Current Support Report
Selected Units
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Overview

Purpose
The primary business objective for this report is to use current award data to understand the portfolio of one or more units.

This report would aim to answer the following business questions:

- What is Unit X’s current portfolio of awards that involve Unit X as the lead unit?
- What is Unit X’s current portfolio of awards that involve Unit X as a participating unit?
- What is the status of all current awards for Unit X?

*Current information is defined as information originating from the Coeus Award module, which is downloaded to the reporting environment on a nightly basis.

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**

Any user meeting the following criteria will be able to use this report:

1. All individuals who have been assigned a COEUS role that authorizes them to prepare and/or approve contract/grant proposals: this would include unit-level staff handling pre-award activity, unit-level approvers, and SPO reviewers/approvers. Ex Clinical Trial Coordinators/Project Managers, Fund Managers
2. Individuals who serve as Unit Heads (academic or administrative) at any level of the organization: this would include MSO's, DBO's, Asst. Deans, Asst. VC's, Chairs, Directors, Deans, VC's, and the Chancellor.
3. Assistants to the Unit Heads, meaning those individuals who would be pulling reports on behalf of the Unit Head.

Specifically, the report has been configured to allow the following ALTNG roles to access the report:

- Department Manager
- Department Approver
- Department Admin
- SPO Proposal Analyst
- SPO Awards Analyst
- SPO Viewer
- OPAFS Awards Analyst

If you would like to use this report, please ask your DSA to request for you one of the ALTNG roles listed above.
**Report Fields**

This report makes use of the following fields, listed below in alphabetical order:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Field Name</th>
<th>Field Name</th>
<th>Field Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Academic Year Effort</td>
<td>Award REMS Foreign Indicator</td>
<td>Investigator Count - PI</td>
<td>Science Code Name</td>
</tr>
<tr>
<td>Activity Type</td>
<td>Award REMS Sponsor Agency</td>
<td>Investigator Count - PI</td>
<td>Sole PI Flag</td>
</tr>
<tr>
<td>Activity Type Code</td>
<td>Award REMS Sponsor Category</td>
<td>Investigator Count - Total</td>
<td>Sponsor</td>
</tr>
<tr>
<td>Anticipated Direct Cost</td>
<td>Award REMS Sponsor Sub-Agency</td>
<td>Lead Department Code</td>
<td>Sponsor Award Number Tier1</td>
</tr>
<tr>
<td>Anticipated Indirect Cost</td>
<td>Award Status</td>
<td>Lead Department Name</td>
<td>Sponsor Code</td>
</tr>
<tr>
<td>Award Budget Period End Date</td>
<td>Award Title</td>
<td>Obligated Direct Cost</td>
<td>Summer Effort</td>
</tr>
<tr>
<td>Award Budget Period Start Date</td>
<td>Award Transaction Type</td>
<td>Obligated Indirect Cost</td>
<td>Total Anticipated Cost</td>
</tr>
<tr>
<td>Award Fund Number</td>
<td>Award Type</td>
<td>Pending Direct Cost</td>
<td>Total Obligated Cost</td>
</tr>
<tr>
<td>Award Organization Code</td>
<td>Award Type Code</td>
<td>Pending Indirect Cost</td>
<td>Total Pending Cost</td>
</tr>
<tr>
<td>Award Organization Name</td>
<td>Award UCSD Prime Sponsor Major Agency</td>
<td>Percent Effort</td>
<td>UCSD Award Number - Base</td>
</tr>
<tr>
<td>Award Overall End Date</td>
<td>Award UCSD Sponsor Major Agency</td>
<td>Prime Sponsor</td>
<td>UCSD Award Number - Full</td>
</tr>
<tr>
<td>Award Overall Start Date</td>
<td>Calendar Year Effort</td>
<td>Prime Sponsor Code</td>
<td>VC Area Name</td>
</tr>
<tr>
<td>Award Prime Sponsor REMS Foreign Indicator</td>
<td>Cost Sharing Total</td>
<td>Principal Investigator Employee ID</td>
<td>VC Area Name for Principal Investigator’s Home Unit</td>
</tr>
<tr>
<td>Award Prime Sponsor REMS Sponsor Agency</td>
<td>ePD Number</td>
<td>Principal Investigator Full Name</td>
<td></td>
</tr>
<tr>
<td>Award Prime Sponsor REMS Sponsor Category</td>
<td>Funding Source Code Name</td>
<td>Principal Investigator Home Unit</td>
<td></td>
</tr>
<tr>
<td>Award Prime Sponsor REMS Sponsor Sub-Agency</td>
<td>Institute Proposal Number</td>
<td>Principal Investigator Home Unit Code</td>
<td></td>
</tr>
</tbody>
</table>

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

Accessing the Report via the Reporting Blink Page

This report is available via the eRAP Reporting 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 page:
2. [http://blink.ucsd.edu/research/data-analysis/erap-reporting-project/reports.html](http://blink.ucsd.edu/research/data-analysis/erap-reporting-project/reports.html)
3. Under the Research Administration Reports section, click on the Run Report button for the Current Support – Selected Units report
4. You will be redirected to the Reporting Environment. Enter your Active Directory username and password to log in
5. Click OK
6. The report’s filter options are now displayed on the screen
Accessing the Report via the Reporting Environment Directly
This report is available by going directly to the Reporting Environment.

Procedure

1. Go to the Cognos web site: 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:

5. Click on the Team Content icon

6. From Team Content, navigate to the Public Reports folder
7. From Public Reports, navigate to the Research Administration folder
8. Locate the Current Support – Selected Units report
9. Click on the report name to run the report
10. The report’s filter options are now displayed on the screen
Accessing a Previously Saved Report View
You can access your previously saved report version(s) from the reporting environment

Procedure

1. Go to the Cognos web site: 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:

   ![Welcome screen image]

5. From the welcome page 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.

   ![My content image]

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.
Report Features

Selecting Initial Report Filters

On initial report run, the first screen presented to the user will be the Report Filter Parameters page. To display report data, a user must first select the filters he/she would like to apply to the report from the filter choices page. Once any/all filters choices are selected, the report will continue to the Formatted View page and show only those award records that match the selected filter values.

Procedure

1. Select your initial filter values from one or more filter options from the report’s Report Filter Parameters page

![Current Support - Selected Units](image-url)

Note, this report allows you to filter on an award’s lead unit or home unit for the investigator designated as the “principal investigator” for that award. Therefore, the selection(s) made in the Lead Unit/Investigator Home Unit filter parameter will return all award records that match the selected choice(s) in either the lead unit or the home unit fields.

2. Click the Run Report button

![Run Report](image-url)

3. Your filter options should now be visible in the Selected Filter Values table
Using the Narrow Filter Selections Button

You can take advantage of the Narrow Filter Selections button in the Report Filter Parameters page to help you narrow down the list of filter options. By making an initial selection on any filter type and then clicking the Narrow Filter Selections button, you will limit the other filter’s selectable values to only those that are appropriate to your initial selections.

**Procedure**

1. From the Report Filter Parameters page, make a selection to **one** of the filter options.
2. After selecting your initial value(s) from one of the filter options, click on Narrow Filter Selections.
3. The remaining filter options will be refreshed. The new choices displayed will only be applicable for the existing filter selections (the values you have checked).
4. You can then pick a second filter choice and click the Narrow Filter Selections button once again to continue to narrow the remaining applicable filter choices.
5. Once finished making selections, click Run Report to reload the report with the new filter choices.
6. The report will now only return records that match your new filter criteria.

For example, if you pick **Physics** as your initial value from the Lead Unit/Investigator Home Unit filter and click on Narrow Filter Selections, notice that now the Lead Unit section will only show **Physics** as the only choice in that box. Additionally, now the Organization Code filter options have narrowed down to a handful of options that are only applicable to the **Physics** department. The same principle is true for all other filter options.
Updating Filter Options

This report allows you to reset any or all filters that have been previously selected. Unchecking a specific filter value will clear those filter selections and reset the report to only display records that match the newly selected options.

Procedure

1. After having run the report, click on the Back to Prompts button from the report’s left navigation menu to return to the Report Filter Parameters page

2. Once you are returned back to the Report Filter Parameters page, you will see your existing filter options still selected

3. Clearing Filter Values
   a. Clearing All Values
      Click on the Clear Filters button to reset all filter options back to their default state

   b. Clearing Specific Filter Values
      If alternately, you would only like to clear a specific filter value, uncheck that particular option and click on Narrow Filter Selections to rerun your selections on the remaining checked options only.

4. Once the filters have been reset, select any new options you wish to see in the report

5. Once finished making selections, click Run Report to reload the report with the new filter choices

6. The report will now only return records that match your new filter criteria
Report Tab Navigation

This report has multiple page tabs that are viewable on the top left of the reports main window. Selecting a page tab will take you to that report page.

![Report Tab Navigation](image)

**Procedure**

1. From the top left corner of the report’s main window (after having picked initial filter parameters) select from one of the following options
   
   a. **Formatted View** – this page is meant to be the 90% consumption mode of most users. The list displayed is formatted to provide visual appeal, and quick access/grouping of the most commonly required data points. This is the default tab for the report
   
   b. **Raw Data** – this page is meant for the user to export all data to excel for more in-depth analysis, if required

2. Once a tab has been clicked, the report’s output will change to match the user’s selection

The following images are an example of what each of the report tabs look like:
This tab has three possible sort options:
- Lead Unit (the default option)
- PI Home Unit
- Principal Investigator

This tab displays all data fields listed in the Report Fields section.

As an award record can have more than one investigator, or multiple science codes, please be careful to avoid double counting items (such as totals) when exporting this data to 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
4. From the Save as report view pop-up window, type in a meaningful name for the report you wish to save
5. From the Location section of Save as report view, click the Select My Folders link
6. Once you click *Select My Folders*, the location will update as:

![Location update](image)

7. Click **OK**

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

![My Content](image)

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

![Context menu](image)

10. From the context menu, select **Run as**
11. From the Run as pane, click the output format you want (Excel, PDF, or HTML) 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.
Exporting the Report to Excel

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

Procedure

1. Click the “Run” icon on the top left corner of the report

2. Select the Run Excel option

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

4. Once the data has downloaded, you will be asked to either open or save the file (depending on the browser you are using)

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. If using Internet Explorer, you may be prompted with the following Security message. Click **Allow** to continue on to the Excel file.

7. The report will now open in Excel