

Introduction

Process and Trigger

Execute this report to obtain proposal and award data points to show the relationship between a proposal and its associated award. 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 →Submitted Proposals and Funded Awards Report

BUworks Central →Reporting →Accounting (FI) → Grants Management (Distributed) Reports →Submitted Proposals and Funded Awards Report

Transaction

None

Tips and Tricks

- Regardless of search values entered on the Variable Entry Screen, users will only see proposal and 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.
- The Variable Entry screen contains a pair of variables: **Proposal Funds Center** and **Award Funds Center**. Keep in mind that in order to view the complete portfolio for a Funds Center, it might be necessary to run two searches, one on Proposal Funds Center, and a second one on Award Funds Center. Consider these examples:
 - If **Proposal Funds Center** is specified and **Award Funds Center** is left blank, all proposals associated with the specified Funds Center will be displayed. In addition, all awards linked to those proposals will display. However, awards associated with the Funds Center that are not linked to a proposal (clinical trial awards, for example), will not display.
 - If **Award Funds Center** is specified and **Proposal Funds Center** is left blank, all awards associated with the specified Funds Center will be displayed. In addition, all proposals linked to those awards will display. However, proposals associated that the Funds Center that are not linked to an award (not funded or pending status, for example), will not display.
- The current Business Warehouse limit for text fields is 60 characters. For cases in which titles are longer than the **Award Title** or **Proposal Title** fields, the title is segmented and assigned to the fields **Award Title 2, 3, and 4** or **Proposal Title 2, 3, and 4**. Users can view the complete award or proposal title by bringing these additional 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](#).
- Proposal and award key figures are differentiated by color. Proposal data is displayed in green, and award detail is displayed in orange.
- The obligated and anticipated amount columns on this report always reflect the most recent cumulative obligated and anticipated data available as of the run date of the report. When a proposal is not associated with an award, the

columns representing award data for that row will display hash tags (#) or the words, “not assigned.” Similarly, if an award is not linked to a proposal in KCRM (the source system for this report’s data), the columns representing proposal data will display hash tags (#) or the words, “not assigned.”

- 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 variables will no longer be available.
- As a default setting, this report excludes proposals with a status of “not funded” and awards with a status of “closed.” Users can change those default settings and bring proposals and awards with those statuses into the report by modifying the parameters on the variable entry panel.
- 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
Proposal Funds Center	<input type="text"/>	
Award Funds Center	<input type="text"/>	
SAP Grant Number	<input type="text"/>	
Proposal Status	!3	!Not Funded
Award Status	!8	!Closed
PI	<input type="text"/>	

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 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 Initial Year Total Amount	The total costs requested for the initial period of the proposed project	KCRM
Proposal Total Project Amount	The total costs requested for the entire proposed project.	KCRM
Total Obligated to Date	The total costs authorized for spending over the life of the award to date (as of the run date of the report).	KCRM
Total Anticipated Costs – Cumulative	Total costs anticipated over the life of the award, inclusive of funds already obligated (as of the run date of the report).	KCRM

*Note: Proposal and award key figures are differentiated by color. Proposal data is displayed in green, and award detail is displayed in orange.

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
Proposal Funds Center	The funds center through which this proposal was submitted.
Proposal PI	The full name and UID of the PI(s) listed on the proposal.
Proposal Number	The unique proposal identifier issued by the KCRM system.
Proposal Title	Formal Title of the research project that is being proposed.
Proposal Sponsor	The sponsor (direct sponsor) to which the proposal was submitted.
Proposal Status	The status of the proposal with regard to the sponsor’s review; for example, pending, funded, withdrawn.
Award Funds 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.
Award PI	The full name and UID of the PI(s) listed on the award

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	
Characteristic	Definition
Award Sponsor	Sponsor (direct sponsor) listed on the Notice of Grant Award
Award Status	The status of the award; for example, approved award, pre-close, closed.

Free Characteristics	
Characteristic	Definition
Award Campus	The campus with which the award funds center is associated (CRC, MED, NEIDL).
Award PI Home Funds Center	The number and name of the Funds Center through which the PI listed on the award is paid.
Award Prime Sponsor	If applicable, the prime (originating) sponsor.
Award Prime Sponsor Type	If applicable, the corresponding sponsor type for the prime (originating) sponsor.
Award Project Start Date	The start date of the award (competing segment), including any pre-award authorization period.
Award 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.
Award School	The school or college with which the award funds center is associated.
Award Sponsor Type	Corresponding sponsor type for sponsor (direct sponsor) listed on the Notice of Grant Award; for example, Federal, Foundation/Association/Society, Industry.
Award Type	The type of funding instrument used by the sponsor; for example, grant, contract, etc.
Non-Employee 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.
Proposal Campus	The campus with which the proposal funds center is associated (CRC, MED, NEIDL).
Proposal Start date	The proposed start date of the total project period.
Proposal End Date	The proposed end date of the total project period.
Proposal PI Home Fund Center	The number and name of the Fund Center through which the PI listed on the proposal is paid.
Proposal Prime Sponsor	If applicable, the prime (originating) sponsor.
Proposal Prime Sponsor Type	If applicable, the corresponding sponsor type for the prime (originating) sponsor.
Proposal School	The school or college with which the proposal funds center is associated.
Proposal Sponsor Type	Corresponding sponsor type for the sponsor (direct sponsor) to which the proposal was submitted; for example, Federal, Foundation/Association/Society, Industry.

Free Characteristics	
Characteristic	Definition
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 unit associated with the award.
Secondary Proposal Funds Center	If applicable, the name and number of an additional unit associated with the proposal.

Results and Next Steps

None