Pending Support Report
Selected Units
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Overview

Purpose
The primary business objective for this report is to use pending proposal 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 proposals that involve Unit X as the lead unit?
- What is Unit X’s current* portfolio of proposals that involve Unit X as a participating unit?
- What is the status of all current* proposals for Unit X?

*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- Withdrawn from UC San Diego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 grant 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</th>
<th>Field</th>
<th>Field</th>
<th>Field</th>
</tr>
</thead>
<tbody>
<tr>
<td>Academic Year Effort</td>
<td>Lead Unit</td>
<td>Proposal Investigator</td>
<td>SIO Funding Source</td>
</tr>
<tr>
<td>Budget Cost Sharing Amount</td>
<td>Lead Unit Code</td>
<td>Proposal Investigator</td>
<td>SIO Funding Source Code</td>
</tr>
<tr>
<td>Budget Total Cost</td>
<td>OP Reporting Date</td>
<td>Proposal Investigator</td>
<td>Sole PI</td>
</tr>
<tr>
<td>Budget Total Direct Cost</td>
<td>Org Code</td>
<td>Proposal Investigator</td>
<td>Sponsor Code</td>
</tr>
<tr>
<td>Budget Total Indirect Cost</td>
<td>Org Code Title</td>
<td>Proposal Requested</td>
<td>Sponsor Name</td>
</tr>
<tr>
<td>Calendar Year Effort</td>
<td>Percent Effort</td>
<td>Proposal Requested</td>
<td>Summer Effort</td>
</tr>
<tr>
<td>Created By</td>
<td>Prime Sponsor Code</td>
<td>Proposal Status</td>
<td>UCSD Proposal Type</td>
</tr>
<tr>
<td>Created By Employee ID</td>
<td>Prime Sponsor Name</td>
<td>Proposal Title</td>
<td>VC Unit Name</td>
</tr>
<tr>
<td>Created Date</td>
<td>Proposal Deadline Date</td>
<td>Proposal Type</td>
<td></td>
</tr>
<tr>
<td>ePD Number</td>
<td>Proposal Investigator</td>
<td>Science Code</td>
<td></td>
</tr>
<tr>
<td>IP Number</td>
<td>Proposal Investigator</td>
<td>Science Code</td>
<td></td>
</tr>
</tbody>
</table>

All fields listed above are displayed in the *Raw Data View* report page (see the *Raw Data View* 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 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 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/
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]

5. Click on the Team Content icon

![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 Pending Support – My Proposals report
9. Click on the link for the report name to run the report

![Pending Support - My Proposals]

![Pending Support - Selected Pls]

![Pending Support - Selected Units]
10. The report’s filter options are 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/
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

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 prompt page

This report has the following filter selections to choose from:

a. **Lead Unit / Home Unit** – This report is filterable by Lead Unit/Home Unit. Selecting/Deselecting a lead unit/home unit (or multiple lead units/home units) from the Lead Unit/Home Unit filter option will update the items displayed in the report to only show those proposals that have Lead Units OR Home Units that match the selected filter value(s).

b. **Organization** – This report is filterable by a proposal’s organization code. Selecting/Deselecting a proposal’s organization code (or multiple organization codes) for the Organization filter option will update the items displayed in the report to only show those proposal records whose Organization matches the selected filter value(s).

c. **Sponsor** – This report is filterable by sponsor. Selecting/Deselecting 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).
2. Once you make a selection in any one of the parameter boxes, you can select the Apply Contextual Filters button to update the values in the remaining parameter boxes. For example, if you select Physics as the Lead Unit / Home Unit and click on Apply Contextual Filters, all remaining parameter drop downs will update to only show values that have Physics set as the Lead Unit. You can do this continuously with your remaining selections.

3. If you’d like to reset all filter values to their original state, click on the Clear Filters button.

4. Click the Run Report button to run your report with the selected filter criteria.

5. Your filter options should now be visible in the Selected Filter Values table
Clearing Filters
This report allows you to clear any/all filters you may have selected. Deselecting a specific filter value will clear that filter selection.

Procedure

1. Click on the Back to Prompts button from the report’s navigation section

2. For any of the available filter options, scroll through and deselect the checkbox of any unwanted filter values or, if applicable, click on the Deselect all link.

   Alternately, if you’d like to deselect all of your selected parameters, you can click on the Clear Filters button.

3. Once you’ve made your new report selections, click on the Run Report button to re-run the report without the unwanted filter selections.

4. Once the report reloads, check that the Selected Filter Values table is updated and the report shows the appropriate records.
Sorting the Formatted Data View

This report allows you to sort the data displayed in the Formatted Data View by the options in the Sort By drop down list. Selecting a sorting option will update the Formatted Data View display to the corresponding sort choice.

NOTE – in order to list a given proposal at most once in this view, this report only shows data that is associated with the investigator designated as the Principal Investigator in the ePD system. If you need details about Co-PIs or Co-Is, please use the Selected PIs report.

Procedure

1. From the Sort drop down, select from one of the following options
   a. Lead Unit – shows proposal records grouped by lead unit in alphabetical order. This is the default sort order.
   b. PI Home Unit – shows proposal records grouped by Principal Investigator’s lead unit in alphabetical order
   c. Principal Investigator – shows proposal records grouped by the Principal Investigator in alphabetical order
2. Once a selection has been made, the Formatted Data View will be sorted by the selected option
- This sort option is the default sort for the Formatted data view
- This sort options shows proposal records grouped by lead unit in alphabetical order
- Within each lead unit grouping, the proposals are first sorted by the Principal Investigator’s last name in alphabetical order, then by the proposal’s start date
- The total budget cost is subtotaled for each lead unit group
• This sort option shows proposal records grouped by Principal Investigator’s home unit in alphabetical order
• Within each home unit grouping, the proposals are first sorted by the Principal Investigator’s last name in alphabetical order, then by Lead Unit in alphabetical order, and then by the proposal’s start date
• The total budget cost is subtotaled for each home unit group
- This sort option shows proposal records grouped by the Principal Investigator in alphabetical order.
- Within each Principal Investigator grouping, the proposals are first sorted by Lead Unit and then by the proposal’s start date.
- The total budget cost is subtotaled for each Principal Investigator group.
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 is meant to be the 90% consumption mode of most users. The list should be formatted to provide visual appeal, and quick access/grouping of the most commonly required data points
   b. **Raw Data View** - this is meant for the user to export all data to excel for more in-depth analysis if required
   c. **Charts and Graphs View** - this view is meant to provide the user with a visual representation of the data available in the report. Specifically, the charts in the report shall be
      i. Proposals Count by Lead Unit
      ii. Total Budget By Lead Unit
      iii. Proposal Count by PI Home Unit
      iv. Total Budget by PI Home Unit
      v. Proposal Count by Sponsor
      vi. Total Budget by Sponsor
      vii. Total Budget by Lead Unit
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 groups data elements, depending on the sort selected, by:

- **Lead Unit**, listed in alphabetical order
  - Within each lead unit grouping, proposals are sorted first by *Proposal Investigator’s last name* and then by *Project Start Date*
  - The total budget cost is subtotaled for each lead unit group
- **Home Unit**, listed in alphabetical order
  - Within each home unit grouping, the proposals are first sorted by the Principal Investigator’s last name in alphabetical order, then by Lead Unit in alphabetical order, and then by the proposal’s start date
  - The total budget cost is subtotaled for each home unit group
- **Principal Investigator**, listed in alphabetical order
  - Within each Principal Investigator grouping, the proposals are first sorted by Lead Unit and then by the proposal’s start date
  - The total budget cost is subtotaled for each Principal Investigator group
This view displays all data fields listed in the *Report Fields* section.

As a proposal record can have more than one 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.
Charts & Graphs View

The Charts & Graphs page, allows you to see 3 different graphical/tabular representations of the data:

- Count and Budget by Lead Unit
- Count and Budget by PI Home Unit
- Count and Budget by Sponsor

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:

**Count and Budget by Lead Unit Charts & Tables**

- **Proposal Count By Lead Unit**
  - Shows the number of proposals for each lead unit that meets the selected filter values criteria
  - Hovering over the chart bars will show the count of proposals for a the selected lead unit

- **Total Budget by Lead Unit**
  - Shows the total budget, split by direct and indirect cost for each lead unit that meets the selected filter values criteria
  - Hovering over a specific lead unit’s chart bar will show the total cost, either direct or indirect

This report has two charts and a table related to lead units:

1. **Proposal Count By Lead Unit**
   a. Shows the number of proposals for each lead unit that meets the selected filter values criteria
   b. Hovering over the chart bars will show the count of proposals for a the selected lead unit

2. **Total Budget by Lead Unit**
   a. Shows the total budget, split by direct and indirect cost for each lead unit that meets the selected filter values criteria
   b. Hovering over a specific lead unit’s chart bar will show the total cost, either direct or indirect

3. **Total Budget By Lead Unit**
   a. This shows a tabular display of the information that Proposal Count By Lead Unit and Total Budget By Lead Unit are representing graphically
b. The tabular display breaks the proposals by two categories
   i. Home Unit Equal to Lead Unit, if any
   ii. Home Unit Not Equal to Lead Unit, if any

c. The tabular display also totals up the two columns mentioned in 3b into their corresponding totals under the **Total** column

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**Count and Budget by PI Home Unit Charts & Tables**

This report has two charts and a table related to PI home units

1. **Proposal Count By PI Home Unit**
   a. Shows the number of proposals for each home unit that meets the selected filter values criteria
   b. Hovering over the chart bars will show the count of proposals for a the selected PI home unit

2. **Total Budget by PI Home Unit**
   a. Shows the total budget, split by direct and indirect cost for each PI home unit that meets the selected filter values criteria
   b. Hovering over a specific PI home unit’s chart bar will show the total cost, either direct or indirect

3. **Total Budget By PI Home Unit**
   a. This shows a tabular display of the information that **Proposal Count By PI Home Unit** and **Total Budget By PI Home Unit** are representing graphically
   b. The tabular display breaks the proposals by two categories
      i. Home Unit Equal to Lead Unit, if any
      ii. Home Unit Not Equal to Lead Unit, if any
   c. The tabular display also totals up the two columns mentioned in 3b into their corresponding totals under the **Total** column
This report has two charts and a table related to Sponsors

1. **Proposal Count By Sponsor**
   a. Shows the number of proposals for each sponsor that meets the selected filter values criteria
   b. Hovering over the chart bars will show the count of proposals for a the selected sponsor

2. **Total Budget By Sponsor**
   a. Shows the total budget, split by direct and indirect cost for each sponsor that meets the selected filter values criteria
   b. Hovering over a specific sponsor’s chart bar will show the total cost, either direct or indirect

3. **Total Budget By Sponsor**
   a. This shows a tabular display of the information that Proposal Count By Sponsor and Total Budget By Sponsor are representing graphically
   b. The tabular display breaks the proposals by two categories
      i. Home Unit Equal to Lead Unit, if any
      ii. Home Unit Not Equal to Lead Unit, if any
   c. The tabular display also totals up the two columns mentioned in 3b into their corresponding totals under the Total column
Opening the Corresponding Selected PIs Report

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

**Procedure**

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

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

3. For more information about how to use the Selected PIs 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 View in Excel 2007 Format 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

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 dialog box]

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

![Add this Report icon](image)

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](image)

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

![Select My Folders](image)

6. Once you click Select My Folders, the location will update as:
7. Click **OK**

8. You will then be returned to *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.

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

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

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.