

Introduction

Process and Trigger

Execute this report to compare the number and associated dollar amounts of proposals submitted and awards received during two fiscal periods.

Note: This report displays data aggregated at the SAP Grant level.

Prerequisites

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

Menu Path

Distributed Users: BUworks Central → Reporting → Accounting (FI) → Grants Management (Distributed) Reports → Multi-period Comparison Report

Central Users: BUworks Central → Reporting → Accounting (FI) → Grants Management (Central) Reports → Multi-period Comparison 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. Please note: security access is driven by award permissions in SAP. If you do not have access to view at least one award in a particular funds center, you will not be able to view proposal data for that funds center.
- 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](#).
- 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 previous and current fiscal years 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.
- **Current** and **Previous Fiscal Period/Year** can be specified as single periods or period ranges. Furthermore, the form of the dates specified does not have to match. For example, a single period can be compared against a range of periods.
- The proposal and award data displayed on the same row in this report is not linked; i.e., the awards displayed are not those made in response to the proposals displayed on the same line. The data reflect the fact that the proposals were submitted within the period queried and the awards were received within the period queried for that funds center, PI, sponsor, etc. To view data on the relationship between proposals and awards, please see the [Proposal to Funded Award](#) report.
- The **Additional Funds This Budget Period** columns reflect the new funds added within the fiscal period queried.
- It is possible to see the detail behind these high-level counts and dollar amounts by using the *Go-To* functionality to navigate to the *Proposal Activity* report or the *Award Activity – Grant Level* report. Refer to the section [Drilling Down to Additional Detail](#) below for additional information on how to use this feature.

- 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/awards 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 \(Distributed\) 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.

General Variables		
Variable	Current Selection	Description
* Previous Fiscal Period/Year	001/2012 - 010/2012	JUL 2012 - APR 2012
* Current Fiscal Period/Year	001/2013 - 010/2013	JUL 2013 - APR 2013
Campus		
School		
Funds Center Group		
Funds Center		
Sponsor		
Sponsor Type		
Prime Sponsor Type		
Activity Type		
Award Type		
PI		

OK Check

Two fields are required to specify the years to be compared:

- Previous Fiscal Period/Year
- Current Fiscal Period/Year

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
Proposal Count – Previous Fiscal Period	Count of the proposals submitted during the selected period (prior period).	KCRM
Proposal Initial Year Total Amount – Previous Fiscal Period	Sum of the total costs requested for the initial proposed period of all the proposals submitted during the selected period (prior period).	KCRM
Proposal Project Total – Previous Fiscal Period Amount	Sum of the total costs requested for the entire proposed period of all the proposals submitted during the selected period (prior period).	KCRM
Proposal Count – Current Fiscal Period	Count of the proposals submitted during the selected period (current period).	KCRM
Proposal Initial Year Total Amount – Current Fiscal Period	Sum of the total costs requested for the initial proposed period of all the proposals submitted during the selected period (current period).	KCRM
Proposal Project Total – Current Fiscal Period Amount	Sum of the total costs requested for the entire proposed period of all the proposals submitted during the selected period (current period).	KCRM
Change in Proposal \$ Initial Year Amount	Difference between Period 1 and Period 2 Initial Year Proposal dollars	Calculation
Change in Proposal \$ Project Amount	Difference between Period 1 and Period 2 Proposal Project dollars	Calculation
Change in Proposal % Initial Year Amount	Percentage change between Period 1 and Period 2 Initial Year Proposal dollars	Calculation
Change in Proposal % Project Amount	Percentage change between Period 1 and Period 2 Proposal Project dollars	Calculation
Award Count – Previous Fiscal Period	Count of the new, renewal, supplemental, continuation, or incremental awards received during the selected period.	KCRM
Additional Funds This Budget – Previous Fiscal Period	Sum of the additional funds authorized for spending during the period queried.	KCRM
Award Count – Current Fiscal Period	Count of the new, renewal, supplemental, continuation, or incremental awards received during the selected period.	KCRM
Additional Funds This Budget – Current Fiscal Period	Sum of the additional funds authorized for spending during the period queried.	KCRM
Change in Award \$ Additional Funds	Difference between additional funds authorized for spending between Period 1 and Period.	Calculation
Change in Award %	Percentage change representing the difference between	Calculation

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

Key Figure	Definition	Data Source
Additional Funds	additional funds authorized for spending in Period 1 and Period 2.	

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
Funds Center	The name and number for the funds center through which the displayed proposals were submitted and in which the displayed awards are set up.

Free Characteristics	
Characteristic	Definition
Activity Type	The type of activity proposed or supported by the award; for example, research, training, other sponsored activity.
Award Type	The type of funding instrument used by the sponsor; for example, grant, contract, etc.
Campus	The campus with which the proposal or award funds center is associated (CRC, MED, NEIDL).
Fiscal Period/Year	The fiscal period in which either the KC institutional proposal record was created or the KC Award Entry Date occurred.
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 .
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 .
Non-Employee Proposal PI	If the PI is not an employee of Boston University at the time of proposal submission, the full name of the PI listed on the proposal.
PI	The full name and UID of the PI(s) listed on the proposal or award.
PI Home Funds Center	The number and name of the Fund Center through which the PI is paid.
Prime Sponsor	If applicable, the prime (originating) sponsor.
Prime Sponsor Type	If applicable, the corresponding sponsor type for the prime (originating) sponsor.
Proposal Status	The status of the proposal with regard to the sponsor's review; for example, pending, funded, withdrawn.
Proposal Type	The type of proposal submitted; for example, new, renewal, continuation.
School	The school or college with which the proposal or award funds center is associated.

Free Characteristics	
Secondary Award Funds Center	If applicable, the name and number of an additional fund center associated with the award.
Secondary Proposal Funds Center	If applicable, the name and number of an additional fund center associated with the proposal.
Sponsor	Sponsor (direct sponsor) listed on the proposal or Notice of Grant Award
Sponsor Type	Corresponding sponsor type for sponsor (direct sponsor) listed on the proposal or Notice of Grant Award; for example, Federal, Foundation/Association/Society, Industry.

Drilling Down to Additional Detail in the Proposal Activity Report or Award Activity – Grant Report

It is possible to drill-down from the **Multi-period Comparison** report to display proposal or award detail. Information about the drill-to reports is available in these online help documents:

- [BW How to Run – Proposal Activity \(Distributed\) report.](#)
- [BW How to Run – Award Activity – Grant \(Distributed\) report](#)

Drill-down Example

	Proposal Count – Previous Fiscal Period	Proposal Initial Year Total Amount-Previous Fiscal Period	Proposal Project Total - Previous Fiscal Period Amount	Proposal Count – Current Fiscal Period	Pr Init To Fis
Funds Center		\$	\$		
Overall Result	12	2,674,615.00	12,626,781.00	13	

Right-click on the '12' in the 'Overall Result' row to open the context menu:

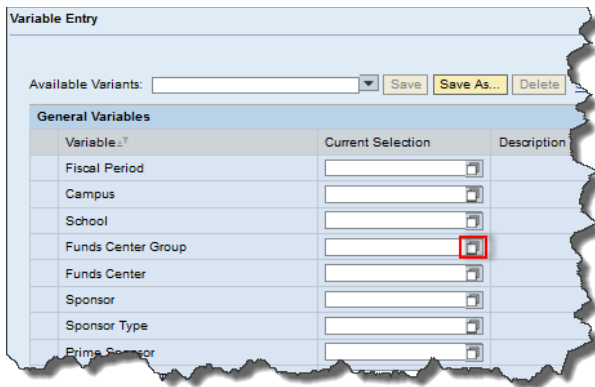
- Goto
 - Proposal Activity - Distributed
 - Award Activity – Grant (Distributed)
 - User Guide
- Change Drilldown
- Broadcast and Export
- Save View
- Personalize Web Application
- Properties
- Calculations and Translations
- Documents

1. Position the cursor on a count or dollar amount (proposal or award) and right-click to display the **context** menu.
2. Release the mouse button and slide the cursor down to **Goto**.

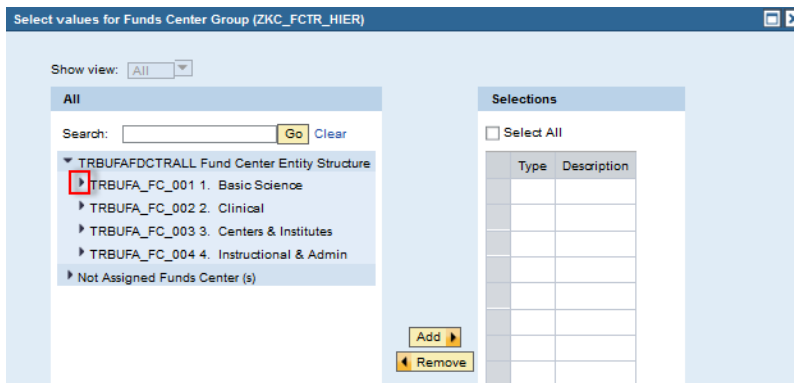
Click to select which drill-to report to execute: **Proposal Activity (Distributed)** or **Award Activity – Grant (Distributed)**.

Specifying a Funds Center Group

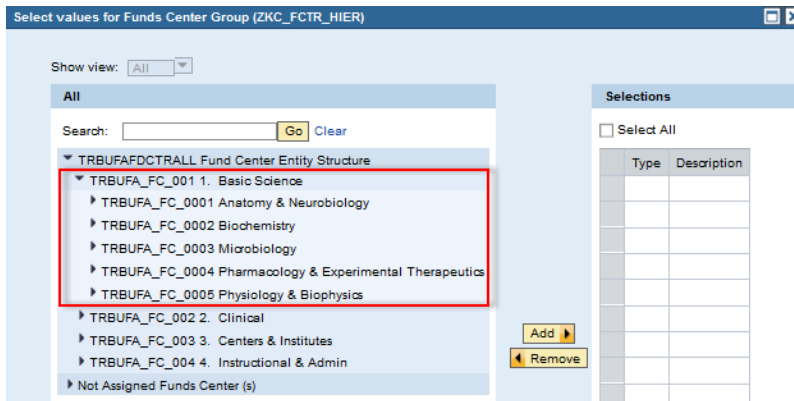
Funds Center Groups and **Group Types** are presented in a hierarchical format. Groups and group types are defined and maintained by individual schools and colleges (at present, the Funds Center Hierarchy is currently in use only by the School of Medicine. For definitions specific to BUSM’s use of the 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.



2. 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.



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

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

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

Results and Next Steps

None