

Proposal and Award Lookup Tool

Table of Contents

Overview	3
Purpose	3
Report Security	3
Report Access.....	3
Accessing the Report via the Reporting Blink Page	3
Report Features	4
Report Tabs.....	4
EPD Information Tab.....	5
Institute Proposal Information Tab.....	6
Award Information Tab.....	6
Searching for Records	8
Searching for an EPD number	9
Searching for an Institute Proposal number.....	10
Searching for an Award number	11
Clearing Filters	11

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>
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:

A screenshot of a web application interface. At the top, there are three tabs: 'EPD Information', 'Institute Proposal Information', and 'Award Information'. Below the tabs is a header area with the UC San Diego logo and the text 'ELECTRONIC RESEARCH ADMINISTRATION PROGRAM'. The main content area is titled 'Proposal and Award Lookup Tool'. It contains a search form with the following elements:

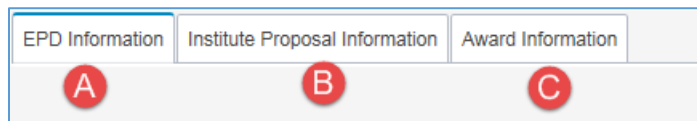
- A label 'EPD, Institute Proposal, or Award Number:' followed by a text input field.
- A label 'In Module:' followed by a radio button group with three options: 'EPD', 'Institute Proposal', and 'Award'.
- 'Clear Filters' and 'Search' buttons at the bottom.

To the right of the search form is a section titled 'Selected Filter Values' with two columns: 'Searched for:' and 'In Module:'. Below this section is the text 'Add filter criteria to view data.'

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

The screenshot displays the 'EPD Information' tab selected. On the left, there is a search filter section with 'EPD, Institute Proposal, or Award Number' set to 1795 and 'In Module' set to EPD. The main content area shows 'Selected Filter Values' and a 'Summary Information' table. The table lists the EPD Number (00001795), Proposal Status (Submitted), IP Number (20162508), IP Status (Submitted), UCSD Award Number - Base (100928), and Award Status (Obligated). Below this, the 'EPD Information - 00001795' section provides detailed metadata including start date (7/16/16), lead unit (Nanoengineering), activity type (Basic Research), sponsor (Department Of Energy Washington, D.C.), and investigators (Nanoengineering).

- 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

Summary Information

EPD Number	Proposal Status	IP Number	IP Status	UCSD Award Number - Base	Award Status
00001795	Submitted	20162508	Submitted	100928	Obligated

Institute Proposal Information Tab

EPD Information **Institute Proposal Information** Award Information

UC San Diego
ELECTRONIC RESEARCH
ADMINISTRATION PROGRAM

Selected Filter Values

Searched for: 1795 In Module: EPD

If you have any questions regarding the information contained in the report, please contact the ERAP Helpdesk at eraphelp@ucsd.edu

Proposal and Award Lookup Tool

EPD, Institute Proposal, or Award Number: 1795

In Module: EPD Institute Proposal Award

Clear Filters Search

Summary Information

EPD Number	Proposal Status	IP Number	IP Status	UCSD Award Number - Base	Award Status
00001795	Submitted	20162508	Submitted	100928	Obligated

Institute Proposal Number - 20162508

IP Number	Title	Status
20162508		Submitted

Requested Start Date: 7/16/16
Requested End Date: 7/15/19
Total Direct Cost: \$440,583.00
Total Indirect Cost: \$193,435.00
Total Cost: \$634,018.00

- 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

Summary information

EPD Number	Proposal Status	IP Number	IP Status	UCSD Award Number - Base	Award Status
00001795	Submitted	20162508	Submitted	100928	Obligated

Award Information Tab

EPD Information Institute Proposal Information **Award Information**

ELECTRONIC RESEARCH ADMINISTRATION PROGRAM

If you have any questions regarding the information contained in the report, please contact the ERAP Helpdesk at eraphelp@ucsd.edu

Proposal and Award Lookup Tool

EPD, Institute Proposal, or Award Number: 1795

In Module: EPD Institute Proposal Award

Clear Filters Search

Summary Information

EPD Number	Proposal Status	IP Number	IP Status	UCSD Award Number - Base	Award Status
00001795	Submitted	20162508	Submitted	100928	Obligated

Award Number (Base) - 100928

Award Number (Base)	Title	Status
100928		Obligated

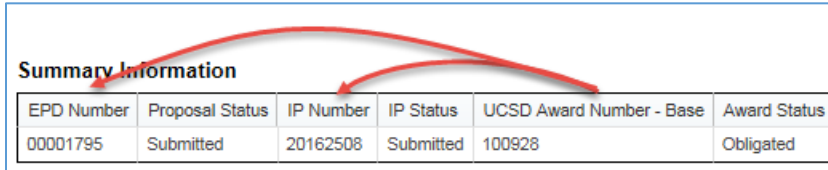
Sponsor Award Number: 100928
Start date: 9/15/09
End Date: 7/14/17
Lead Unit: Nanoengineering (000286)
Activity Type: Basic Research
Award Type: Grant
Sponsor: DEPARTMENT OF ENERGY WASHINGTON, D.C.
Award Code: 5090
Prime Sponsor Code:
Units: Nanoengineering (000286)

Total Obligated Amount	Total Pending Amount	Total Anticipated Amount	Obligated Direct	Pending Direct	Anticipated Direct	Obligated Indirect	Pending Indirect	Anticipated Indirect
\$1,296,288.00	\$0.00	\$1,296,288.00	\$922,132.00	\$0.00	\$922,132.00	\$364,156.00	\$0.00	\$364,156.00

Investigators

UCSD Parent Award Number	Award Number Tier 3	Award Fund Number	Award IP Number	Sponsor Award Number Tier 3	Award Transaction Type	Award Budget Period Start Date	Award Budget Period End Date	Award Direct Cost	Award Indirect Cost	Award Total Cost	Award Status
100928-001								\$922,132.00	\$364,156.00	\$1,286,288.00	Obligated
100928-002						9/15/09	7/14/17	\$922,132.00	\$364,156.00	\$1,286,288.00	Obligated
100928-003	25548A		20100227		New	9/15/09	9/14/10	\$201,161.00	\$46,639.00	\$247,800.00	Obligated
100928-004	25548A		20104136		Continuation Amendment	9/15/09	9/14/11	\$64,725.00	\$35,275.00	\$100,000.00	Obligated
100928-005	25548A		20104136		Supplement Amendment	9/15/10	9/14/11	\$42,701.00	\$12,609.00	\$55,310.00	Obligated
100928-006	25548A		20104136		Continuation Amendment	9/15/10	9/14/12	\$109,842.00	\$48,136.00	\$157,978.00	Obligated
100928-007	25548A		20121902		Renewal Amendment	9/15/10	9/14/13	\$126,623.00	\$53,377.00	\$180,000.00	Obligated
100928-008	25548A		20121902		Continuation Amendment	9/15/10	7/14/14	\$122,922.00	\$57,076.00	\$180,000.00	Obligated
100928-009	25548A		20121902		Continuation Amendment	9/15/10	7/14/15	\$124,620.00	\$55,372.00	\$180,000.00	Obligated
100928-010	25548A		20121902		No Cost Extension Amendment	9/15/10	7/14/16	\$0.00	\$0.00	\$0.00	Obligated
100928-011	25548A		20162508		Renewal Amendment	9/15/10	7/14/17	\$128,520.00	\$56,470.00	\$185,000.00	Obligated

- 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



Summary Information					
EPD Number	Proposal Status	IP Number	IP Status	UCSD Award Number - Base	Award Status
00001795	Submitted	20162508	Submitted	100928	Obligated

[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)					
Award Number (Base) - 100928					
Award Number (Base)	100928	Status	Obligated		
Title	[REDACTED]				
Sponsor Award Number	[REDACTED]	End Date	7/14/17		
Start date	9/15/09	Principal Investigator	[REDACTED]		
Lead Unit	Nanoengineering (000286)	Award Type	IGrant		
Activity Type	Basic Research	Sponsor Code	5090		
Sponsor	DEPARTMENT OF ENERGY WASHINGTON, D.C.		Prime Sponsor Code		
Prime Sponsor					
Total Obligated Amount	\$1,286,288.00	Obligated Direct	\$922,132.00	Obligated Indirect	\$364,156.00
Total Pending Amount	\$0.00	Pending Direct	\$0.00	Pending Indirect	\$0.00
Total Anticipated Amount	\$1,286,288.00	Anticipated Direct	\$922,132.00	Anticipated Indirect	\$364,156.00
Investigators	overall award dollars to date			Units	Nanoengineering (000286)

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

UCSD Parent Award Number	Award Number Tier 3	Award Fund Number	Award IP Number	Sponsor Award Number Tier 3	Award Transaction Type	Award Budget Period Start Date	Award Budget Period End Date	Award Direct Cost	Award Indirect Cost	Award Total Cost	Award Status
100928-001	Tier 1 (summary)							\$922,132.00	\$364,156.00	\$1,286,288.00	
100928-002	Tier 2 (fund level)							\$922,132.00	\$364,156.00	\$1,286,288.00	
100928-003	25548A	20100227	[REDACTED]	[REDACTED]	New	9/15/09	9/14/10	\$201,161.00	\$45,838.00	\$247,000.00	Obligated
100928-004	25548A	20104336	[REDACTED]	[REDACTED]	Continuation Amendment	9/15/09	9/14/11	\$64,725.00	\$35,275.00	\$100,000.00	Obligated
100928-005	25548A	20104336	[REDACTED]	[REDACTED]	Supplement Amendment	9/15/10	9/14/11	\$42,701.00	\$12,609.00	\$55,310.00	Obligated
100928-006	25548A	20104336	[REDACTED]	[REDACTED]	Supplement Amendment	9/15/10	9/14/11	\$46,136.00	\$0.00	\$157,976.00	Obligated
100928-007	25548A	20104336	[REDACTED]	[REDACTED]	Supplement Amendment	9/15/10	9/14/11	\$53,377.00	\$0.00	\$160,000.00	Obligated
100928-008	25548A	20121932	[REDACTED]	[REDACTED]	Continuation Amendment	9/15/10	7/14/14	\$125,922.00	\$67,078.00	\$190,000.00	Obligated
100928-009	25548A	20121932	[REDACTED]	[REDACTED]	Continuation Amendment	9/15/10	7/14/15	\$124,620.00	\$65,372.00	\$190,000.00	Obligated
100928-010	25548A	20121932	[REDACTED]	[REDACTED]	No Cost Extension Amendment	9/15/10	7/14/16	\$0.00	\$0.00	\$0.00	Obligated
100928-011	25548A	20162506	[REDACTED]	[REDACTED]	Renewal Amendment	9/15/10	7/14/17	\$129,530.00	\$66,470.00	\$196,000.00	Obligated

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.

EPD, Institute Proposal, or Award Number:

* 1

In Module:

* EPD 2

Institute Proposal

Award

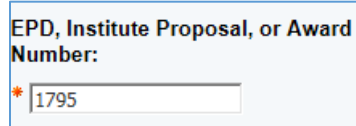
Clear Filters 3

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.

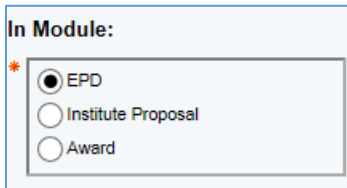
Procedure

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**



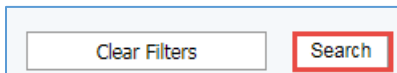
A screenshot of a search input field. The label above the field is "EPD, Institute Proposal, or Award Number:". The field contains the text "1795" and has a red asterisk icon to its left.

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



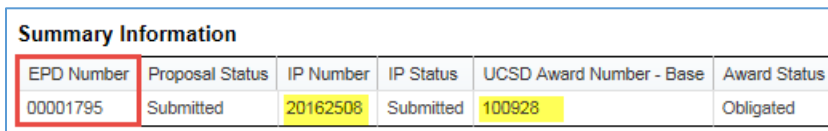
A screenshot of the "In Module:" selection options. It features three radio buttons: "EPD" (which is selected), "Institute Proposal", and "Award". A red asterisk icon is located to the left of the radio buttons.

3. Click the *Search* button



A screenshot of two buttons: "Clear Filters" and "Search". The "Search" button is highlighted with a red border.

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).



A screenshot of a table titled "Summary Information". The table has six columns: "EPD Number", "Proposal Status", "IP Number", "IP Status", "UCSD Award Number - Base", and "Award Status". The first row contains the values "00001795", "Submitted", "20162508", "Submitted", "100928", and "Obligated". The "EPD Number" and "UCSD Award Number - Base" cells are highlighted with a yellow background.

EPD Number	Proposal Status	IP Number	IP Status	UCSD Award Number - Base	Award Status
00001795	Submitted	20162508	Submitted	100928	Obligated

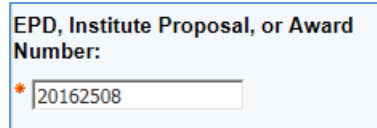
5. To see EPD information, click on the *EPD Information* tab

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.

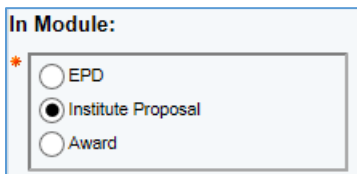
Procedure

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**



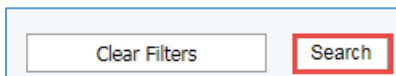
A screenshot of a search input field. The label above the field is "EPD, Institute Proposal, or Award Number:". The field contains the text "20162508". There is a small asterisk icon to the left of the input field.

2. From the *In Module* option, select *Institute Proposal*



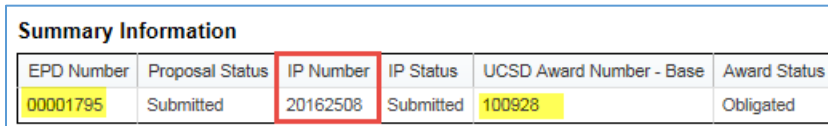
A screenshot of the "In Module:" selection options. It shows three radio buttons: "EPD", "Institute Proposal", and "Award". The "Institute Proposal" option is selected, indicated by a filled circle next to it. There is a small asterisk icon to the left of the selection area.

3. Click *Search*



A screenshot of two buttons: "Clear Filters" and "Search". The "Search" button is highlighted with a red border.

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).



A screenshot of a table titled "Summary Information". The table has six columns: "EPD Number", "Proposal Status", "IP Number", "IP Status", "UCSD Award Number - Base", and "Award Status". The "EPD Number" cell contains "00001795", the "IP Number" cell contains "20162508", and the "UCSD Award Number - Base" cell contains "100928". The "IP Number" and "UCSD Award Number - Base" cells are highlighted in yellow.

EPD Number	Proposal Status	IP Number	IP Status	UCSD Award Number - Base	Award Status
00001795	Submitted	20162508	Submitted	100928	Obligated

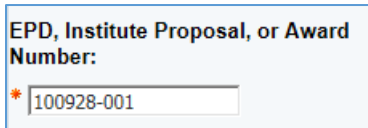
5. To see Institute Proposal information, click on the *Institute Proposal Information* tab

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

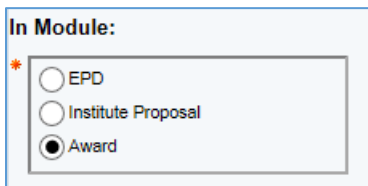
1. Type in a UCSD Award number into the *EPD, Institute Proposal, or Award Number* text box
 - a. Example: UCSD Award number 100928-001 should be entered in as **100928-001**



EPD, Institute Proposal, or Award Number:

* 100928-001

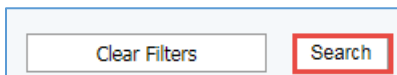
2. From the *In Module* option, select *Award*



In Module:

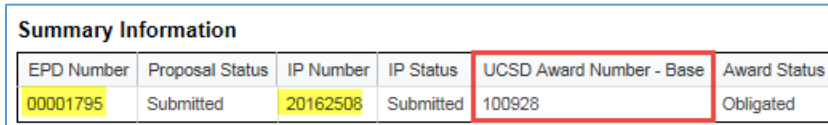
* EPD
 Institute Proposal
 Award

3. Click *Search*



Clear Filters 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).

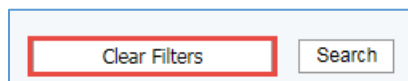


EPD Number	Proposal Status	IP Number	IP Status	UCSD Award Number - Base	Award Status
00001795	Submitted	20162508	Submitted	100928	Obligated

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.



Clear Filters Search