Pending Support Report – My Proposals
# Table of Contents

Overview .......................................................................................................................... 3  
Purpose .................................................................................................................................. 3  
Proposal Records Displayed in Report ............................................................................. 3  
Report Security .................................................................................................................. 3  
Report Fields .................................................................................................................... 4  
Report Access ..................................................................................................................... 5  
  Accessing the Report via the Reporting Blink Page ...................................................... 5  
  Accessing the Report via the Reporting Environment Directly ........................................ 6  
  Accessing a Previously Saved Report View ................................................................. 8  
Report Features .................................................................................................................. 9  
  Investigator Role Filter ................................................................................................. 9  
  Lead Unit Filter ............................................................................................................ 10  
  Sponsor Filter ............................................................................................................... 11  
  Clearing Filters ............................................................................................................ 12  
Page Navigation .................................................................................................................. 14  
  Customized View .......................................................................................................... 15  
  Report Charts ................................................................................................................ 15  
  Repeated Data ............................................................................................................... 17  
  Raw Data ....................................................................................................................... 18  
Exporting the Report to Excel ........................................................................................... 19  
Saving a Custom Report Version with Selected Filter Values ...................................... 21
Overview

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

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

- What is my current* portfolio of proposals?
- What is the status of all of my current* proposals?

*Current information is defined as information originating from the Electronic Proposal Development system, ePD, which is downloaded to the reporting environment on a nightly basis.

Proposal Records Displayed in Report

This report displays information about proposal records created through ePD. Any proposal record created outside ePD will not show up in this report.

As this report is meant to display a current list of pending proposals, the report automatically excludes all proposal records whose official status has been marked as

- Funded
- Not Funded
- Voided
- Withdrawn from UC San Diego

Report Security

An investigator will only see records where he or she is named as either a Principal Investigator, Co-Principal Investigator, or Co-Investigator. Therefore, all investigators listed on a proposal record will see that record in his/her version of the My Proposals 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>Academic Year Effort</td>
<td>IP Number</td>
<td>Proposal Investigator</td>
<td>Proposal Type</td>
</tr>
<tr>
<td>Budget Cost Sharing Amount</td>
<td>Lead Unit</td>
<td>Proposal Investigator</td>
<td>SIO Science Code Name</td>
</tr>
<tr>
<td>Budget Total Cost</td>
<td>Lead Unit Code</td>
<td>Proposal Investigator</td>
<td>SIO Science Code</td>
</tr>
<tr>
<td>Budget Total Direct Cost</td>
<td>OP Reporting Date</td>
<td>Proposal Investigator</td>
<td>SIO Funding Source Code</td>
</tr>
<tr>
<td>Budget Total Indirect Cost</td>
<td>Org Code</td>
<td>Proposal Investigator</td>
<td>SIO Funding Source Code</td>
</tr>
<tr>
<td>Calendar Year Effort</td>
<td>Org Code Title</td>
<td>Proposal Investigator</td>
<td>Sponsor Code</td>
</tr>
<tr>
<td>Created By</td>
<td>Percent Effort</td>
<td>Proposal Requested End Date</td>
<td>Sponsor Name</td>
</tr>
<tr>
<td>Created By Employee ID</td>
<td>Prime Sponsor Code</td>
<td>Proposal Requested Start Date</td>
<td>Summer Effort</td>
</tr>
<tr>
<td>Created Date</td>
<td>Prime Sponsor Name</td>
<td>Proposal Status</td>
<td>UCSD Proposal Type</td>
</tr>
<tr>
<td>ePD Number</td>
<td>Proposal Deadline Date</td>
<td>Proposal Title</td>
<td>VC Unit Name</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](http://blink.ucsd.edu/research/data-analysis/erap-reporting-project/reports.html)

2. Under the *Research Administration Reports* section, click on the *Run Report* button for the *Pending Support – My Proposals* 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 *Customized View* is now displayed on the screen
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:

![Welcome screen](image)

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

![Team Content icon](image)

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

![Pending Support - My Proposals](image)
10. The report’s Customized 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 Cognos 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

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.

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

Investigator Role Filter
This report is filterable by investigator role, either PI or 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 proposal results.
2. If you wish to deselect the Investigator Role filter value, select the Deselect all option.
3. Click the Search button to apply your selections.
4. The list of proposals is now changed 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 proposal records will be displayed in your list of filter options.

Procedure
1. From the Report Filter Parameters section, select one or more Lead Units to apply to your list of proposal results

<table>
<thead>
<tr>
<th>Lead Unit</th>
</tr>
</thead>
<tbody>
<tr>
<td>Neurosciences (000304)</td>
</tr>
<tr>
<td>Physics (000220)</td>
</tr>
</tbody>
</table>

   Select all  Deselect all

2. Click the Search button to apply your selections
3. The list of proposals will now only show 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 proposals that have a Sponsor Name that matches the selected filter value(s). Note that only sponsors that appear in your proposal records will be displayed in your list of filter options.

Procedure

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

2. Click the Search button to apply your selections
3. The list of proposals will now show only 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 report records that were visible before 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. **Customized 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. **Report Charts** - this view is meant to provide the user with a visual representation of some of the data available in the report. Specifically, the charts in the report are
      i. Proposal Budget by Investigator Role
      ii. Proposals by Sponsor
   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 proposals where the Investigator is serving as a Principal Investigator or an Investigator on a proposal record.
   d. **Raw Data** - this is meant for the user to export all data to excel for more in-depth analysis if required

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:
Customized View

- This view shows common data elements for each proposal number
- For each proposal, the investigator 1st designated in the ePD system as a ‘PI’ is listed first, then all other investigators designated as ‘PI’ are listed, and finally those listed as ‘I’ are listed last
- Each investigator grouping is listed in alphabetical order, ascending

Report Charts

The Report Charts page allows you to see three graphical representations of the data

- Proposal Budget By Investigator Role
- Proposals By Sponsor
- My Pending Effort
Proposal Budget by Investigator Role

- This chart shows the sum of the total budget (direct cost + indirect cost) for each proposal record that meets the selected filter values criteria.
- The budget is broken out into the possible investigator roles available in the records that meet the selected filter values criteria.

Proposals By Sponsor

- This chart shows a breakdown of the total number of proposals for each sponsor listed in the proposal records that meet the selected filter values criteria.

My Pending Effort

- This chart shows a breakdown of effort, by effort type for each proposal record that meets the selected filter values criteria.
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 proposal record.
- This view displays all data fields listed in the *Report Fields* section.
- As a proposal 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.
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

   ![Message](image)

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

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**

![Internet Explorer Security Warning]

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

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:
7. Click **OK**

8. You will then be returned to the *Welcome* screen.

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

![Image of My Content pane](image1)

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

![Image of context menu](image2)

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

![Image of Run as pane](image3)

12. 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.
13. Click *Run* to get to your report

14. 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.