

Introduction

Process and Trigger

Execute this report to view details of the award activity (new, renewal, continuation, incremental, or supplemental funding) that has taken place during a specified period by investigator, funds center, funds center group, school, campus, or sponsor. Grants can also be searched by award status and/or award type.

Note: This report displays data aggregated at the SAP Grant level. To see award activity broken out by individual sponsored programs, please use the Award Activity – Sponsored Program report.

Prerequisites

- [Introduction to BW Reporting at Boston University](#) (video)
- [Working with BW Reporting](#) (video)

Menu Path

BUworks Central → Reporting → Accounting (FI) → Grants Management (Central) Reports → Award Activity – Grant Level Report

Transaction

None

Tips and Tricks

- Regardless of search values entered on the Variable Entry Screen, users will only see grant award data based on their SAP security access.
- This report provides the ability to search on Funds Center Group or Funds Center Group type. These features allow funds centers to be grouped into a hierarchy defined by a particular school or college. For more detail, refer to [Specifying a Funds Center Group](#).
- The current Business Warehouse limit for text fields is 60 characters. For cases in which titles are longer than the **Award Title** field, the title is segmented and assigned to the fields **Award Title 2, 3, and 4**. Users can view the complete title by adding these free characteristics into the report.
- In order to search by PI or Co-PI name, you should use the matchcode box and follow the instructions in the help document [BW How to - Use the Matchcode or Search Box](#).
- **Fiscal Period/Year** refers to the fiscal month and year, not the calendar month and year. This field is initially populated in the Variable Entry screen with the current fiscal year through the month prior to the month in which the report is being run. However, this can be modified by users who wish to search in a different period or set of periods.
- Please note that OSP only began entering specific budget period information in KCRM at the end of February, when an enhancement was added to the system to allow the capture of this data. Prior to that, KCRM captured only obligation start and end dates, which can span more than one budget period. In the report, when there are no budget period dates to display, obligation dates will display instead.
- It is possible to use the **Variable Screen** button to return to the Variable Entry panel in order to specify new parameters and re-run the report. Keep in mind, though, that any modifications to the report made prior to using this button – columns moved or filters applied, for example - will still be in effect when the report is re-run. In addition, when returning to the Variable Entry panel via the Variable Screen button, the Funds Center and Funds Center Group variables will no longer be available.

- All proposals submitted through funds centers beginning with a 255* prefix, the amounts displayed in these key figures are halved to reflect the fact that clinical costs are shared with Boston Medical Center.
- Instructions calling for a mouse right-click can be executed on a Macintosh computer with a one-button mouse by holding down the **CTRL** key while clicking.

How-to guides useful when executing a BW report

- [BW How to Run - Award Activity – Sponsored Program \(Central\) report](#)
- [BW How to - Use the Matchcode or Search Box](#)
- [How to - Specify Report Dates](#)
- [How to Save and Use a View](#)
- [How to Filter Report Data](#)
- [How to Add a Result-Subtotal Line](#)
- [How to Export BW Report Data to Excel](#)
- [How to Save and Use a Variant](#)

Procedure

Executing the Report

1. Click on the Portal link to start the report. The *Variable Entry* screen is displayed.
2. Enter selection criteria via the *Variable Entry* screen.

The screenshot shows the 'Variable Entry' interface. At the top, there are buttons for 'Save', 'Save As...', and 'Delete'. Below this is a section titled 'General Variables' containing a table with two columns: 'Variable' and 'Current Selection'. The table lists various variables such as Fiscal Period, Campus, School, Funds Center Group, Funds Center, Sponsor, Sponsor Type, Prime Sponsor, Prime Sponsor Type, Activity Type, Award Type, Award Status, PI, Co-PI, and SAP Grant Number. Each row has a corresponding input field in the 'Current Selection' column. At the bottom left of the form are 'OK' and 'Check' buttons.

No fields are required. If you do not enter any variables, the report will return all available results based on your individual role and security settings.

Refer to [Tips and Tricks](#) for more information on specifying other variables.

Click **OK** to run the report.

Understanding the Report’s Key Figures¹

Note that for all proposals submitted through funds centers beginning with a 255* prefix, the amounts displayed in these key figures are halved to reflect the fact that clinical costs are shared with Boston Medical Center.

Key Figure	Definition	Data Source
Additional Direct Funds	New direct cost dollars authorized for spending during the selected period.	KCRM
Additional F&A Funds	New F&A cost dollars authorized for spending during the selected period.	KCRM
Additional Funds This Budget Period	New total funds authorized for spending during the current period.	KCRM

Report Characteristics

It is possible to add characteristics to, or remove characteristics from, the initial display by dragging them in or out of the report. Refer to the online help document [BW How to - Add, Remove, or Move a Column in a Report](#) for details on bringing in or removing characteristics from a report.

Characteristics Displayed in the Initial View	
Characteristic	Definition
Award Fund Center	The name and number for the funds center in which the award is set up.
SAP Grant Number	The unique identifier generated by SAP for this award. Can be viewed as a number and/or award name.
Award Title	The formal title of the award, as it appears on the Notice of Grant Award.
PI	The full name and UID of the PI(s) listed on the award
Fund Center Group	A grouping identified and maintained by the business owners or their delegates to allow reporting of award data by a combination of funds centers. For detailed information on the use of this characteristic by schools that have chosen to use it, please see BW QRG - Funds Center Group Definitions .
PI Home Fund Center	The number and name of the Fund Center through which the PI is paid.
Sponsor	Sponsor (direct sponsor) listed on the Notice of Grant Award
Sponsor Type	Corresponding sponsor type for sponsor (direct sponsor) listed on the Notice of Grant Award; for example, Federal, Foundation/Association/Society, Industry.
Prime Sponsor	If applicable, the prime (originating) sponsor.
Prime Sponsor Type	If applicable, the corresponding sponsor type for the prime (originating) sponsor.

¹ Key Figures are concrete, measurable quantities that are objects of business analysis and are described by characteristics within the report.

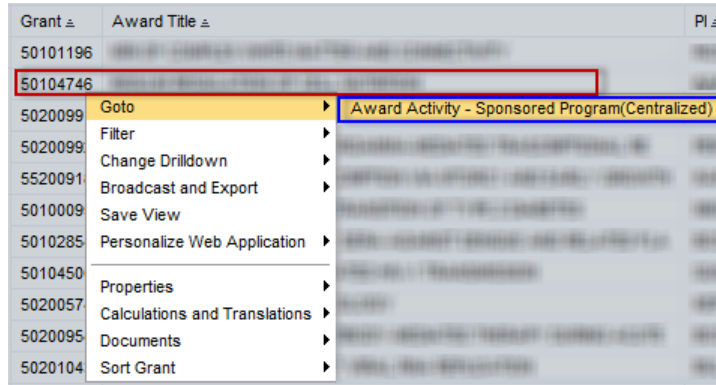
Characteristics Displayed in the Initial View	
Award Type	The type of funding instrument used by the sponsor; for example, grant, contract, etc.
Activity Type	The type of activity supported by the award; for example, research, training, other sponsored activity.
KC Entry Date	The date this award action was recorded in KCRM.
Transaction Type	Transaction type associated with the current action; for example, new, continuation, supplement.
Budget Start Date	The start date of the specific budget period associated with the award activity.
Budget End date	The end date of the specific budget period associated with the award activity.
Project Start Date	The start date of the award (competing segment), including any pre-award authorization period.
Project End Date	The end date of the award (competing segment), defined as the current budget period plus any unfunded periods, including possible option years, unless the submission of a proposal is required to trigger the option years.

Free Characteristics	
Characteristic	Definition
Award Status	The status of the award; for example, Approved Award, Pre-Close, Closed.
Award Title 2, 3, 4	The current Business Warehouse limit for text fields is 60 characters. For cases in which award titles are longer than the Award Title field, the title is segmented and assigned to the fields Award Title 2, 3, and 4.
Campus	The campus with which the award funds center is associated (CRC, MED, NEIDL).
Co-PI	The full name of the CO-PI(s) listed on the award
Co-PI E-Mail Address	The e-mail address of the Co-PI(s) listed on the award.
Co-PI Home Funds Center	The number and name of the Fund Center through which the Co-PI is paid
Fiscal Period/Year	The fiscal period in which the KC Entry Date occurred.
Funds Center Group Type	An additional grouping attribute associated with each fund center, defined by the business owners and maintained by the business owners or their delegates. For detailed information on the use of this characteristic by schools that have chosen to use it, please see BW QRG - Funds Center Group Definitions .
PI Email Address	Email address of the PI(s).
Prime Sponsor Award Number	Identifier assigned to this award by the prime (originating) sponsor.
School	The school or college with which the award funds center is associated.
Secondary Award Fund Center	If applicable, the name and number of an additional fund center associated with the award.
Sponsor Award Number	Identifier assigned to this award by the sponsor (direct sponsor).

Drilling Down to Additional Detail in the Award Activity - Sponsored Program Report

It is possible to drill-down from a grant in the **Award Activity – Grant (Centralized)** report to display detail for any Sponsored Programs associated with the grant. Information about the drill-to report is available in the online help document [BW How to Run - Award Activity – Sponsored Program \(Central\) report](#).

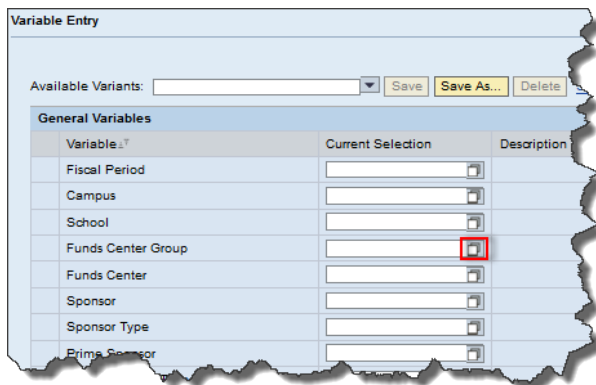
Drill-down Example



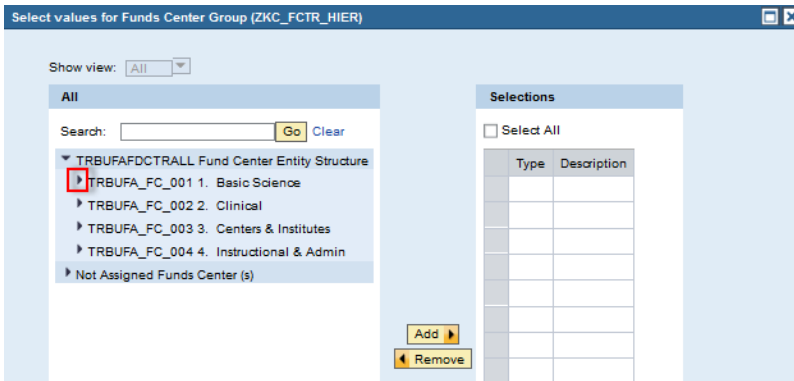
1. Position the cursor on a **Grant** number or **Award Title**.
2. Right-click on that cell to display the **context** menu.
3. Release the mouse button and slide the cursor down to **Goto**.
4. Click on **Award Activity – Sponsored Program (Centralized)**.

Specifying a Funds Center Group

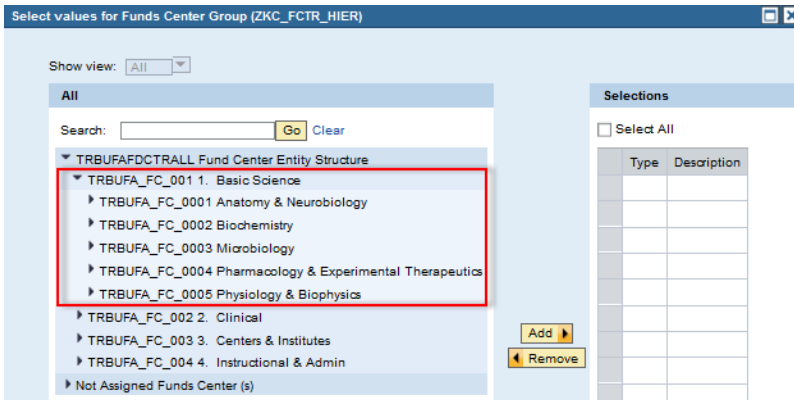
Funds Center Groups and **Group Types** are presented in a hierarchical format. Groups and group types are defined and maintained by individual schools and colleges (at present, the Funds Center Hierarchy is currently in use only by the School of Medicine. For definitions specific to BUSM's use of the hierarchy, refer to [BW QRG - Funds Center Group Definitions](#)). The highest level in the hierarchy represented on the variable entry screen defines the group type. The second level defines the group. Users can search by any combination of group type, group, or individual funds centers within groups for maximum flexibility.



1. Click the **Funds Center Group** matchcode box.



- To select an entire group like *Basic Science* or *Centers & Institutes*, click anywhere on the line that contains the group name. To select one of the elements within a group, click on the hierarchy icon (the triangle) to the left of the group to display the group elements. Once the hierarchy is expanded, click on one of the elements to select it.



- Once a group or group element has been selected, click the **Add** button.

Note: to select several elements, repeat steps 2 and 3.

- Click **OK** to return to the Variable Entry screen.

Results and Next Steps

None