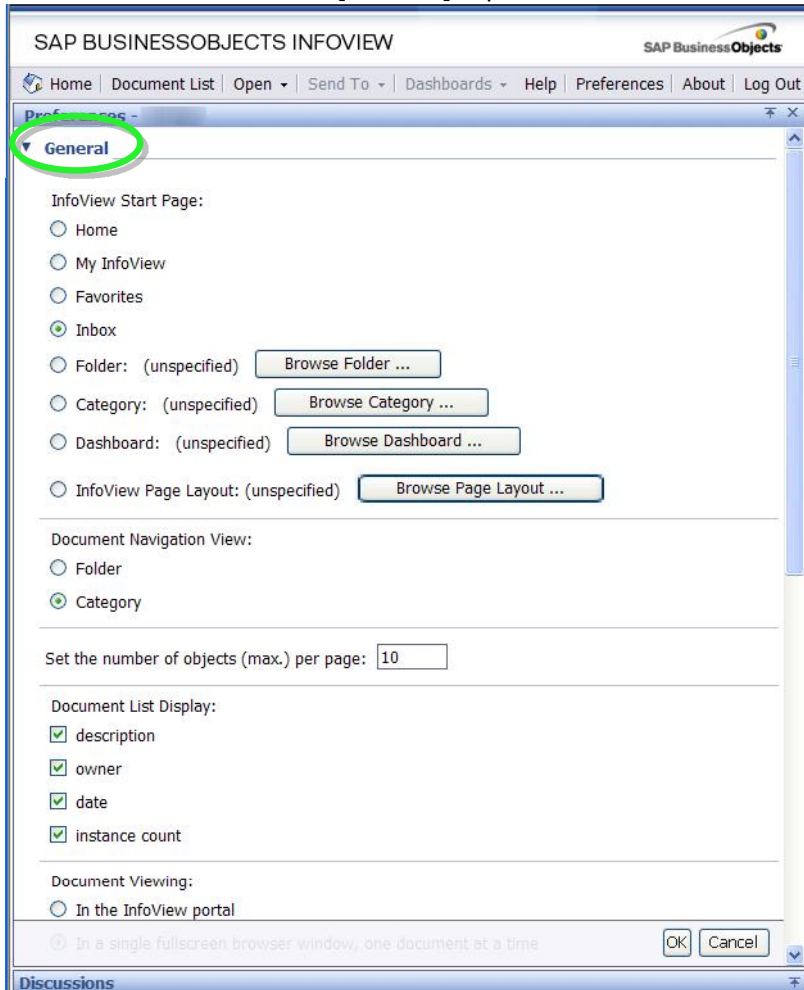


FIGURE 3: Note page controller in upper right of the screen which tells you how many pages of reports there are (no matter what your preferences for number of objects per page is set to).

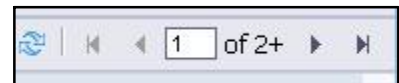


FIGURE 1: InfoView opening screen with **Inbox** set as Start Page.

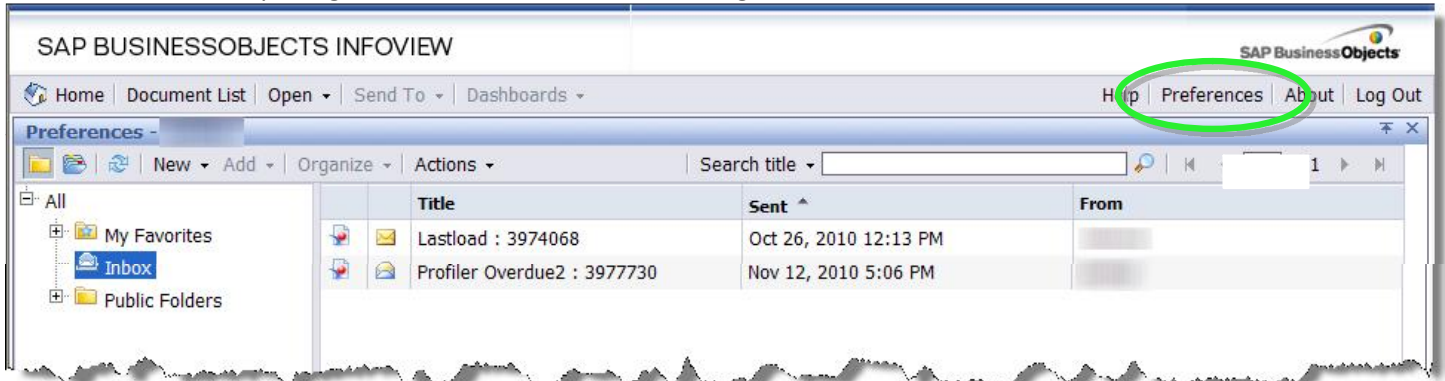
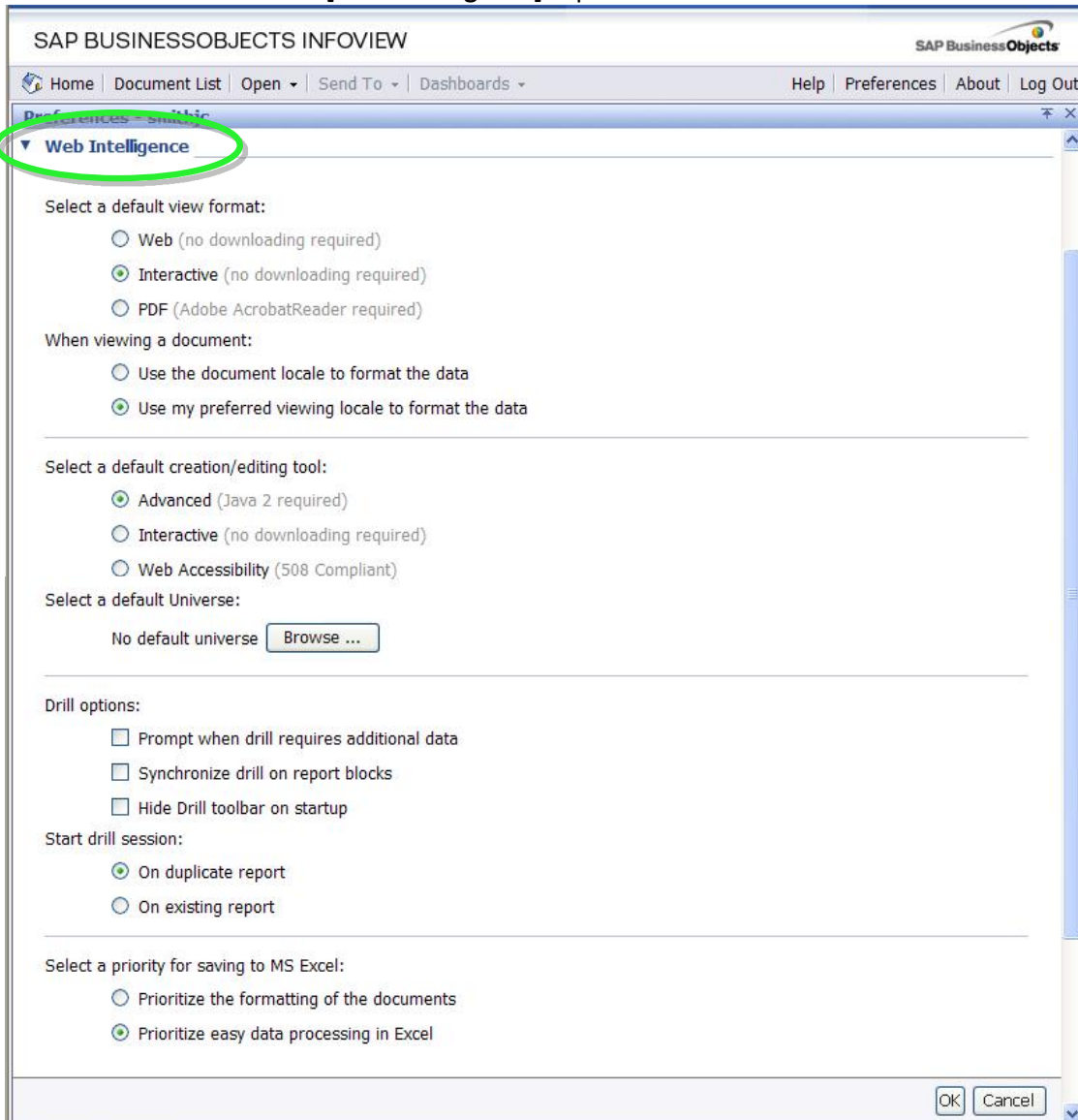
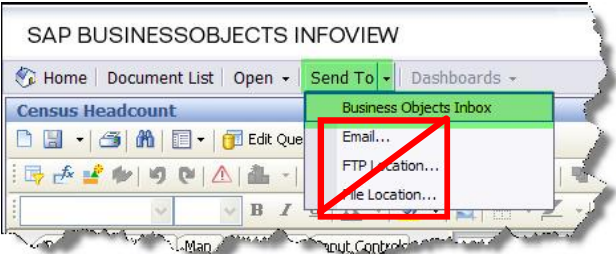


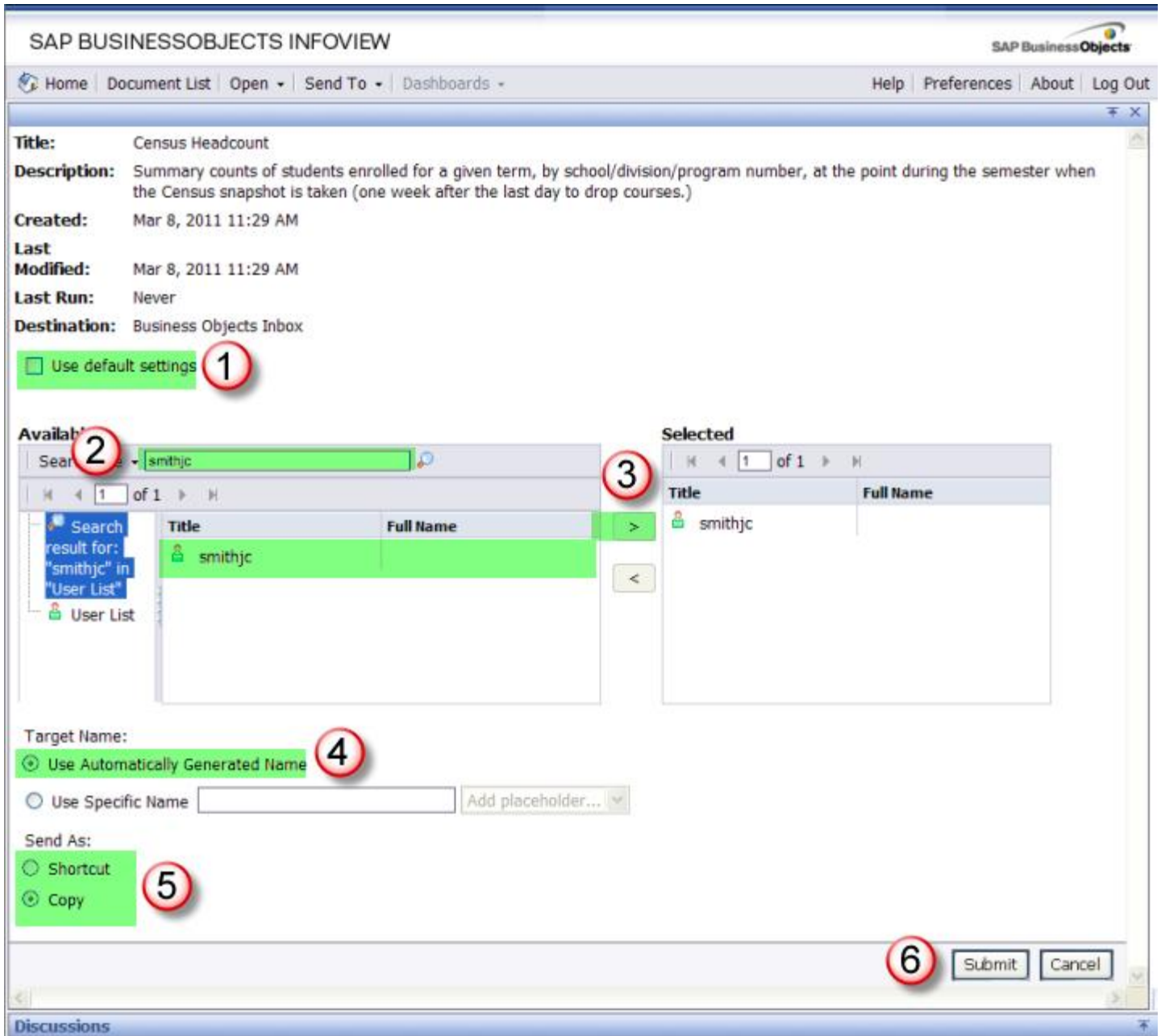
FIGURE 2: Preferences with **[Web Intelligence]** expanded.



Step-by-Step Instructions:	HINTS
<p>Highlight report title (an alternative is to start with an open report)</p>	<ul style="list-style-type: none"> You CANNOT share report copies unless the reports first reside in your Favorites Folder. Corporate reports must first be saved there and then shared. (see 'How to Copy a Repository/Corporate Report for Editing' for details). You cannot share shortcuts at all. Best practice – <i>purge data unless the other user is authorized to see the same information and they need to see it with the data you see.</i>
<p>Click Send To and select Business Objects Inbox</p> 	<ul style="list-style-type: none"> This process is the same whether you are in InfoView or Webi and whether you are on the 'Edit Query' screen or the 'Edit Report' screen of Webi or simply viewing the report (open or just the title) through InfoView. The Email, FTP location, and File location options are all disabled. You can only share through the application through the Business Objects Inbox. Check your Inboxes often as you will NOT get any notification of a new file coming into the Inbox. You can set Inbox as an opening location preference for InfoView.
<p>Uncheck Use default settings box (#1)</p>	<p>Default settings send it to yourself.</p>
<p>Type in the PennKey of the person receiving the report and click the Search icon (#2)</p>	<ul style="list-style-type: none"> If you make a typo and hit Search and then change the search criteria, and search again, it assumes you are "refining" your original search. This often results in NO results. Best practice in this case is to click Cancel and start over.
<p>Highlight the correct person and click the right pointing arrow (#3)</p>	
<p>Select Use Automatically Generated Name (#4)</p>	<p>This is the default for Target Name.</p>
<p>Select Copy under Send As: (#5)</p>	<p>Only want to pick copy if it's in one's favorites.</p>
<p>Click Submit (#6)</p>	<p>Report will be sent – there is no confirmation message. Tip – let other user know report has been sent</p>
<p>Note: See FIGURE 2 for what the sent reports look like in the recipient's Inbox.</p> <ul style="list-style-type: none"> Yellow highlighting shows copy of report sent with the automatically generated name. Green highlighting shows the shortcut for the report with the Target Name as DateTime, but this is ONLY a shortcut to something in YOUR OWN FAVORITES FOLDER. 	

How to Share a Copy of a Report

FIGURE 1. The screen for sending a **copy** of a report to someone else. **NOTE:** You can only send copies of reports saved in your own Favorites Folder!!





	Title	Sent ^	From
	Census Headcount : 4009010	Mar 9, 2011 2:16 PM	smithjc
	2011-03-09-14-17-21	Mar 9, 2011 2:17 PM	smithjc

FIGURE 2: The recipient's **Inbox**. You can only send shortcuts to yourself of reports in your own **Favorites Folders**.