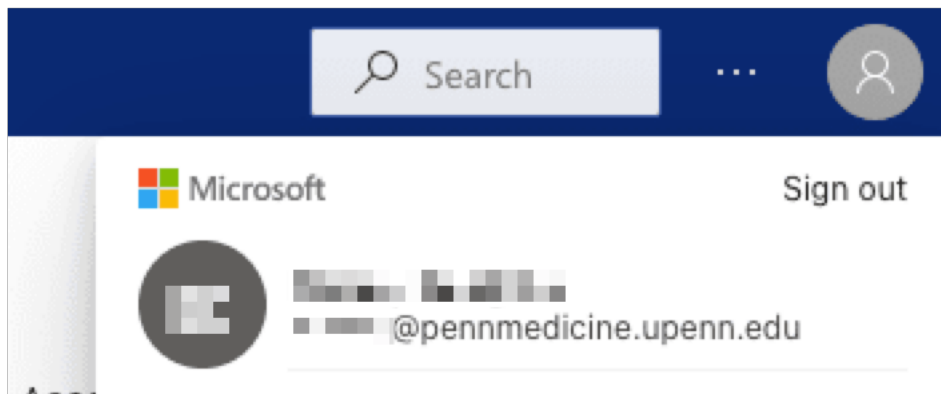


GETTING STARTED: PSOM RESEARCH/FINANCE METRICS

LOGIN

1. [Click here](#) for direct link to dashboard
2. You must be logged in with your PennMedicine account as shown below. If you don't gain access the first time you try, please confirm that on the drop-down in the upper left-hand corner you are logged in with your `username@pennmedicine.upenn.edu` account. If you are not, click "Sign out", close the browser tab and start the login process again.



SELECTING A DEPARTMENT OR DIVISION



Use the control icon to select from the hierarchy where you would like to focus your attention. See the following page for how to create bookmarks to parts of the hierarchy you are interested in viewing regularly.

GETTING HELP AND DETAILS



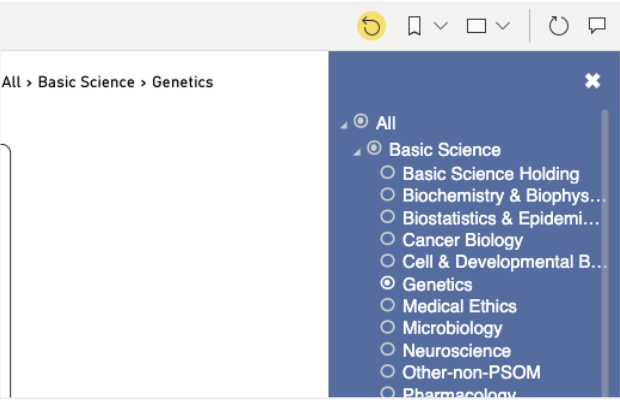
Use the information icon to get detailed descriptions, business logic, and references to detailed reports. Many information pages also include detailed listings.



Use the question icon to navigate to additional online resources including contact information to get further assistance.

CONFIGURING PERSONAL BOOKMARKS IN THE DASHBOARD

You can set up a default department/division view and additional custom views using the attached instructions.

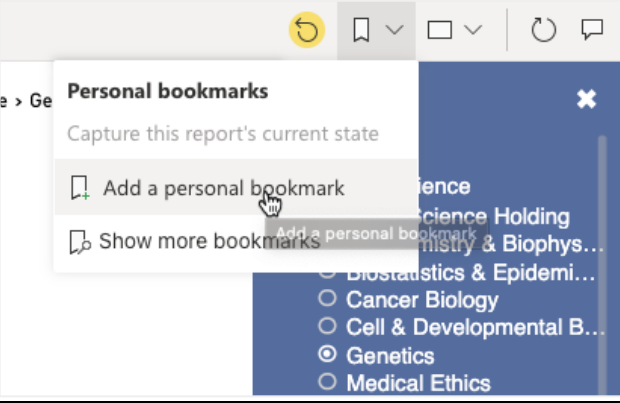


The screenshot shows a breadcrumb trail 'All > Basic Science > Genetics' and a dropdown menu with a list of departments. 'Genetics' is selected with a radio button.

1

Select a department or division you wish to preset as a bookmark.

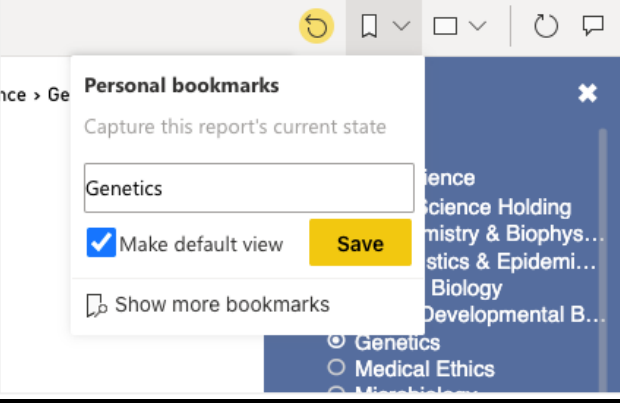
If necessary you can open the organization hierarchy using the button on the top right of the dashboard.



The screenshot shows the 'Personal bookmarks' menu open, with 'Add a personal bookmark' highlighted by a mouse cursor.

2

Select the Personal bookmarks menu above organization hierarchy and “Add a personal bookmark”



The screenshot shows the 'Personal bookmarks' form with 'Genetics' entered in the name field, 'Make default view' checked, and the 'Save' button highlighted.

3

Name the bookmark and select “Make default view” if you want this view to be your default when you open the COO Dashboard.

Add other bookmarks to set additional defaults if you wish.