

Post Award Advisory Committee

Reporting
June 19, 2013

General Overview

- Our standardized post award process will utilize M-Reports
- Our group is currently
 - Piloting and developing best practices that will be distributed during training
 - Developing standard reporting language and training tools for faculty
 - Developing a tool kit for ad hoc reports

Advantages

- Group looked at ways to enhance the current platform
 - Reviewed reporting methodologies used by several departments
 - Identified areas that would improve functionality for faculty and staff
- ITS implemented our suggestions

Recent Enhancement #1, 2, 3

1. Can assign “nicknames” to projects
2. Primary investigators can now assign secondary or proxy access to a project/grant.
<http://www.bi.umich.edu/products/download/GrantSecAccess.pdf>
3. The shortcode for a Project/Grant has been added to the Project/Grant Budget Status Reports and the Project/Grant Information reports.

Recent Enhancement #4

A new % Expended column on the Summary of Project/Grants Report and the Project/Grant Budget Status Report (PBSR) that shows the percentage of expended funds that have been spent in comparison to the amount budgeted.

Recent Enhancement #5

A new % Effort report, available from the Project/Grant Budget Status Report (PBSR) as well as the Summary of Project/Grants Report, shows the current level of effort for each employee assigned to a project/grant.

Enhancements to be Released by 7/2/13

M-Report Enhancements:

- Auto-expand columns on Summary of Projects and PBSR for non-faculty users
- Add IDC calculations for Open Req/PO Encumbrance Amounts and for Expended Since Last Month Closed columns
- Add link from M-Report to Manage UDC page in MPathways

Next Steps

- Start exploring the functionality of M-Reports
 - Use instructions http://www.bi.umich.edu/products/project_grant_reports.html
- Ensure that all P/G have the correct SAPOC listed
 - Business Objects/Public Folders/User Shared/Med School PAAC- list of SAPOC's by Dept ID
 - Submit 1 spreadsheet with changes for your department to your main customer service rep (include Sponsored Programs coordinator name, P/G Number, and name of new SAPOC)
- Ensure that all necessary individuals have access
 - http://www.bi.umich.edu/products/project_grant_reports.html#AccessDetails



Questions

- Please ask any questions

