Penn Medicine

PI Fund Reporting tool – BA View

TOUR AND NAVIGATION TIPS

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PSOM PI Fund Reporting

Purpose

Dashboard that shows the status of a PI's research portfolio.

Replaces the manual, error-prone process in which each department manually generates individual reports out of Business Objects and distributes to PIs.

Audience

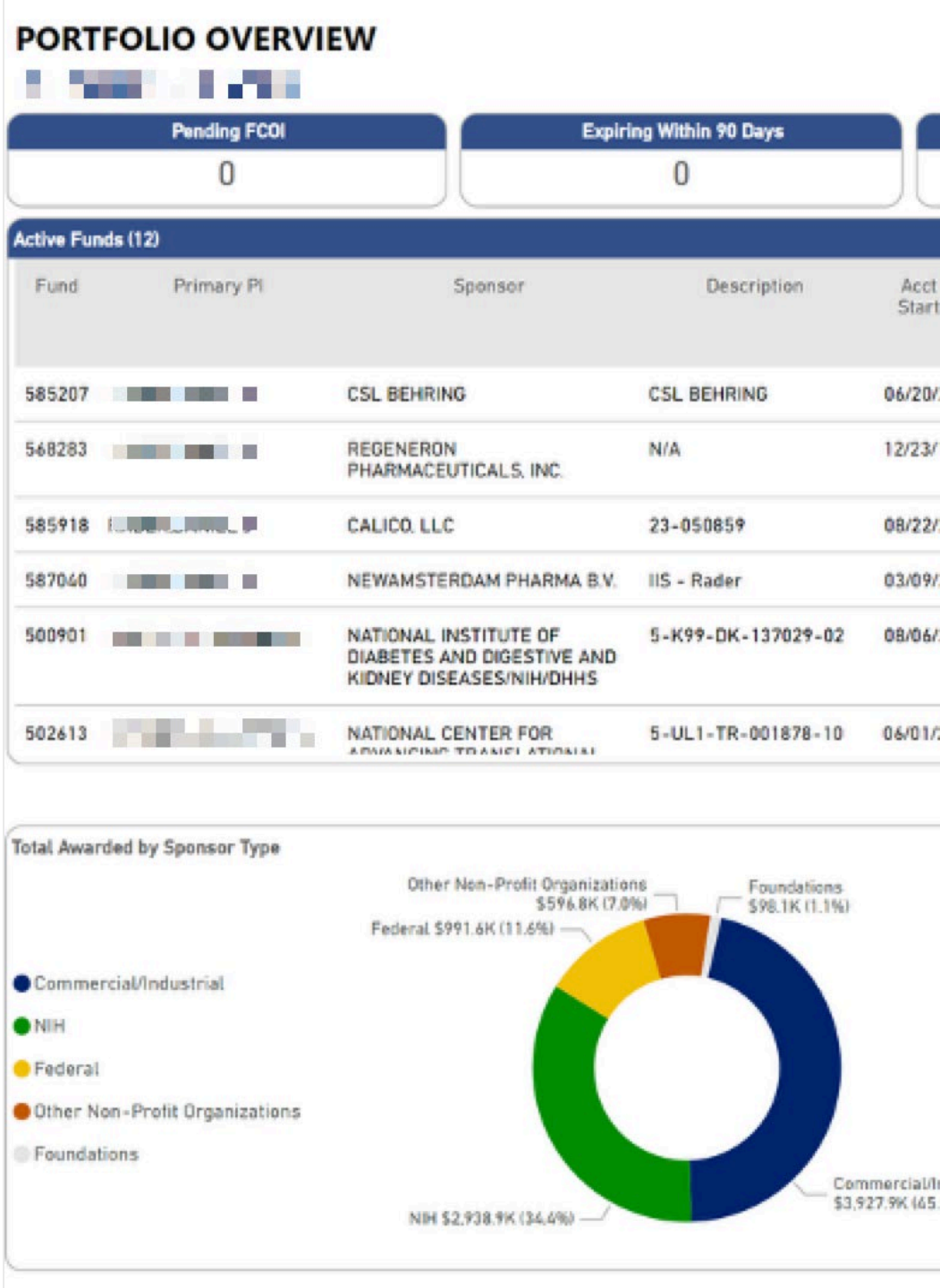
- Principal Investigators
- Departmental Leadership and Administrators

Content

PI View:

- Funds overview
- Individual fund summary and detailed transaction data
- Personnel summary
- Proposals Pending
- **In the future, faculty sign off for compliance purposes**

BA View - Metrics and Flags



Login and Access – BA View

Administrator access to BA View

- To access the BA View of the dashboard, you must be given access for a department or org
- ~ 400 administrators and leaders have been given access
- Contact Lynn Meaney regarding access (meaney@upenn.edu)
- **Whose grants will you see?** List of PIs based on access to PI Home org or Resp Org of individual grants
- Metrics and Flags on BA View
  - Resp org based – if you have access to the resp org that is responsible for the grant, then you will see the grant and flags

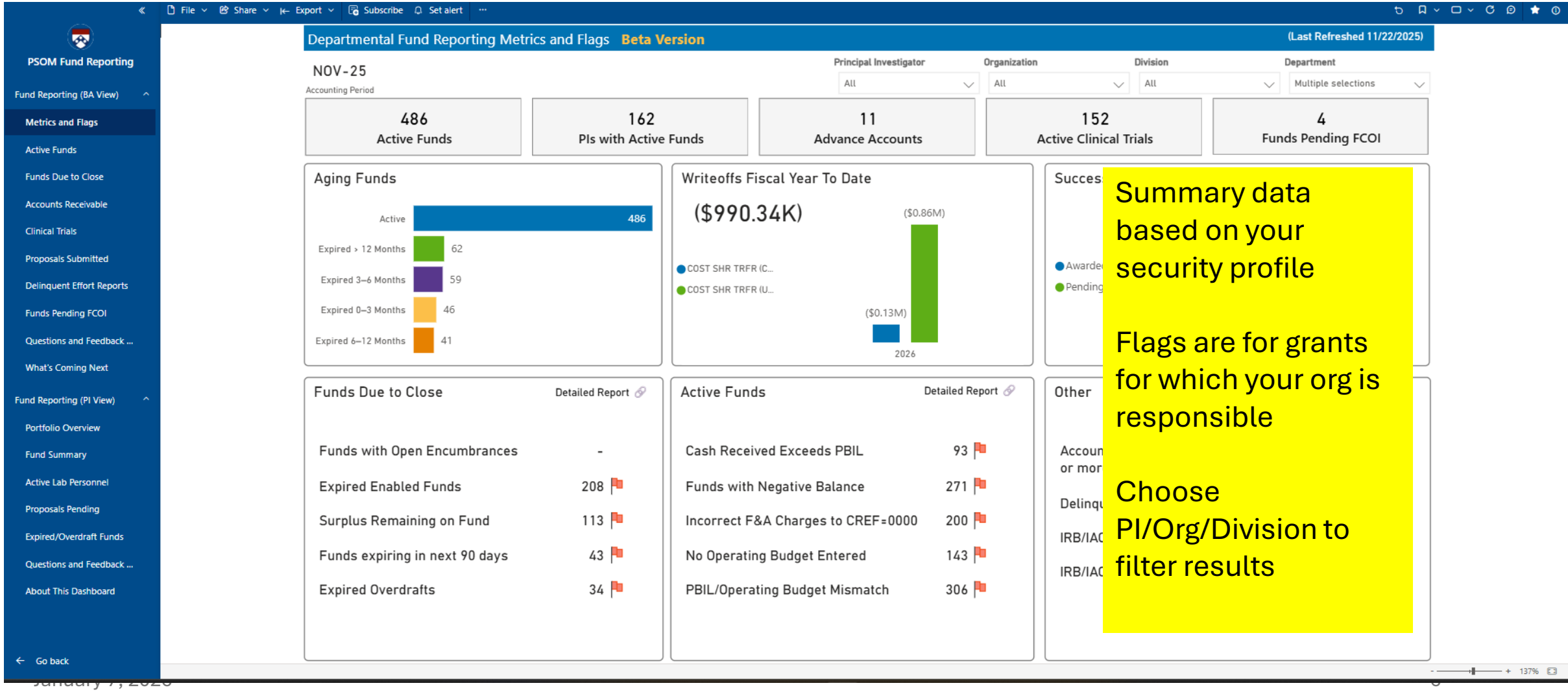
Login for BA View

Go to PI funding reporting link and click on the link for the PI Reporting tool (Tip: Bookmark the dashboard after logging in)

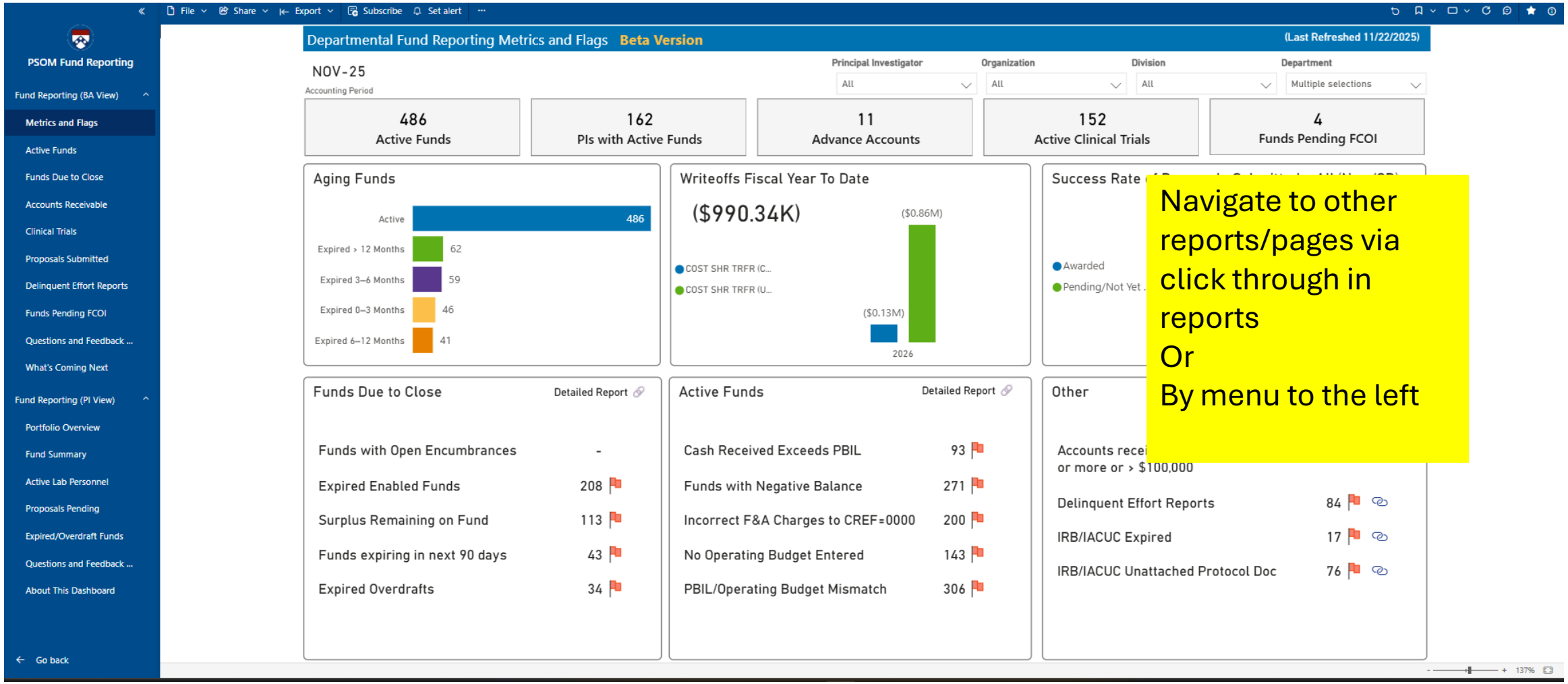
- *Login using your UPHS login id and Password (Tip: Save login id and password when prompted)*
- *To reset your password, call 215-662-7474*
- *If you encounter any problems logging into your Penn Medicine account (after resetting your password), Submit a service ticket @ UPHS IT self service: (https://uphsnet.uphs.upenn.edu/athenaselfservice/).*

  and add Jassem,Rawa and Meaney,Lynn as 'Watchers'

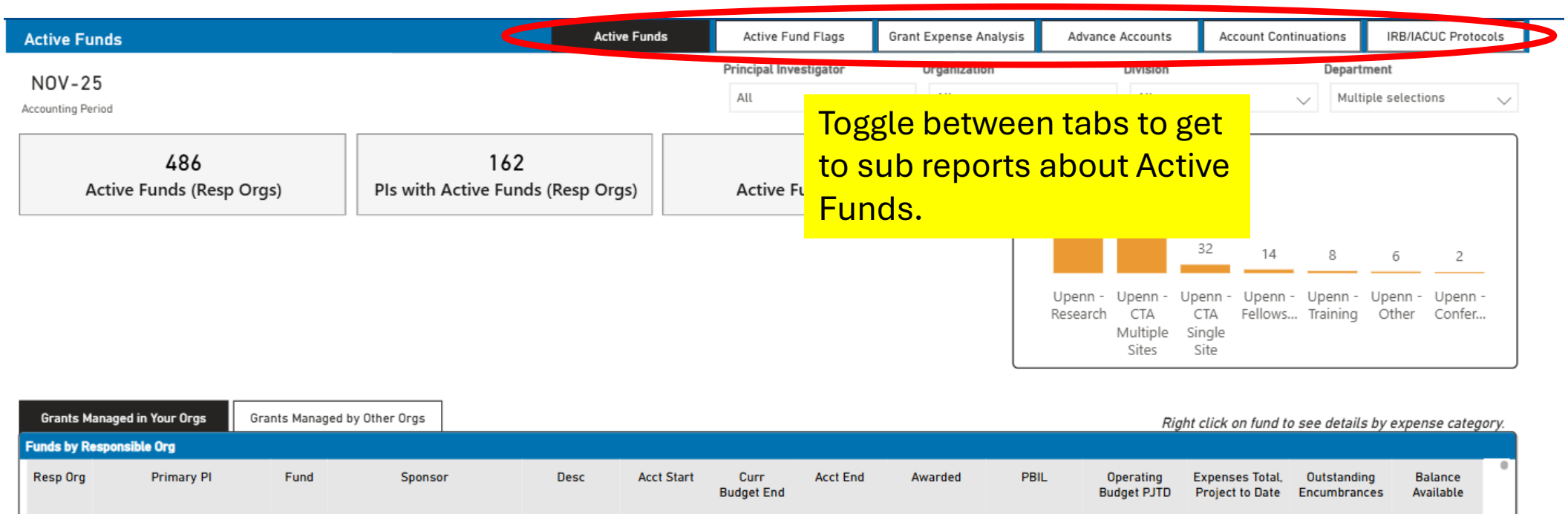
Metrics and Flags – *default landing page for Department leadership/administrators*



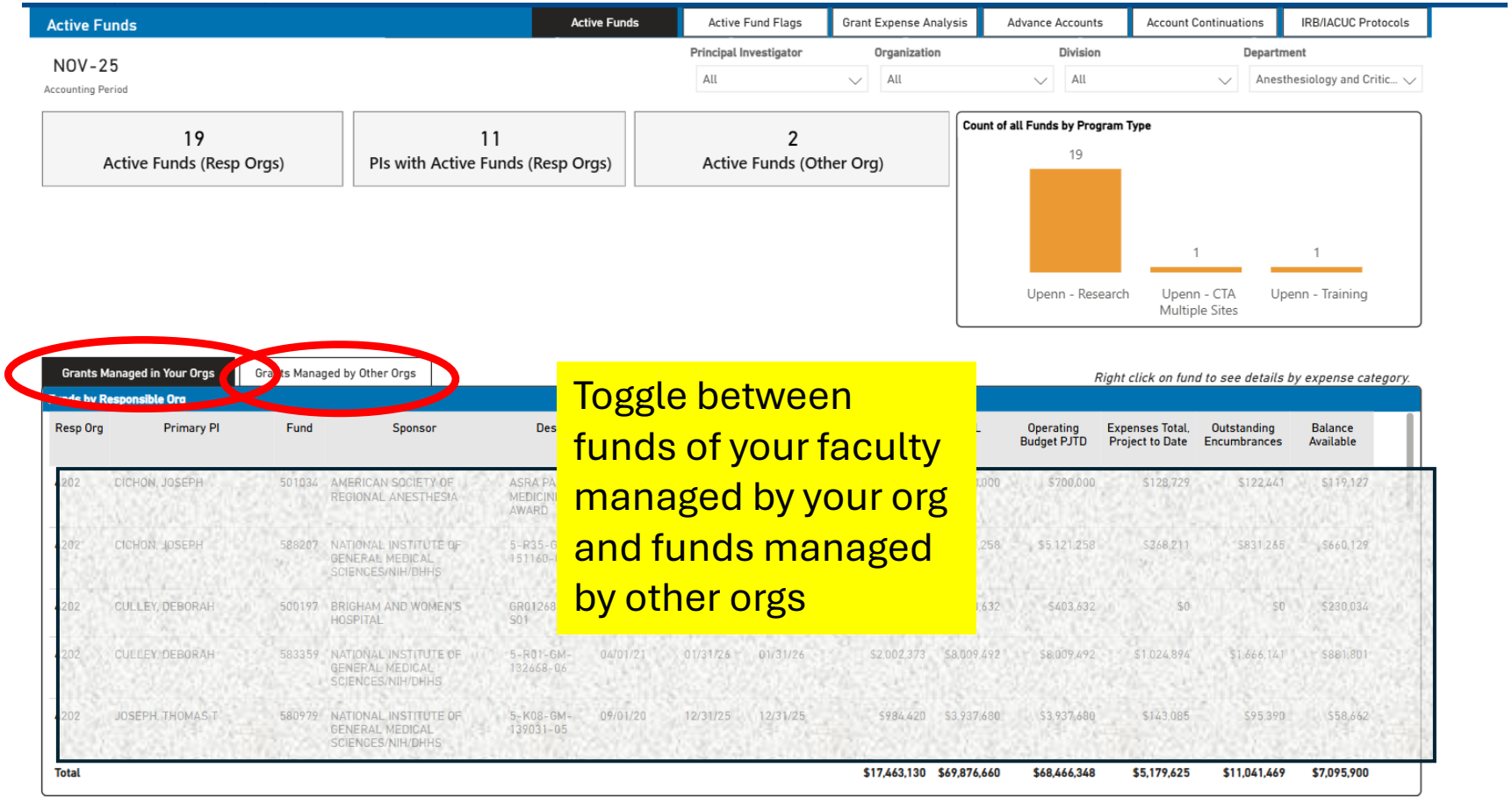
Metrics and Flags



Active funds

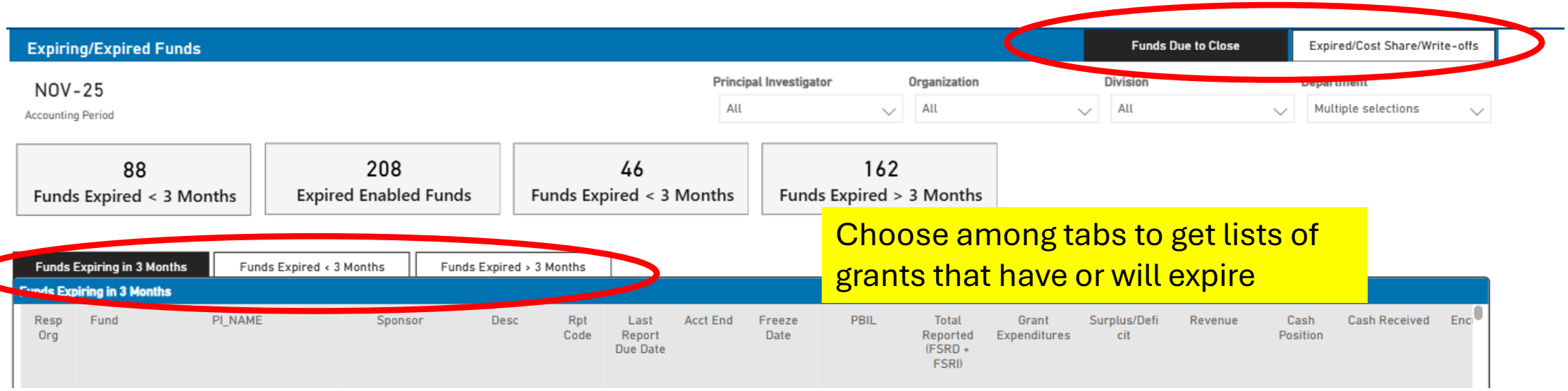


Active funds



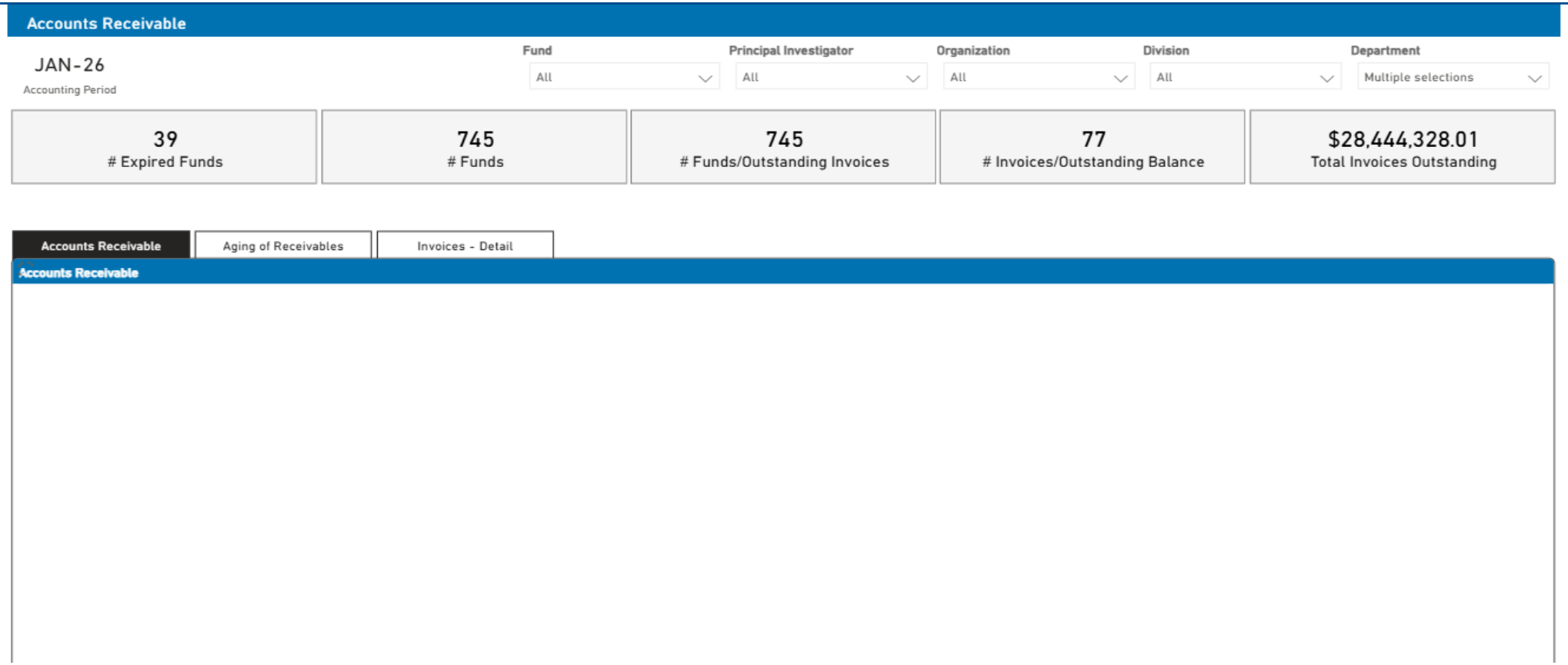
Toggle between funds of your faculty managed by your org and funds managed by other orgs

Funds due to close

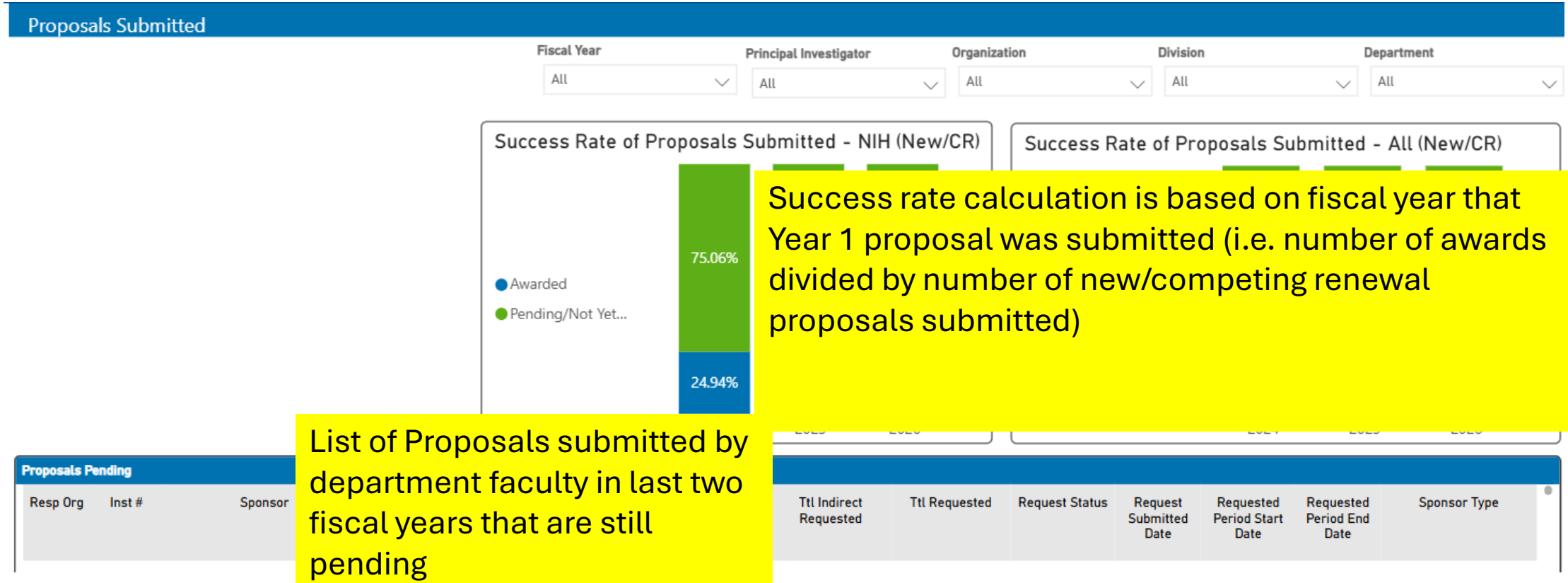


Accounts Receivable

Reports of all current Accounts Receivable (billing)



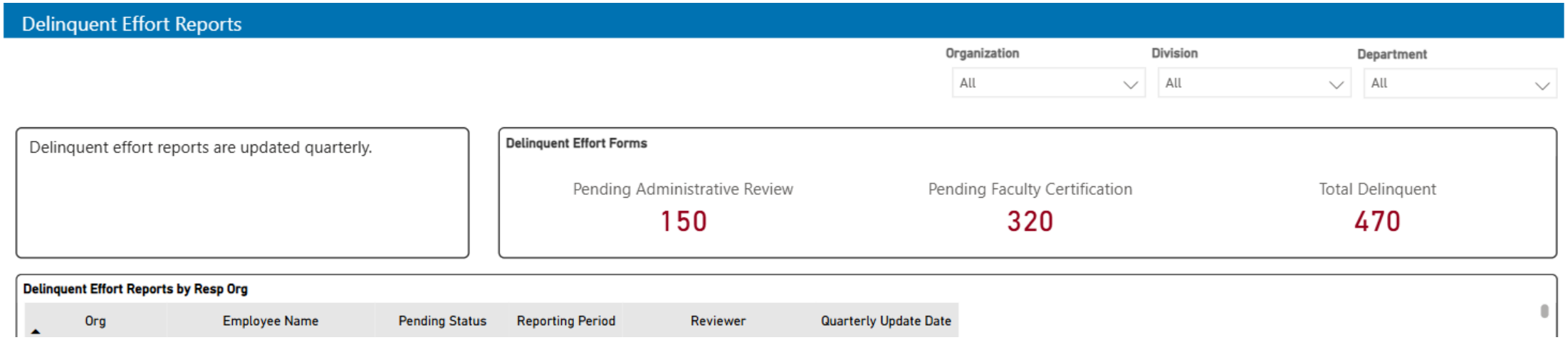
Proposals Submitted



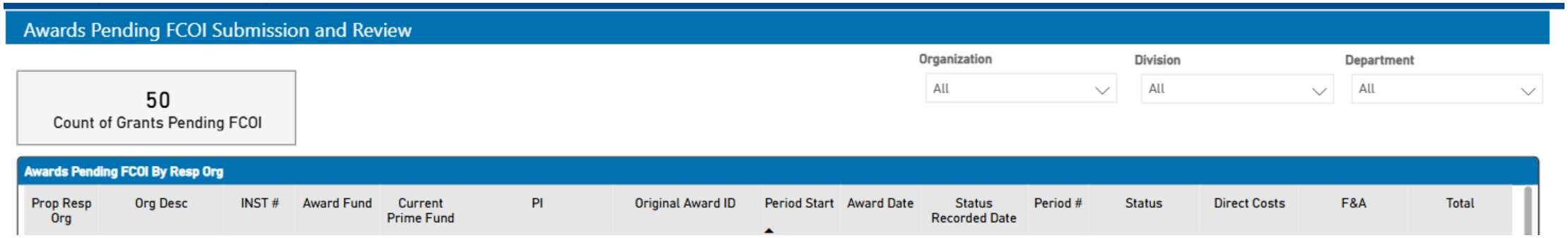
Success rate calculation is based on fiscal year that Year 1 proposal was submitted (i.e. number of awards divided by number of new/competing renewal proposals submitted)

List of Proposals submitted by department faculty in last two fiscal years that are still pending

Delinquent effort reports

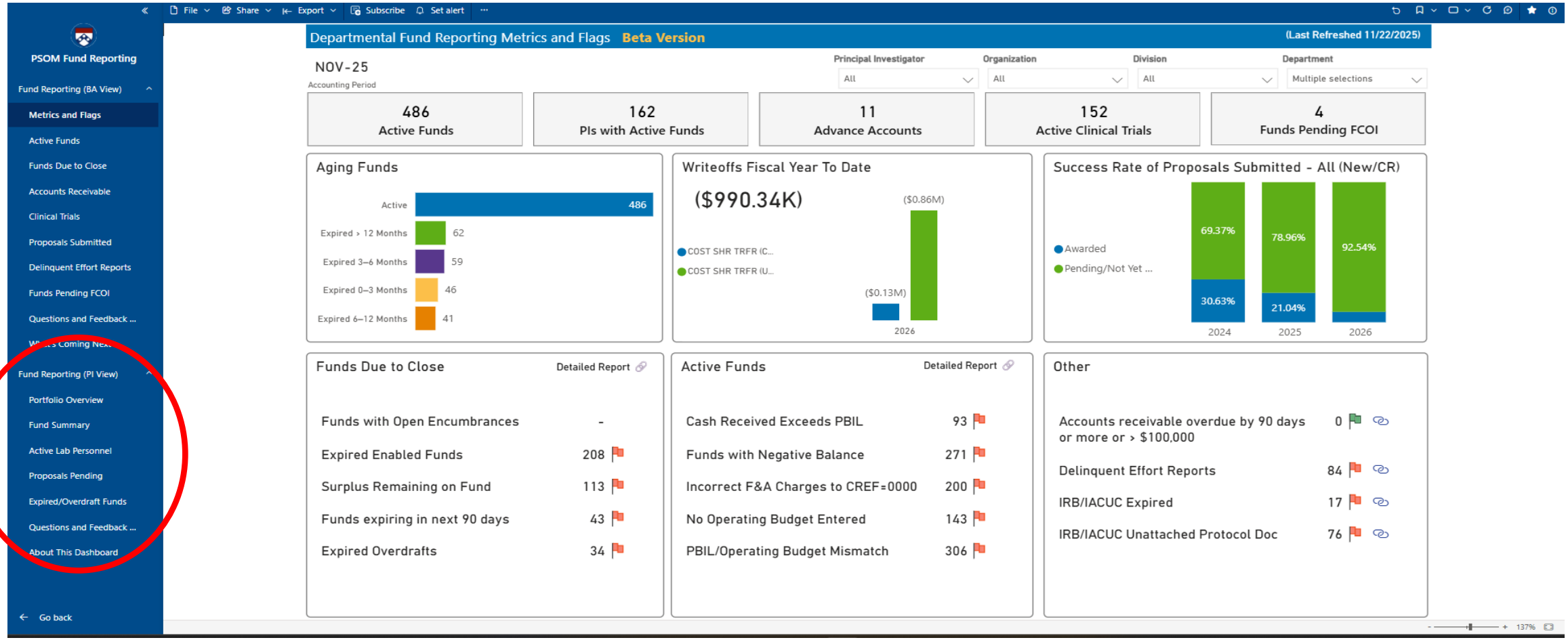
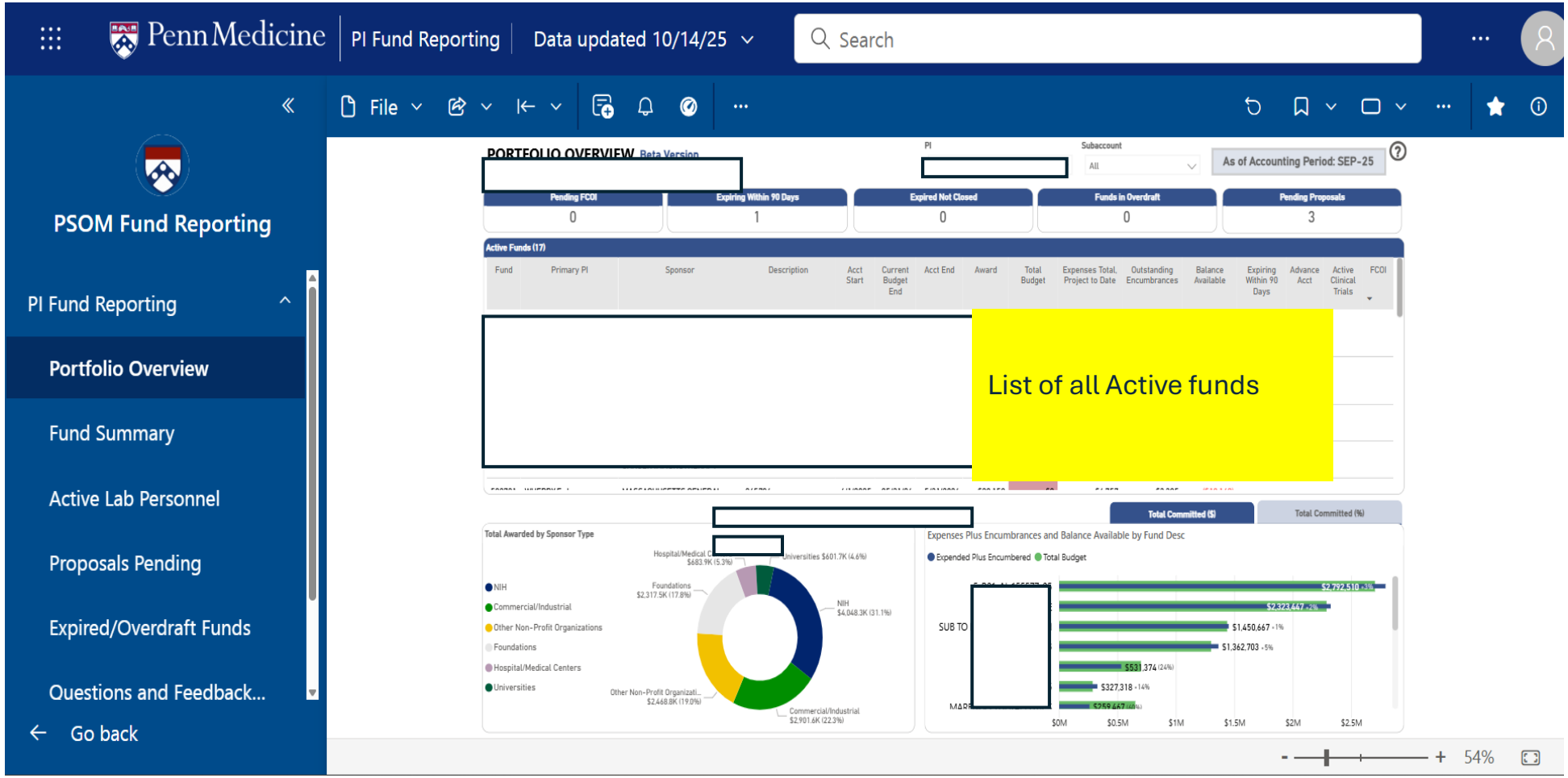


Grants pending FCOI



Grants in Pending FCOI status cannot be active funds until submission of FCOI by PI

Choose PI View from Menu to see more detail about a specific faculty member's grant portfolio and other information.



Portfolio Overview –
default landing page for faculty