Proposal & Award Metrics Dashboard

About this Dashboard

Proposal & Award Metrics Dashboard (PAMDash) provides self-service access to proposal and award data metrics. It was created in response to the growing need for departments to monitor extramural funding metrics. The Office of Sponsored Research (OSR) and the Controller's Office collaborated to develop the dashboard, now managed by Project and Data Team under Contracts and Grants Accounting (CGA).

For assistance, contact the Contract & Grants Accounting Service Desk at CGAServiceDesk@ucsf.edu

Data Sources and Update Frequency
Data on submitted proposals are from the Proposal Express module in the PeopleSoft Research Administration System (RAS) and CACTAS. These data are managed by OSR. Data on awards are from the PeopleSoft Research Administration System (RAS). When applicable, data on awarded amounts and funding mechanisms are sourced from the RAS Awards module. These data are managed by the Controller's Office, Contracts & Grants Accounting.

All data are refreshed daily, as indicated by the date/time stamp at the bottom of each dashboard page.

In cases where the value of a common data element differs between Proposal Express and the Award module, the value stored in the Award module has been selected for reporting. See Data Definitions below for additional details.

Reporting Years
Data are aggregated in all metrics by fiscal year, beginning with proposals submitted in 2014. Optional views by calendar year and federal fiscal year are available, which aggregates data beginning with proposals submitted in FY2013-14.

The starting dates differ between calendar year and fiscal year views in order to begin all metrics with a full year of data. The start date for the calendar year view is January 1st and for the fiscal year view is July 1st. For federal fiscal year the start date is October 1st.

For information on award revenue by award budget period, consult additional reporting available from the Office of Sponsored Research, or the Controller's Office Contracts & Grants Accounting.

General Use Notes

Common Filters. Filters are provided to limit data in all graphs to a specific subset of data. Setting a filter will recalculate all graphs across all tabs of the dashboard.

Page Filters: These filters will update all charts only on this specific page simultaneously.

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The following data elements have been used to construct the metrics.

Data Element	Definition	Inclusion Criteria	Source of Data
Actual Expense	Actual costs incurred during the sponsored research project.	Includes accounting periods from 0 – 12.	General Ledger
Actual Revenue	The total amount of income generated by sponsored research activity in normal accounting format.	Includes Accounting periods from 0 - 12	General Ledger
Agreement Type	OSR-identified categories for sponsored agreements can be found at: http://osr.ucsf.edu/sponsored-agreements		RAS Awards module
Award Begin Date	Beginning of the award period		RAS Awards module
Awarded Date	System date that the proposal was interfaced into an award. This cannot be edited.		RAS Awards module
Award End Date	End of the award project period		RAS Awards module
Award ID	The system-generated number assigned to awards and recorded in the RAS Awards module		RAS Awards module
Award Purpose	OSR-identified categories for award purposes can be found at: http://osr.ucsf.edu/sponsored-agreements		RAS Awards module
Award Reference Number	Additional name that a sponsor might use to identify an award/project.		RAS Awards module
Award Status	The status of the Project (Accepted, Closed, Advance)	The dashboard does not include canceled awards	RAS Awards module
Awarded Amount	Original total costs are designated at the time an award is granted. Available only for proposals in awarded status that have a corresponding award record created in RAS.	Excludes Advance and Extension action types.	RAS Awards module

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Data Element	Definition	Inclusion Criteria	Source of Data
Control Point	Control Point Department		RAS Awards module
Date Created	Date when a proposal was created.		Proposal Express
Department	Department of the award/project.		RAS Awards module
Dept/Ctr/ORU	Dept/Ctr/ORU level departments.		RAS Awards module
Direct Cost Funding	Funded amount for direct costs, which represent incurred costs that can be identified specifically with a particular sponsored project, an instructional activity, or any other institutional activity, or that can be directly assigned to such activities.	This data excludes Future Year, Advance and Extension.	RAS Awards module
Division	Division-level departments.		RAS Awards module
Expense Budget Balance	The remaining expense budget left on an award.	Normalized Expense Budget – Actual Expense	General Ledger
Federal Identification Number (FAIN)	The unique identifying number assigned to all federal finance awards.		RAS Awards module
Fund Code	Code identifying the fund associated with the project.		RAS Awards module
Funded Amount/Award Funding Amount	The sum of total funding dollars on the award modifications page.	This data excludes Future Year, Advance and Extension.	RAS Awards module
Funding Entries/Funding Entries Count	Award modifications count.	This data excludes Future Year, Advance and Extension.	RAS Awards module
Funding Source (Fund Category)	The funding source is based on the fund code.		RAS Awards module
Funding Source (Sponsor Category)	The funding source is based on the sponsor category.		RAS Awards module
Indirect Cost Funding	Funded amounts for indirect costs, which represent costs incurred by a grantee for common or joint objectives and cannot be identified specifically with a particular project or program.	This data excludes Future Year, Advance and Extension.	RAS Awards module

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Data Element	Definition	Inclusion Criteria	Source of Data
Normalized Expense Budget	The limit that is available for a sponsored project to spend. Typically, by accounting standards, budgets are seen as a negative number, here we see it as a positive number due to the normalization.		General Ledger
Normalized Net Position Change	The balance is calculated using the Revenue - Expenses + Other changes. Normalization makes revenue positive.		General Ledger
Normalized Net Position Ending Balance	The ending balance is calculated using the Net Position Beginning Balance + Revenue - Expenses + Other changes. Normalization makes revenue positive.		General Ledger
Normalized Revenue	The total amount of income generated by sponsored research activity. Typically, by accounting standards, Revenue is seen as a negative number, here we see it as a positive number due to the normalization		General Ledger
PI UCSF ID	The UCSF employee ID # for the primary/contact principal investigator associated with the proposal or award.		RAS Awards module
PI Name	The primary/contact principal investigator associated with the proposal or award.		RAS Awards module
Prime Sponsor Group	The prime sponsor category is related to the proposal or award.		RAS Awards module
Prime Sponsor ID	The prime sponsor's UCSF ID # associated with the proposal or award UCSF employee ID #.		RAS Awards module
Prime Sponsor Name	The prime sponsor's name is associated with the proposal or award.		RAS Awards module
Proposal Amount	Total costs are recorded on the proposal at the time of submission.		Proposal Express

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Data Element	Definition	Inclusion Criteria	Source of Data
Proposal End Date (To Date)	End of the project period		Proposal Express
Proposal Begin Date (From Date)	Begin date of the project period		Proposal Express
Proposal ID	The system-generated number is assigned to proposals and recorded in Proposal Express.		Proposal Express
Proposal Purpose	The purpose of the proposed project.		Proposal Express
Proposal Status	The current status of the Project: Awarded, We have received an award. Not Funded, either received a communication from the Sponsor stating that the proposal will not be funded OR it has been a year since the proposal has been submitted. In Progress The Proposal has been submitted to the sponsor and we are waiting for a response		Proposal Express
Proposal Title	Title of the submitted proposal as recorded in Proposal Express		Proposal Express
Proposal Volume	Count of all submitted proposals recorded in Proposal Express		Proposal Express
Proposed Direct Budget	Breakout of proposal amount budgeted for direct costs, which represents planned costs identified specifically with a particular sponsored project, an instructional activity, or any other institutional activity, or that can be directly assigned to such activities relatively easily with a high degree of accuracy		Proposal Express
Proposed Indirect Budget	Breakout of proposal amount budgeted for indirect costs, which represent that are planned costs to be incurred by a grantee for common or joint objectives and cannot be identified specifically with a particular project or program		Proposal Express
RSA EID	The UCSF employee ID # for the primary RSA associated with the proposal or award.	If the proposal has been awarded, then this is the primary project RSA. If the proposal was not awarded, then this is the primary RSA on the proposal.	RAS Awards module and Proposal Express

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RSA EID	The UCSF employee name for the primary RSA associated with the proposal or award.	If the proposal has been awarded, then this is the primary project RSA. If the proposal was not awarded, then this is the primary RSA on the proposal.	RAS Awards module and Proposal Express
Sponsor Group	The sponsor category is related to the proposal or award.		RAS Awards module
Sponsor ID	The sponsor's UCSF ID # associated with the proposal or award UCSF employee ID #.		RAS Awards module
Sponsor Name	The sponsor's name associated with the proposal or award		RAS Awards module
Sub-Division	The sub-division department level.		RAS Awards module
Submission Date	When a proposal was submitted.		Proposal Express
Total Funding	Original total costs are designated at the time an award is granted. Available only for proposals in awarded status that have a corresponding award record created in RAS.	Excludes Advance and Extension action types.	RAS Awards module