Proposal and Award Lookup Tool
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Overview

Purpose
The primary business objective for this report is to allow Coeus users the ability to find all linking identifier numbers for proposal and award records throughout the Coeus modules. A user will be able to search for an EPD number, Institute Proposal number or UCSD Award number and find the matching identifier for the other systems, if one exists.

Additionally, the report will show high-level information, including the status of each record, for each of the modules for any information returned from a search.

Report Security
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

If you would like to use this report, please ask your DSA to grant you one of the ALTNG roles listed above.

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:
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 Show Reports to expand all available reports
4. Navigate to the Proposal and Award Lookup section.
   a. This section will display a short overview about the report and the following two buttons
b. The *Show details* button will provide high level information about the report
c. The *Run report* button will redirect you to the reporting environment

5. Click on **Run Report**. You will be redirected to the Reporting Environment.
6. Enter your *Active Directory* username and password to log in
7. Click OK
8. If you have access to the report, the report will load on the screen:

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**Report Features**

**Report Tabs**
The report displays the data that is returned from a search in three different tabs. Selecting one of the tabs from the top left section of the report will take you to the appropriate data view.
- **EPD Information tab**
  - This is the report’s default tab
  - This tab shows the EPD data fields available for the searched parameter if there is a match in the EPD system. Depending on the search parameter, this tab may be empty but the other two tabs could contain information.

- **Institute Proposal Information tab**
  - This tab shows Institute Proposal data fields for the searched parameter, if there is a match in the Institute Proposal system. Depending on the search parameter, this tab may be empty but the other two tabs could contain information.

- **Award Information tab**
  - This tab shows Award data fields for the searched parameter, if there is a match in the Award system. Depending on the search parameter, this tab may be empty but the other two tabs could contain information.

To navigate to any of the available tabs, click on the appropriate tab’s name. The selected tab will appear with a blue bar above the tab’s name.

The following images are an example of what each of the report’s tabs look like.

**EPD Information Tab**

- This view will show high level information about the EPD record
- The *Summary Information* table displays the corresponding IDs for the Institute Proposal module and the Award module, if any exist for the searched parameter.
Institute Proposal Information Tab

- This view will show high level information for the Institute Proposal record
- The Summary Information table displays the corresponding IDs for the EPD module and the Award module, if any exist for the searched parameter

Institute Proposal Number - 20162508
- IP Number: 20162508
- Status: Submitted

Award Information Tab

Award Number (Base): 100923
- Award Number: 100923
- Status: obligated

Summary Information

<table>
<thead>
<tr>
<th>EPD Number</th>
<th>Proposal Status</th>
<th>IP Number</th>
<th>IP Status</th>
<th>UCSD Award Number - Base</th>
<th>Award Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>30001795</td>
<td>Submitted</td>
<td>20162508</td>
<td>Submitted</td>
<td>100928</td>
<td>obligated</td>
</tr>
</tbody>
</table>

Award Information

<table>
<thead>
<tr>
<th>Award Number</th>
<th>Award Type</th>
<th>Principal Investigator</th>
<th>Award Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>100923</td>
<td></td>
<td></td>
<td>obligated</td>
</tr>
</tbody>
</table>

Institutes

<table>
<thead>
<tr>
<th>Award Number</th>
<th>PI Name</th>
<th>PI Email</th>
</tr>
</thead>
<tbody>
<tr>
<td>100923</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
This view will show information for the Award record. See the section, *Award Record Hierarchy Structure*, for information about the UCSD award setup process and how the award tab is structured.

The *Summary Information* table displays the corresponding IDs for the EPD module and the Institute Proposal module, if any exist for the searched parameter.

### Award Record Hierarchy Structure

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 is used for initial set up and to hold summary information; Tier 2 is used to house funding information; and Tier 3 to house year 1 dollars followed by continuations, amendments, no cost extensions, de-obligations, supplements, administrative amendments and renewals.

Tier 1, or the project history tier (also known as the “root” award) will represent the total project history for the award. Tier 2, or the fund tier, will represent a project period for a single or multi-year project. Tier 3, or the budget period tier, contains individual budget period information for the corresponding fund. If an award needs to have a new fund associated with it (i.e. due to sponsor changes), a new Tier 2 level will be added to the hierarchy. New Tier 3 budget periods can then be added to the appropriate fund level.

Although one award may have many award records associated with it in the system (minimum of three unique records, one per tier), the system identifies them all as being part of the same award because each record will share the same 6-digit base number in their IDs. For example, if a new award record is created with base 123456, the first Tier will be designated in the system as 123456-001. When a new fund is assigned to the award, it will be stored in the system as 123456-002. Assuming that this is a 3 year award, the first year’s transaction information will be added to the Tier 3 record as 123456-003. When the second year is recorded, a new Tier 3 transaction will be added as 123456-004. Assuming that in the 3rd year a new fund needed to be set up for the award, a new Tier 2 record, 123456-005, would be created. Then, the 3rd fiscal year’s transaction information can be added under this fund as 123456-006.

Thus, the 3-tiered hierarchy in the example above can be represented as follows:

- 123456-001 *(Tier 1 – summary level)*
  - 123456-002 *(Tier 2 – fund level)*
    - 123456-003 *(Tier 3 – transaction level)*
    - 123456-004 *(Tier 3 – transaction level)*
  - 123456-005 *(Tier 2 – fund level)*
    - 123456-006 *(Tier 3 – transaction level)*
The award information tab of the report shows information for all tiers of an award as follows:

- **Information for the overall award (Tier 1)** is shown in the first block of the award tab.

  ![Summary Level Information (Tier 1)](image)

- **Detailed information for each award transaction** is shown in the tabular section of the award tab.

  ![Detailed Information Tab](image)

**Searching for Records**

When the report is loaded on the screen, the user will see two required filter options on the left-hand section of the report. The first text box allows a user to enter an EPD number, Institute Proposal number, or an Award number. The second required parameter asks the user to select the module to search in for the number entered in the text box.

![Filter Options](image)
Searching for an EPD number

To find information for an EPD number and any related institute proposal information or award information, you can start by searching for an EPD number.

**Procedure**

1. Type in an EPD number into the *EPD, Institute Proposal, or Award Number* text box
   a. Note – you do not need to enter in any leading zeros
   b. Example: EPD number 00001795 could be entered in as **1795**

2. From the *In Module* option, select **EPD**

3. Click the *Search* button

4. If you entered a valid EPD number, you will see data in the *Summary Information* table of whichever tab you are on. You will also see the corresponding IDs for the other modules if any exist (highlighted below).

5. To see EPD information, click on the *EPD Information* tab
Searching for an Institute Proposal number

To find information for an Institute Proposal number and any related EPD information or award information, you can start by searching for an Institute Proposal number.

Procedure

1. Type in an Institute Proposal number into the EPD, Institute Proposal, or Award Number text box
   a. Example: Institute Proposal number 20162508 should be entered in as **20162508**

2. From the In Module option, select Institute Proposal

3. Click Search

4. If you entered a valid Institute Proposal number, you will see data in the Summary Information table of whichever tab you are on. You will also see the corresponding IDs for the other modules if any exist (highlighted below).

5. To see Institute Proposal information, click on the Institute Proposal Information tab
Searching for an Award number

To find information for a UCSD Award number and any related EPD information or Institute Proposal information, you can start by searching for an Award number.

Procedure

1. Type in a UCSD Award number into the EPD, Institute Proposal, or Award Number text box
   a. Example: UCSD Award number 100928-001 should be entered in as 100928-001

2. From the In Module option, select Award

3. Click Search

4. If you entered a valid UCSD Award number, you will see data in the Summary Information table of whichever tab you are on. You will also see the corresponding IDs for the other modules if any exist (highlighted below).

5. To see award information, click on the Award Information tab

Clearing Filters

This report allows you to clear all filter options you may have selected. To reset the report, click the Clear Filters button.