Introduction

Process and Trigger

Execute this report to view details of all proposal submissions within a fiscal period or set of fiscal periods for an investigator, funds center, funds center group, school, campus, or sponsor. Proposals can also be searched by status and/or type.

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 →Proposal Activity Report

Transaction

None

Tips and Tricks

- Regardless of search values entered on the Variable Entry Screen, users will only see proposal 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.
- The current Business Warehouse limit for text fields is 60 characters. For cases in which proposal titles are longer than the Proposal Title field, the title is segmented and assigned to the fields Proposal Title 2, 3, and 4. Users can view the complete proposal title by bringing Proposal Title 2, 3 and 4 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.
- 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.
- 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 (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.**

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 Figures[1]

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.

[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
Total Project – Direct Costs	The total direct costs requested for the entire proposed project.	KCRM
Total Project - F&A	The total F&A costs requested for the entire proposed project.	KCRM
Total Project Amount	The total costs requested for the entire proposed project.	KCRM
Initial Year - Direct	The total direct costs requested for the initial period of the proposed project.	KCRM
Initial Year - F&A	The total F&A costs requested for the initial period of the proposed project	KCRM
Initial Year Total Amount	The total costs requested for the initial period of the proposed project	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.

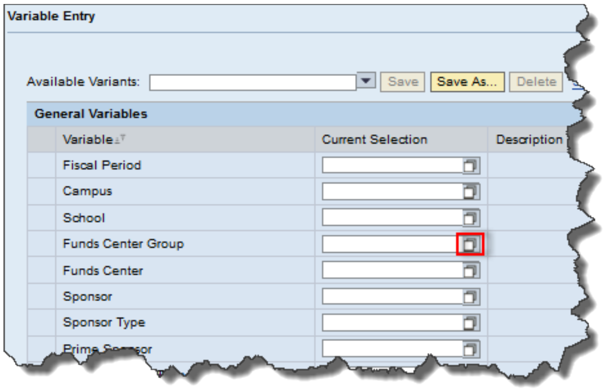
Characteristics Displayed in the Initial View	
Characteristic	**Definition**
School	The School or College with which the proposal funds center is associated.
Proposal Funds Center	The number and name of the funds center through which the proposal was submitted.
Proposal Title	Formal Title of the research project that is being proposed.
Fiscal Period/Year	Fiscal year and month associated with the creation date of the KCRM Institutional Proposal record for this proposal.
PI	The full name and UID of the PI listed on the proposal.
Funds 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 Number	The number and name of the Fund Center through which the PI listed on the proposal is paid.
Sponsor	The sponsor (direct sponsor) to which the proposal was submitted.
Sponsor Type	Corresponding sponsor type for the sponsor (direct sponsor) to which the proposal was submitted; for example, Federal, Foundation/Association/Society, Industry.
Prime Sponsor	If applicable, the prime (or originating) sponsor.
Prime Sponsor Type	If applicable, the corresponding sponsor type for the prime (or 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.

Characteristics Displayed in the Initial View	
Characteristic	**Definition**
Activity Type	The type of activity proposed; for example, research, training, other sponsored activity.
Proposal Start date	The start date of the total proposed project period.
Proposal End Date	The end date of the total proposed project period.

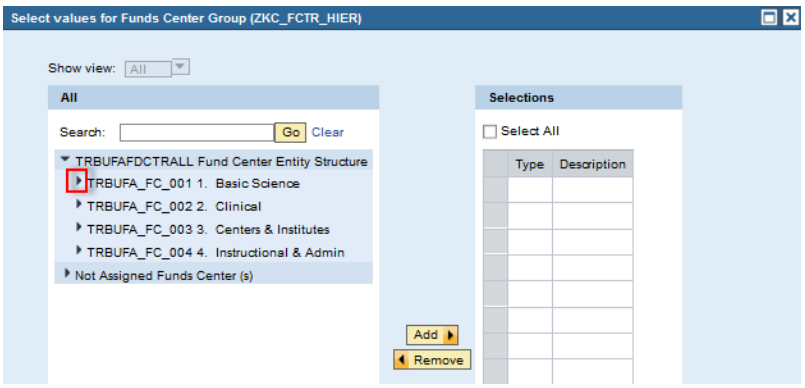
Free Characteristics	
Characteristic	**Definition**
Campus	The campus with which the proposal funds center is associated (CRC, MED, NEIDL).
Co-PI	The full name of the Co-PI listed on the proposal
Co-PI E-Mail Address	The e-mail address of the Co-PI listed on the proposal.
Co-PI Home Funds Center	The name of the Fund Center through which the Co-PI listed on the proposal is paid.
Created On	The date on which the KCRM Institutional Proposal record was created.
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.
Initial Period End Date	The end date of the initial proposed project period.
Initial Period Start Date	The start date of the initial proposed project period.
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 E-Mail Address	The e-mail address of the PI listed on the proposal.
Proposal Deadline Date	The sponsor's stated deadline for the submission of the proposal.
Proposal F&A Rate	F&A rate specified in the proposal budget.
Proposal Number	The unique proposal identifier issued by the KCRM system.
Proposal Title 2, 3, 4	The current Business Warehouse limit for text fields is 60 characters. For cases in which proposal titles are longer than the Proposal Title field, the title is segmented and assigned to the fields Proposal Title 2, 3, and 4.
Secondary Proposal Fund Center	If applicable, the name and number of an additional unit associated with the proposal.

Specifying a Funds Center Group

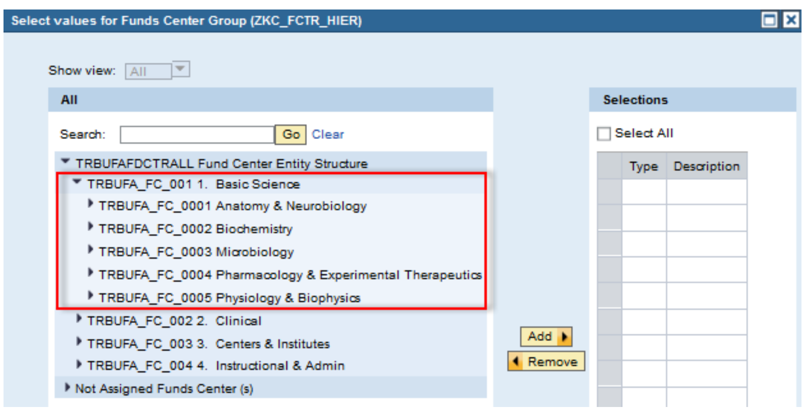
Funds Center Groups and **Group Types** are presented in a hierarchical format. Groups and group types are defined and maintained by individual schools and colleges (at present, the Funds Center Hierarchy is currently in use only by the School of Medicine. For definitions specific to BUSM's use of the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