Current Support Report – My Awards
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Overview

Purpose
The primary business objective of this report is to fulfill Sponsor requirements for Principal Investigators to provide a list of current awards as a condition for funding consideration.

This report would allow Investigators to answer the following business questions:

- What is my portfolio of active awards?
- What is the status of all of my active awards?

Award Records Displayed in Report
This report displays information about active award records found in the Coeus Awards module. Active awards are considered current awards for sponsor reporting purposes.

To be considered “active,” the award's overall end data will be greater than or equal to today’s present date, where the present date automatically updates on a daily basis.

Report Security
An investigator will only see award records where he or she is named as either a Principal Investigator, Co-Principal Investigator, or Co-Investigator. Therefore, all of the investigators listed on an award record will see that record in his/her version of the My Awards report.
Report Fields
This report makes use of the following fields, listed below in alphabetical order:

<table>
<thead>
<tr>
<th>Field</th>
<th>Field</th>
<th>Field</th>
<th>Field</th>
</tr>
</thead>
<tbody>
<tr>
<td>Award Anticipated Direct Cost</td>
<td>Award Investigator Home Unit</td>
<td>Award Prime Sponsor REMS Foreign Indicator</td>
<td>Award Sponsor Code</td>
</tr>
<tr>
<td>Award Anticipated Indirect Cost</td>
<td>Award Investigator Home Unit Code</td>
<td>Award Prime Sponsor REMS Sponsor Agency</td>
<td>Award Status</td>
</tr>
<tr>
<td>Award Anticipated Total Cost</td>
<td>Award Investigator VC Unit</td>
<td>Award Prime Sponsor REMS Sponsor Category</td>
<td>Award Title</td>
</tr>
<tr>
<td>Award Budget Period End Date</td>
<td>Award Lead Unit</td>
<td>Award Prime Sponsor REMS Sponsor Sub-Agency</td>
<td>Award Total Cost</td>
</tr>
<tr>
<td>Award Budget Period Start Date</td>
<td>Award Lead Unit Code</td>
<td>Award Principal Investigator Academic Year Effort</td>
<td>Award Transaction Type</td>
</tr>
<tr>
<td>Award Cost Sharing Amount</td>
<td>Award Lead Unit VC Unit</td>
<td>Award Principal Investigator Calendar Year Effort</td>
<td>Award UCSD Prime Sponsor Major Agency</td>
</tr>
<tr>
<td>Award Direct Cost</td>
<td>Award Organization Code</td>
<td>Award Principal Investigator Percent Effort</td>
<td>Award UCSD Sponsor Major Agency</td>
</tr>
<tr>
<td>Award Fund Number</td>
<td>Award Organization Name</td>
<td>Award Principal Investigator Summer Effort</td>
<td>ePD Number</td>
</tr>
<tr>
<td>Award Funding Source Name</td>
<td>Award Overall End Date</td>
<td>Award REMS Foreign Indicator</td>
<td>IP Number</td>
</tr>
<tr>
<td>Award Indirect Cost</td>
<td>Award Overall Start Date</td>
<td>Award REMS Sponsor Agency</td>
<td>Sponsor Award Number Tier 1</td>
</tr>
<tr>
<td>Award Investigator</td>
<td>Award Pending Direct Amount</td>
<td>Award REMS Sponsor Category</td>
<td>UCSD Award Number - Base</td>
</tr>
<tr>
<td>Award Investigator Count - I</td>
<td>Award Pending Indirect Amount</td>
<td>Award REMS Sponsor Sub-Agency</td>
<td>UCSD Award Number - Full</td>
</tr>
<tr>
<td>Award Investigator Count - PI</td>
<td>Award Pending Total Amount</td>
<td>Award Science Code Name</td>
<td></td>
</tr>
<tr>
<td>Award Investigator Count - Total</td>
<td>Award Prime Sponsor</td>
<td>Award Sole PI Flag</td>
<td></td>
</tr>
<tr>
<td>Award Investigator Employee ID</td>
<td>Award Prime Sponsor Code</td>
<td>Award Sponsor</td>
<td></td>
</tr>
</tbody>
</table>

All fields listed above are displayed in the Raw Data report page (see the Page Navigation section for more details).
Report Access

Accessing the Report via the Reporting Blink Page

This report is available via the eRAP Reports blink page. Clicking the Run Report button for this report will take you directly to the report.

Procedure

1. Go to the eRAP Reports Blink site: http://blink.ucsd.edu/research/data-analysis/erap-reporting-project/reports.html

2. Under the Research Administration Reports section, scroll to the block for the Current Support – My Awards report and click on the Run Report

3. You will be redirected to the Reporting Environment. Enter your Active Directory username and password to log in

4. Click OK

5. The report’s Formatted View is now displayed on the screen
Accessing a Previously Saved Report View

If you have created a Report View (see the Saving a Custom Report Version with Selected Filter Values section for details), you can still access your version from the Blink link.

Procedure

1. Go to the eRAP Reports Blink site:
   http://blink.ucsd.edu/research/data-analysis/erap-reporting-project/reports.html


3. Once the report opens, select My content from the Navigation Panel and locate your report. To run your report, locate it from the list and click on its name.

Note – the section, Saving a Custom Report Version with Selected Filter Values, demonstrates how to create the Report View and a tip to save the report as a “Favorite” to your browser for quicker access.
Accessing the Report via the Reporting Environment Directly

This report is available by directly accessing the Reporting Environment.

**Procedure**

1. Go to the Cognos Analytics web site: [https://bianalytics.ucsd.edu/ibmcognos/bi/](https://bianalytics.ucsd.edu/ibmcognos/bi/)
2. Enter your **Active Directory** username and password to log in
3. Click OK
4. You should now see the Cognos *Welcome* screen:

![Cognos Welcome Screen](image1.png)

5. Click on the **Team Content** icon

![Team Content Icon](image2.png)

6. From **Team Content**, navigate to the **Public Reports** folder
7. From **Public Reports**, navigate to the **Research Administration** folder
8. Locate **Current Support – My Awards** report
9. Click on the link for the report name to run the report

![Report List](image3.png)
10. The report’s *Formatted View* is now displayed on the screen.
Report Features

Investigator Role Filter
This report is filterable by investigator role, either PI (PI and Co-PI) or I (Co-I). Selecting an investigator role from the Investigator Role filter options will update the items displayed in the report to match the filter selection.

Procedure
1. From the Report Filter Parameters section, select an Investigator role to apply to your list of award record results
2. Click the Search button to apply your selections
3. The list of award records is now updated to only return records that match your filter criteria

Lead Unit Filter
This report is filterable by Lead Unit. Selecting a lead unit (or multiple lead units) from the Lead Unit filter option will update the items displayed in the report to only show those proposals that have Lead Units that match the selected filter value(s). Note that only lead units that appear in your award records will be displayed as selectable options in your filter.

Procedure
1. From the Report Filter Parameters section, select one or more Lead Units to apply to your list of award record results
2. Click the Search button to apply your selections
3. The list of award records is now updated to only return records that match your filter criteria
Organization Code Filter
This report is filterable by organization code. Selecting an organization (or multiple organizations) from the *Org Code* filter option will update the items displayed in the report to only show those proposals that have an Org Code that matches the selected filter value(s). Note that only org codes that appear in your award records will be displayed as selectable options in your filter.

**Procedure**

1. From the *Report Filter Parameters* section, select one or more organization codes from the *Org Code* filter to apply to your list of award record results

![Org Code filter](image)

2. Click the *Search* button to apply your selections
3. The list of award records is now updated to only return records that match your filter criteria

Sponsor Filter
This report is filterable by sponsor. Selecting a sponsor (or multiple sponsors) from the *Sponsor* filter option will update the items displayed in the report to only show those award records that have a Sponsor Name that matches the selected filter value(s). Note that only sponsors that appear in your award records will be displayed as selectable options in your filter.

**Procedure**

1. From the *Report Filter Parameters* section, select one or more sponsors from the *Sponsor* filter to apply to your list of award record results

![Sponsor filter](image)

2. Click the *Search* button to apply your selections
3. The list of award records is now updated to only return records that match your filter criteria
Clearing Filters

This report allows you to clear any/all filters you may have selected. Clicking the Reset Filters button will clear all filter selections and show all award records that were visible before any filters were applied.

Procedure

1. Select any filters you wish to apply to the report
2. Click Search to apply the filters
3. Once the report is returned, you will see your selected filters in the Selected Filter Values section at the top of the report results

4. After the filtered report is returned, click the Reset Filters button
5. The report is now returned to its original state, with no filter options selected.
Page Navigation
This report has multiple page views that are viewable via the top navigation TABS. Selecting a page view from the navigation tabs will take you to that report page.

Procedure

1. From the navigation tabs, select from one of the following options
   a. **Formatted View** – this is meant to be the 90% consumption mode of most users. The list is formatted to provide visual appeal, and quick access/grouping of the most commonly required data points
   b. **Raw Data** - this is meant for the user to export all data to excel for more in-depth analysis if required
   c. **Repeated Data** - this view is meant to allow a user to quickly copy select data into a Sponsor's Current and Pending Support form. This view shall show all award records where the Investigator is serving as a Principal Investigator or an Investigator on a proposal record.

2. Once a selection has been made, the report will automatically redirect to the selected page.

The following images are an example of what each of the report pages look like:
This view shows common data elements for each award record.

For each award record, the investigator who was first designated in the system as the “Principal Investigator” is listed first and shown as bolded. Then all other investigators designated as ‘PI’ are listed next, followed by those listed as ‘I’.

Each investigator grouping is listed in ascending alphabetical order.

You can view detailed information about each award record by clicking on the award number link. See the following section, Viewing Award Details for an Award Record for more information.
Viewing Award Details for an Award Record

UCSD’s Award system stores award information in a 3-tiered hierarchy, regardless of the length of the project or budget periods. Each tier is designed to support a different purpose.

Tier 1

Tier 1 is used for initial set up and to hold summary information. Tier 1, is know as the project history tier (or the “root” award) and represents the total project history for the award. The data found here is a “summary” of the project’s lengths and dollars.

Tier 2

Tier 2 is houses funding information and will represent a project period for a single or multi-year project.

Tier 3

Tier 3 is used to house year 1 dollars followed by continuations, amendments, no cost extensions, de-obligations, supplements, administrative amendments and renewals. Tier 3, or the budget period tier, contains individual budget period information for the corresponding fund.

Structure of the Report

For simplicity, the data displayed in this report is from the Tier 1. To view all tier information for any award record found in the report, click on the Award Number link in the Formatted View tab.

Clicking on the link for an award number will open up the Award Details page in a new browser tab
- This view displays all data fields listed in the *Report Fields* section.
- As an award record can have more than one investigator, or multiple funding source codes, or multiple science codes, please be careful to avoid double counting items (such as totals) when exporting this data to excel.
Repeated Data

- This view displays select data fields grouped together in a repeated form to ease the copying and pasting of information from the report to a sponsor’s Current & Pending Support form.
- Every group represents the information for a unique award record.
Opening the Corresponding Pending Support - My Proposals Report

This report has a corresponding sibling report that displays proposal records that are pending funding. You can access the Pending Support – My Proposals report from the link within this report.

Procedure

1. From the report’s navigation on the left, click on the Pending Support – My Proposals button under Open Report

2. Clicking on the Pending Support – My Proposals button will open that report in a new tab

3. For more information about how to use the Pending Support – Selected PIs report, please refer to the instructions for that report from the ERAP Reports Blink Page
Exporting the Report to Excel

The data visible in this report can be exported to Excel for further analysis. Selecting Run Excel will copy the report data to Excel.

Procedure

1. Click on the Run as icon located on the top left of the Toolbar and select Run Excel

2. Ensure that you allow pop-ups for this site, if needed

3. A new browser window will be generated and you will see the following message

   Your report is running.

   Instead of waiting, you can select a delivery method to run the report in the background.
   Select a delivery method.

   Cancel

4. Once the data has downloaded, you will be asked to either open or save the file

   Do you want to open or save Current Support-My Awards.xlsx (23.6 KB) Open Save Cancel

5. Select the option that matches what you would like to do with the data. Save as is recommended if you want to save a copy.
   a. Note – If using the Chrome or Safari browsers, you may not be asked whether to save or open the file. Instead, the downloaded file will appear on the bottom left of the browser window:
6. You may then be prompted with an *Internet Explorer Security* message. Click *Allow*

7. The report will now open in Excel
Saving a Custom Report Version with Selected Filter Values

Using Report Views offers users the ability to save prompt/filter values such that they can launch and run the report without the need to select values each time. An unlimited number of report views can be created for any report, each named according to its settings/use.

**Procedure**

1. Open the report
2. Once the report is displayed on the screen, select any filters you would like to always be applied when you run your ‘custom’ report
3. From the Add this Report icon on the top left of the Toolbar, select Save report as Report View option

![Save report...](image1)

4. From the Save as report view pop-up window, type in a **meaningful** name for the report you wish to save

![Save as report view](image2)

5. From the Location section of Save as report view, click the Select My Folders link

![Save as report view](image3)
6. Once you click *Select My Folders*, the location will update as:

![Location: My Folders](image1.png)

7. Click **OK**

8. To retrieve the saved copy, click on *My Content* from the left Navigation Panel. From the extended pane, locate the report you just saved.

![My content](image2.png)

9. Hovering over the report will display 3 vertical ellipses that will allow you to select the report’s context menu.

![Report View - My Awards - Test Copy](image3.png)

10. From the context menu, select **Run as**

![Run as](image4.png)
11. From the Run as pane, click the output format you want and ensure you select Prompt me from the options. Prompt me will allow you to view your saved version with all of your selected filters and also be able to modify the filters if you need to at a later time.

12. Click Run to get to your report

13. After having initially saved the report with its report settings, if you would like to be able to access the report in the future without having to navigate through the Reporting Environment’s interface, create a shortcut to it in your browser.