Pending Support Report
Selected PIs
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Overview

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

The secondary purpose is to inform business decisions about related matters (e.g., responding to requests for matching funding or for teaching relief, or considering potential space needs, or facilitating the analysis and distribution of staff workload).

This report would be used by Administrative/Academic Unit Heads and their Assistants, and by Contract & Grant Preparers and Approvers to answer the following business questions:

- What is investigator X's current* portfolio of proposals?
  - Note that investigators looking for their own portfolio of proposals will obtain this same information from the Pending Support - My Proposals report
- What is the current* portfolio of proposals for a specified group of investigators?
  - e.g., all of the investigators I serve as Fund Manager, or all of the investigators in my unit
- Which of Unit Y’s investigators are currently* listed in proposals running through any lead unit?

*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 of 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- Withdrawn from UC San Diego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

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

1. All individuals who have been authorized 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.
   a. e.g., 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

If you would like to use this report, please ask your DSA to request 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</th>
<th>Field</th>
<th>Field</th>
<th>Field</th>
</tr>
</thead>
<tbody>
<tr>
<td>Budget Cost Sharing Amount</td>
<td>Funding Source</td>
<td>Proposal Investigator</td>
<td>Proposal Title</td>
</tr>
<tr>
<td>Budget Total Cost</td>
<td>IP Number</td>
<td>Proposal Investigator Employee ID</td>
<td>Proposal Type</td>
</tr>
<tr>
<td>Budget Total Direct Cost</td>
<td>Lead Unit</td>
<td>Proposal Investigator</td>
<td>Science Code Description</td>
</tr>
<tr>
<td>Budget Total Indirect Cost</td>
<td>Lead Unit Code</td>
<td>Proposal Investigator</td>
<td>Science Code</td>
</tr>
<tr>
<td>Created By</td>
<td>Lead Unit Parent Unit</td>
<td>Proposal Investigator</td>
<td>Sponsor Code</td>
</tr>
<tr>
<td>Created By Employee ID</td>
<td>OP Reporting Date</td>
<td>Proposal Investigator</td>
<td>Sponsor Name</td>
</tr>
<tr>
<td>Created Date</td>
<td>Prime Sponsor Code</td>
<td>Proposal Requested End Date</td>
<td>UCSD Proposal Type</td>
</tr>
<tr>
<td>ePD Number</td>
<td>Prime Sponsor Name</td>
<td>Proposal Requested Start Date</td>
<td></td>
</tr>
<tr>
<td>Funding Source Code</td>
<td>Proposal Deadline Date</td>
<td>Proposal Status</td>
<td></td>
</tr>
</tbody>
</table>

All fields listed above are displayed in the Raw Data View 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 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 site:
3. Under the Research Administration Reports section, click on the Run Report button for the Pending Support – Selected PIs 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 directly accessing the Reporting Environment. Navigating to the Reporting Environment directly will also allow you to access the report.

**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:

![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

![Report options](image)

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:

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, Error! Reference source not found.Error! Reference source not found., 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 this filter choices page. Once any/all filters choices are selected, the report will continue to the Formatted Data View page and show only proposal 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

2. Click the Run Report button

3. Your filter options should now be visible in the Selected Filter Values table
Updating Filters

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.

Selecting New Filter Options

1. 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. Click on the Clear Filters button to reset all filter options back to their default state
4. Once all 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
Using the Apply Contextual Filters Button

You can take advantage of the *Apply Contextual Filters* 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 *Apply Contextual Filters* button, you will narrow down the other filter’s selectable values to only those that are appropriate to your initial selections.

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 *Apply Contextual Filters*
3. The remaining filter options will be refreshed. The new choices displayed will only be applicable for the initial filter selection.
4. You can then pick a second filter choice and click the *Apply Contextual Filters* 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* filter and click on *Apply Contextual Filters*, 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.
Page Navigation
This report has multiple page views that are viewable via the Navigation choice menu. Selecting a page view from the Navigation drop down will take you to that report page.

Procedure

1. From the Navigate to Page drop down, select from one of the following options
   a. Formatted Data View – this page 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 View - this page is meant for the user to export all data to excel for more in-depth analysis, if required
   c. Charts and Graphs View - this page is meant to provide the user with a visual representation of the data available in the report. Specifically, the charts in the report are
      i. Proposals by Deadline Date
      ii. Proposal Budget by Investigator’s Lead Unit & Role
      iii. Proposal Budget by PI
      iv. Proposal Budget by Sponsor
      v. Proposal Budget by Status
   d. Repeated Data View - 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.

2. Once a selection has been made, the report will be redirected to the selected page

The following images are an example of what each of the report pages look like:
This view has data elements grouped by Investigator in alphabetical order, ascending.

Within each investigator grouping, the lead unit is sorted in alphabetical order, ascending.

Within each lead unit sub-group, the Project Begin Date (corresponding to the Proposal Requested Start Date field) is listed in chronological order.

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

As a proposal 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.
Charts & Graphs View

The *Charts & Graphs* page, allows you to see 5 different graphical representations of the data

- Proposals by Deadline Date
- Proposal Budget by Investigator’s Lead Unit & Role
- Proposal Budget by PI
- Proposal Budget by Sponsor
- Proposal Budget by Status

Each chart is displayed by itself. To select one of the charts, pick the one you’d like to see from the *Select Chart* drop down list:

**Proposals By Deadline Date**

- This chart shows the number of proposals due on different deadline dates for each proposal that meets the selected filter values criteria
- Note – Not all proposals with past deadline dates mean that those proposals are late. The chart just shows the deadline date of ALL pending proposal records
This chart shows the total budget (direct cost + indirect cost) for each investigator that meets the selected filter values criteria.

For each investigator listed, the budget columns are broken out by Lead Unit and Investigator Role.

Hovering over each bar will display the numerical budget total corresponding to that bar.

This chart is accompanied by a Tabular Display of the chart’s data to make it easy to see all values side by side.

In the example above, you can see that investigator Christinson, Marisol has budgets for two lead units, Neurosciences and Physics. She is only serving as a PI for all Physics proposals and she has proposals where she is both a ‘PI’ and an ‘I’ in the Neurosciences unit.
Proposal Budget By PI

- This chart shows the sum of the total budget (direct cost + indirect cost) for each PI that meets the selected filter values criteria.
- Hovering over each bar will display the numerical budget total corresponding to that bar and the % of the total budget for all selected records that a specific bar represents.
- This chart is accompanied by a Tabular Display of the chart’s data to make it easy to see all values side by side.
- In this example, you can see that only Christinson, Marisol has proposal records with budget data filled in. Therefore, out of all of the selected records, Christinson, Marisol’s proposal’s budgets represent 100% of the total budget.
This chart shows the sum of the total budget (direct cost + indirect cost) for each **sponsor** that meets the selected filter values criteria.

Hovering over each bar will display the numerical budget total corresponding to that bar and the % of the total budget for all selected records that a specific bar represents.

This chart is accompanied by a *Tabular Display* of the chart’s data to make it easy to see all values side by side.
Proposal Budget By Status

- 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 proposals are broken out into their different statuses. Potential status values include:
  - In Progress
  - Approval in Progress
  - Submitted
- In the example above, you can see that there are no proposal records in the Submitted status for the selected filter values.
Repeated Data View

- 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.
- To use this view most efficiently, it is recommended that you filter for a single investigator at a time to avoid accidentally copying information from other investigators into a particular investigator’s pending portion of the sponsor form.
Opening the Corresponding Selected Units Report

This report has a corresponding sibling report that displays data by units versus by investigator. This report provides a link to access the Selected Units report from within the Selected PIs report.

Procedure

1. From the report’s navigation left pane, click on the Selected Units button.

2. Clicking on the Selected Units button will open the Selected Units report in a new tab.

3. For more information about how to use the Selected Units report, please see the instructions for that report found in the reports blink page.
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

   ![Run icon](Image)

2. Select the *Run Excel* option

   ![Run options](Image)

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 (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. You may then be prompted with an Internet Explorer Security message. Click Allow

7. The report will now open in Excel