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- Withdrawn from UC San Diego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

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>Academic Year Effort</th>
<th>IP Number</th>
<th>Proposal Investigator</th>
<th>Proposal Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Budget Cost Sharing</td>
<td>Lead Unit</td>
<td>Proposal Investigator</td>
<td>SIO Science Code</td>
</tr>
<tr>
<td>Amount</td>
<td></td>
<td>Employee ID</td>
<td>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</td>
<td>OP Reporting Date</td>
<td>Proposal Investigator</td>
<td>Home Unit Code</td>
</tr>
<tr>
<td>Cost</td>
<td></td>
<td>Home Unit</td>
<td></td>
</tr>
<tr>
<td>Budget Total Indirect</td>
<td>Org Code</td>
<td>Proposal Investigator</td>
<td>SIO Funding Source Code</td>
</tr>
<tr>
<td>Cost</td>
<td></td>
<td>VC Unit Name</td>
<td></td>
</tr>
<tr>
<td>Calendar Year Effort</td>
<td>Org Code Title</td>
<td>Proposal Investigator</td>
<td>Sponsor Code</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Role</td>
<td></td>
</tr>
<tr>
<td>Created By</td>
<td>Percent Effort</td>
<td>Proposal Requested</td>
<td>Sponsor Name</td>
</tr>
<tr>
<td></td>
<td></td>
<td>End Date</td>
<td></td>
</tr>
<tr>
<td>Created By Employee</td>
<td>Prime Sponsor Code</td>
<td>Proposal Requested</td>
<td>Summer Effort</td>
</tr>
<tr>
<td>ID</td>
<td></td>
<td>Start Date</td>
<td></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 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:
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 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 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 eRAP Reports Blink site: 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 Pending Support – Selected PIs report

3. Once the report opens, select either the Home or Return icons located on the top right of the report window.

4. Once outside the report, click on the My Folders tab

5. 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 😊
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://act.ucsd.edu/ibmcognos
2. Enter your Active Directory username and password to log in
3. Click OK
4. You should now see the Cognos Home screen:

   ![Cognos Home Screen]

5. Click on the My home icon

   ![My Content]

6. Click on the Public Reports folder
7. Click on the Research Administration folder
8. Locate Pending Support – Selected PIs report
9. Click on the report name’s link to run the report

   ![Pending Support - Selected PIs]

10. The report’s filter options are now displayed on the screen
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.

This report has the following filter selections to choose from:

a. Lead Unit – This report is filterable by Lead Unit. Selecting/Deselecting 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).

b. Investigator - This report is filterable by Investigator name. Selecting/Deselecting an investigator (or multiple investigators) from the Investigator filter option will update the
items displayed in the report to only show those proposal records whose Investigator Name matches the selected filter value(s).

c. **Investigator Home Unit** – This report is filterable by investigator’s home unit. Selecting/Deselecting an investigator’s home unit (or multiple investigator home units) from the *Investigator Home Unit* filter option will update the items displayed in the report to only show those proposal records whose Investigator Home Unit matches the selected filter value(s).

d. **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).

e. **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).

f. **Investigator Role** – This report is filterable by investigator role, either PI or I. Selecting an investigator role from the *Report Filter* options will update the items displayed in the report to only show those proposal records whose Investigator Role matches the selected filter value.

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* 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.

![Report Filter Parameters](image)

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.
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 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 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

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.
- This chart is accompanied by a Tabular Display of the chart’s data to make it easy to see all values side by side. The tabular display shows the proposal number, the proposal investigator and the deadline date for each value displayed on the bar chart.
- 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.

Proposal Budget By Investigator Lead Unit & Role

- 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.
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.

Proposal Budget by Sponsor

- 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.
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

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

![Selected Units button](image)

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 View in Excel 2007 Format will copy the report data to Excel.

**Procedure**

1. Click the drop down arrow of the View Report icon on the top right corner of the report

2. Select View in Excel Options → View in Excel 2007 Format

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**

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 *Keep this version* drop down, select *Save 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 originally opened report.
9. To retrieve the saved copy, click on the *Return or Home* icons, located on the top right of the report window
10. Once outside the report, click on the My Folders tab

11. Locate your saved Report View from the list and click on the Set Properties icon to the right of the report name

12. From the Set Properties window, click on the Report View tab

13. From the Default Action drop down list, select Run the Report and click OK. You only need to do this step once – the first time you create the report view.

This setting 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.
14. After clicking OK, you will be returned to your My Folders list
15. To run your report, locate it from the list and click on its name.

Note that the report will still take you to the Report Filter Parameters page, but your previous selections have been saved. Therefore, you can just click Search to proceed with your saved filter values.

16. 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:
   a. For IE
      i. Open the report by clicking on its name in your My Folders list
      ii. With the report open, from the browser’s Favorites tab, select Add to Favorites
         
   iii. Name the link something meaningful and add it to your favorites
iv. The report will now be accessible via your favorites menu.