

## Introduction

### Process and Trigger

Execute this report to obtain a summary of the number of proposals that were submitted and awards received within a given period.

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

**BUworks Central →Reporting →Accounting (FI) → Grants Management (Central) Reports →Proposal and Award Summary 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 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.
- 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 **Submitted Proposals and Funded Awards** report.
- The total anticipated amount column on this report always reflects the most recent cumulative anticipated data available as of the run date of the report. The “Additional Funds Added for Selected Periods” 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. See [Award Activity - Grant Level report \(Central\)](#) 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 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
Fiscal Period/Year	001/2013 - 010/2013	JUL 2013 - APR 2013
Campus		
School		
Funds Center Group		
Funds Center		
Sponsor		
Sponsor Type		
Prime Sponsor		
Prime Sponsor Type		
Activity Type		
Award Type		
PI		

OK Check

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<sup>1</sup>**

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	Count of the proposals submitted during the selected period.	KCRM
Proposal Initial Year Total Amount	Sum of the total costs requested for the initial proposed period of all the proposals submitted during the selected period.	KCRM
Proposal Project Total Amount	Sum of the total costs requested for the entire proposed period of all the proposals submitted during the selected period.	KCRM
Award Count	Count of the new, renewal, supplemental, continuation, or incremental awards received during the selected period.	KCRM
Additional Funds this Fiscal Period	Sum of the additional funds authorized for spending during the period queried.	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
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.

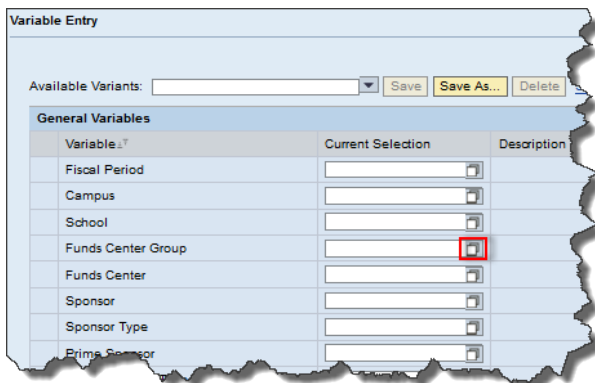
Free Characteristics	
Characteristic	Definition
Activity Type	The type of activity proposed or supported by the award; for example, research, training, other sponsored activity.
Award Type	The type of funding instrument used by the sponsor; for example, grant, contract, etc.
Campus	The campus with which 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 <a href="#">BW QRG - Funds Center Group Definitions</a> .

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

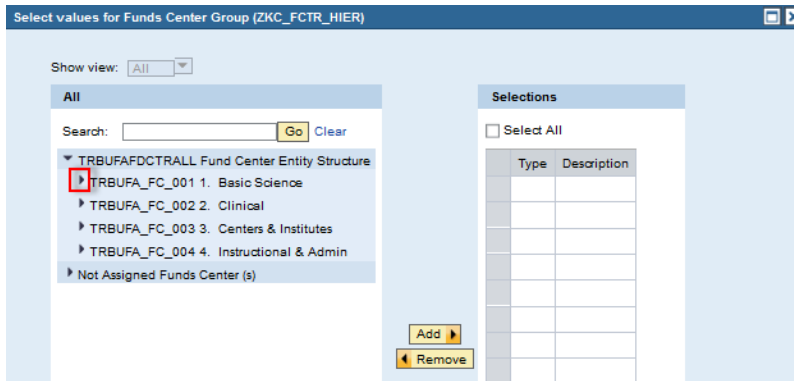
Free Characteristics	
Characteristic	Definition
Funds Center Group Type	An additional grouping attribute associated with each fund center, defined by the business owners and maintained by the business owners or their delegates. For detailed information on the use of this characteristic by schools that have chosen to use it, please see <a href="#">BW QRG - Funds Center Group Definitions</a> .
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.
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 unit associated with the proposal.
School	The school or college with which the proposal or award funds center is associated.
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.

**Specifying a Funds Center Group**

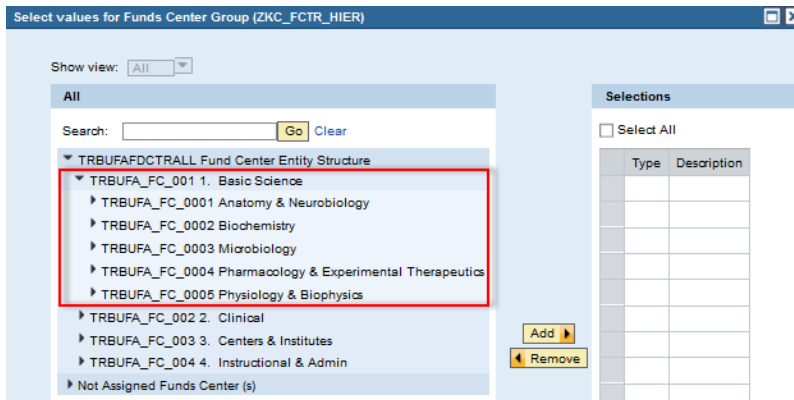
**Funds Center Groups** and **Group Types** are presented in a hierarchical format. Groups and group types are defined and maintained by individual schools and colleges (at present, the Funds Center Hierarchy is currently in use only by the School of Medicine. For definitions specific to BUSM’s use of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