

## **Bio Med Departments Access to Proposal, Award, and Expense Data**

Brown University has several resources to view data on Proposals, Awards, and Expenses. Cognos is used for reports of proposals, awards, and expenses. COEUS is used for reports of current awards and pending proposals information and, Workday is used to run reports for grant expenses.

***For a complete list of reports see the attached Appendix which includes a detailed description of each report you have access to as a Department Manager.***

**VERY IMPORTANT: Cognos reports that include Award count and dollars are based on transactions in the given time period, it is not a one to one.**

### **Most Useful Reports:**

#### **Cognos**

##### **Proposals:**

- **Custom Proposal Report:** This is the most comprehensive Proposal Report in Cognos. The report lets you choose from a multitude of fields to customize your report needs. The report includes all proposals submitted and any proposals that were modified (i.e. revised budgets, dollar corrections, department/PI changes) during the date range selected.

##### **Proposals, Awards, Expenses:**

- **Proposal/Award/Expenditure Activity (by Lead Dept.):** This report will return 4 graphs (1 proposal/award count, 1 proposal costs by FY, 1 award costs by FY, and 1 expenses by FY). Additionally, you will receive three reports which show indirect and direct costs by PI grouped by Lead Department for awards, proposals, and expenses.

#### **Coeus**

**Current & Pending Support:** A comprehensive list of current awards and pending proposals by PI.

- **Current Support:** The report includes awards that the individual has committed effort as a PI, Co-I, and Key Personnel. ***(Please note: % Effort is an average over the life of the award).***
- **Pending Support:** The report includes proposals that the individual has committed effort as a PI, Co-I, and Key Personnel. ***(Please note: % Effort is an average over the proposed life of the award).***

#### **Workday**

- **Sponsored Award Budget to Actuals:** This report gives the user a life-to-date view of either an entire award (can contain multiple grants), or an individual grant itself. The report view includes the project budget, current month expenses, fiscal-to-date and project-to-date expenditures. It will also include cost sharing expenses and outstanding obligations.

***Please contact Rebecca Martish (x31881) in BMRA if you need guidance in running reports.***

*Last Updated 4/18*

## Appendix 1: Definitions

Proposal Type	Definition
Continuation	A non-competing application for an additional funding/budget period within a previously approved project period.
New	An application that is being submitted to an agency for the first time.
Renewal	A competing application requesting additional funding for a period subsequent to that provided by a current award.
Resubmission	An application that has been previously submitted, but was not funded, and is resubmitted for new consideration OR for submitting a REVISED BUDGET to OSP/BMRA for approvals.
Revision	An application that proposes a change in the Federal Government's financial obligations or contingent liability from an existing obligation.
Task Order	Project funded under master agreement.
X- Deleted from System	For Development Proposals you wish to purge from the system. Any proposal with this Proposal Type will be deleted from Coeus on a quarterly basis.

## Department Definitions

Department Type	Definition
Home	The department the PI is affiliated with. In a report by home department: If an award is received by PLM but the PI's home department is Engineering then the award/proposal would be under Engineering and not PLM.
Lead	The department that administers Pre and Post- Award activities. If the PI's home department is Engineering but the award is being administered by PLM then the award/proposal would be under PLM. <b><i>Please Note: Cognos reports default to the Lead Department unless otherwise indicated in the Report.</i></b>



Report Topic	Report Name	Cognos Folder Path	Report Description	Field Columns
Awards	Monthly Award Activity Report	Public Folders> Sponsored Projects Reports for Departments> Awards> Award Activity- Standard Reports> Monthly Award Activity Report	This report includes Award Activity by Department for a selected month and year ( <i>Please note: year is calendar year not Fiscal Year</i> ). You cannot select a range for this report. The award activity includes: New Awards, Competing Renewals, Award Increments/Continuations, Award Deobligations and Awards whose dollars have been adjusted (this report does not include No-Cost Extensions). Awards (Parent Awards) with funding distributed to Child Awards (subaccounts) will appear on the report according to distribution of funds among accounts. Award Activity Count is based on new award sequences on parent awards only.	Department, PI, Award Number, Account Number, Co-Investigators, Title, Sponsor, Proposal Type, Proposal Amount, Award Amount, Start Date, End Date
Awards	Report of Open Awards	Public Folders> Sponsored Projects Reports for Departments> Awards> Award Activity- Standard Reports> Report of Open Awards	This report includes a list of open awards by Lead Department as of the date you run the report. (i.e. if you select active. The report generates a list of active awards as of the date you are running the report). You cannot put in a date range for this report. You can select Award Status, PI, and Sponsor on the prompt screen.	Lead Department, PI, Sponsor Type, Sponsor, Award Status, Award Type, Title, Create Date, Start Date, End Date, Account Number, PI Proposed Percent Effort, Sponsor Award Number, Total Obligated Amount, and Total Anticipated Amount
Awards	Summary Report of Awards by Department	Public Folders> Sponsored Projects Reports for Departments> Awards> Award Activity- Standard Reports> Summary Report of Awards by Department	This report includes the total award dollars (Obligated) and number of awards received by Lead Department. The data is grouped into the following time periods: selected month, current fiscal year to date, prior fiscal year to date, and the last 4 fiscal years. You can drill into the Department to see more detail by PI.	Lead Department Name, Total Award Dollars (Obligated to date), Award Count <b>When you drill into the Department:</b> PI, Co-PI(s), Award Number, Title, Total Award Dollars (Obligated to date), Award Count
Proposals, Awards, and Expenses	<b>Standard Award, Proposal, WD Expense Report Activity</b> <b>Please Note: Data based on (Lead Department)</b>	Public Folders> Sponsored Projects Reports for Departments>Proposal/Award/Expense Activity (by Lead Dept.)> Standard Award, Proposal, WD Expense Report Activity	This report will return 4 graphs (1 proposal/award count, 1 proposal costs across fiscal years, 1 award costs across fiscal years, and 1 for expenses ) plus three reports which show indirect and direct costs by PI grouped by Lead Department for awards, proposals, and expenses. The report displays 4 FYTD columns for comparison. You can select FY and a specific month. To see data for an entire FY you can select June final as the month. Awards File: Award Activity Count is based on new Award sequences on the Parent Awards only.	<b>Awards:</b> Lead Department, PI, BRU ID, Direct, Indirect, Total Cost, Award Count. <b>Proposals:</b> Lead Department, PI, BRU ID, Directs, Indirects, Total Cost, Proposal Count. <b>Expenses:</b> Lead Department, PI, Account Number, Direct, Indirect, and Total Expenditures
Proposal and Awards	Award & Proposal Activity by Investigator (Includes Co-Investigator Activity) <b>Please Note: Data based on (Home Department)</b>	Public Folders> Sponsored Projects Reports for Departments> Proposal/Award/Expense Activity (by Investigator Home Department)>Award & Proposal Activity By Investigator (includes Co-Investigator Activity)	This report includes Award & Proposal Activity based on the <b>Investigator's current home department</b> (as of the run date of the report). You can select FY and a specific month. Included are four reports (i.e. A summary report for Awards and Proposals and detailed report for Awards and Proposals). The reports contain data for the current fiscal year to date and two previous fiscal years. <b>Award Activity Summary by Investigator:</b> Award activity for each PI is summarized in 2 categories (i.e. PI and Co-PI). The report includes only award funds obligated during the fiscal year noted. <b>Award Activity Detail by Investigator:</b> Co-I funds distributed are not totaled, department totals for PI activity only. <b>Proposals Activity Summary by Investigator:</b> Proposal activity includes all proposals submitted and proposal dollars revised for the selected time frame, excluding revised budgets. Proposal activity for each PI is summarized in 2 categories – PI and Co-PI. <b>Proposal Activity Detail by Investigator:</b> Proposal activity includes all proposals submitted and proposal dollars revised for the selected time frame, excluding revised budgets, Department totals are for PI activity only.	<b>Award Activity Summary by Investigator:</b> Investigator, Investigator Type, Award Lead Dept., Direct/Indirect, Funds Obligated, Funds Distributed (to Child Awards)/from Child Awards <b>Award Activity Detail by Investigator:</b> Investigator, Investigator Type, Award Lead Dept., Account #, Sponsor Name, Sponsor Award #, Current Title, Obligation Start and End Dates, Direct/Indirect, Funds Obligated, Funds Distributed (to Child Awards)/from Child Awards <b>Proposals Activity Summary by Investigator:</b> Investigator, Investigator Type, Proposal Lead Dept., Initial Direct Costs, Initial Indirect Cost, Initial Total Cost, Count <b>Proposal Activity Detail by Investigator:</b> Investigator, Investigator Type, Proposal Lead Dept., Proposal #, Title, Sponsor Name, Proposal Type, Status, Initial Direct/Indirect Cost, Initial Total Cost, Period Direct/Indirect Cost, Total Period Cost

Report Topic	Report Name	Cognos Folder Path	Report Description	Field Columns
Proposals, Awards, and Expenses	Standard Award, Proposal, Expense Activity by Investigator <b>Please Note: Data based on (Home Department)</b>	Public Folders> Sponsored Projects Reports for Departments> Proposal/Award/Expenditure Activity (by Investigator Home Department)>Standard Award, Proposal, Expense Activity by Investigator	This report will return 4 graphs (1 proposal/award count, 1 proposal costs across fiscal years, 1 award costs across fiscal years, and 1 for expenses) plus three reports which show indirect and direct costs by PI grouped by <b>Investigator Home Department</b> for awards, proposals, and expenses. The report displays 4 FYTD columns for comparison. You can select FY and a specific month. To see data for an entire FY you can select June final as the month. Awards File: Award Activity Count is based on new Award sequences on the Parent Awards only.	<b>Awards:</b> Home Department, Investigator, BRU ID, Direct, Indirect, Total Cost, Award Count <b>Proposals:</b> Home Department, PI, Brown ID, Direct, Indirect, Total Cost, Proposal Count <b>Expenses:</b> Home Department, PI, Account Number, Direct, Indirect, and Total Expenditures
Success Rates	Proposal Success Rates	Public Folders> Sponsored Projects Reports for Departments> Success Rates> Proposal Success Rates	The report summarizes the success rate for PI(s)/Department(s) for proposals submitted for the selected time period. <i>(Please Note: In Cognos this report is set-up to display as Excel. To get to the prompts click on the blue &gt; button to the right of the screen. The button is the third icon next to the report name).</i> There are several prompts to choose from in the prompts: Proposal Type, Department, PI Name, Sponsor Type and Sponsor. The report excludes the proposal types: revision (i.e. supplements) , pre-proposals, continuations, and proposals that have been voided or withdrawn. The report also excludes proposals and award activity associated with child awards. You can also drill into a specific PI for additional information.	Lead Department, Principal Investigator, Number of Proposals Submitted (proposals submitted during selected period), Number of Proposals Funded (proposals submitted that have been funded to date as of report period end date), Number of Proposals Not Funded ( proposals submitted that have not been funded as of report period end date), Success Rate (Number of Proposals Funded/Number of Proposals Submitted during selected period), Requested Funding for Initial Project Period, Requested Funding tor Total Project Period, Total Obligated Funding for Project Period, Total Anticipated Funding for Project Period. <b>Drill into PI:</b> Proposal Number, Sponsor Name, Title, Number of Proposals Submitted, Number of Proposals Funded, Number of Proposals Not Funded, Success Rate, Requested Funding for Initial Project Period, Requested Funding tor Total Project Period, Total Obligated Funding for Project Period, Total Anticipated Funding for Project Period

## Appendix 3

### COEUS Report

Report Topic	Report Name	Coeus Path to Report	Report Description	Field Columns
<p><i>Proposal and Awards</i></p>	<p><i>Current and Pending</i></p>	<p>Departmental&gt;Personnel&gt;Last Name&gt; Current and Pending Report</p>	<p>A comprehensive list of current awards and pending proposals. The report includes award and proposals the individual is on as a PI, Co-I, and Key Personnel.</p>	<p>Current Support: Sponsor Award Number, Agency, PI/Key-Per, Title, Award Amount, Effective Date, End Date, Effort %, Academic Year Effort % Summer Year Effort % and Calendar Year Effort% <b><i>(Please note: % Effort is an average over the life of the award).</i></b>                      Pending Support: Proposal Number, Agency, PI/Key-Per, Title, Total Direct Cost, Total Indirect Cost, Total Requested, Effective Date, End Date, Effort %, Academic Year Effort % Summer Year Effort % and Calendar Year Effort% <b><i>(Please note: % Effort is an average over the proposed life of the award).</i></b></p>

**Appendix 4**

**Reports Found in Workday: Supplemental Reports and Financial Reports**

Report Topic	Report Name	Report Description	Prompts
Activity	Manager Activity Report - Actuals	Details all operational spend activity for identified organizations; used for transactional reconciliation. This report will also help to identify potential journals to adjust accounting.	<p><b>Organization:</b> Select organization or organization hierarchy to view in your output details.</p> <p><b>Year:</b> Select year for actuals output. You may select multiple years and Display By Year to see a year over year comparison.</p> <p><b>Period:</b> Select the month you would like to view in the details.***</p> <p><b>Worktags:</b> Use to isolate single worktag values to display in results. Ex. Fund, Program etc...</p> <p><b>Exclude Programs:</b> Exclude programs you do not want to view in the results.**</p> <p><b>Exclude Funds:</b> Exclude funds you do not want to view in the results.</p> <p><b>Display By:</b> Select the worktag value you would like to see repeated in each column. For example, when running the report on cost center hierarchy, select Display By Cost Center to see the individual actuals output for each cost center in the hierarchy.</p>
Budget	Manager Activity - Budget vs Actuals	Details budget and actuals detail data for single year for selected organizations.	<p><b>Organization:</b> Select organization or organization hierarchy to view in your output details.</p> <p><b>Year:</b> Select year for budget and actuals output.</p> <p><b>Period:</b> Select the month you would like to view in the details.***</p> <p><b>Worktags:</b> Use to isolate single worktag values to display in results. Ex. Fund, Program etc...</p> <p><b>Exclude Programs:</b> Exclude programs you do not want to view in the results.**</p> <p><b>Exclude Funds:</b> Exclude funds you do not want to view in the results.</p> <p><b>Display By:</b> Select the worktag value you would like to see repeated in each column. For example, when running the report on cost center hierarchy, select Display By Cost Center to see the individual actuals output for each cost center in the hierarchy.</p>
Budget	Budget vs Actuals (Including Balances)	Details operating budget and actual for a given fiscal year as well as an Operating Summary with Balances.	<p><b>Organization:</b> Enter organization or organization hierarchy to view in your output details.</p> <p><b>Plan Name:</b> Select the plan name that corresponds to the fiscal year operating budget (e.g., 2018 Operating Budget).</p> <p><b>Period:</b> Select the month you would like to view in the details.</p> <p><b>Worktags:</b> Use to isolate single worktag values to display in results (e.g., FD100 General Operating)</p> <p><b>Exclude Programs:</b> Exclude programs you do not want to view in results. To exclude all programs, use "Program is Empty".</p> <p><b>Exclude Funds:</b> Exclude funds you do not want to view in the results. Program is Empty: Check this box to exclude all programs from report.</p> <p><b>Display By:</b> Select the worktag value by which you would like to repeat budget and actual data. For example, when running the report on cost center hierarchy, select "Display By" Cost Center to see the budget and actuals output for each cost center. "Company" is defaulted and should be used if you do not wish to repeat by any dimension.</p>
Sponsored	Sponsored Award Budget to Actuals	This report gives the user a life-to-date view of either an entire award (can contain multiple grants), or an individual grant itself. The report view includes the project budget, current month expenses, fiscal-to-date and project-to-date expenditures. It will also include cost sharing expenses and outstanding obligations.	<p><b>Accounting Period:</b> Select the accounting period you would like to view in the details</p> <p><b>Award:</b> Select the award number. Report performance is optimized when an Award Number is included.</p> <p><b>Grant Worktag:</b> Use to isolate single worktag values to display in results (e.g.,GR account)</p>

Report Topic	Report Name	Report Description	Prompts
Sponsored	Sponsored Award(s) Activity - Actuals & Obligations	Details actuals & obligations for selected organizations. This report can be used to track Sponsored Award Activity across multiple Years, Periods & Grants. Report will only return FD500 activity.	<p><b>Organization:</b> Select organization or organization hierarchy to view in your output details.</p> <p><b>Year:</b> Select year for actuals output. You may select multiple years and Display By Year to see a year over year comparison.</p> <p><b>Period:</b> Select the month you would like to view in the details.***</p> <p><b>Worktags:</b> Use to isolate single worktag values to display in results. Ex. Expense Purpose Code, Program etc...</p> <p><b>Display by:</b> Select the worktag value you would like to see repeated in each column. For example, when running the report on a grant hierarchy value, select Display By Grant to see the individual actuals output for each grant in the hierarchy.</p>
Sponsored	Sponsored Award(s) Activity - Actuals	Details actuals for selected organizations. This report can be used to track Sponsored Award Activity across multiple Years, Periods & Grants. Report will only return FD500 activity.	<p><b>Organization:</b> Select organization or organization hierarchy to view in your output details.</p> <p><b>Year:</b> Select year for actuals output. You may select multiple years and Display By Year to see a year over year comparison.</p> <p><b>Period:</b> Select the month you would like to view in the details.***</p> <p><b>Worktags:</b> Use to isolate single worktag values to display in results. Ex. Expense Purpose Code, Program etc.</p> <p><b>Display by:</b> Select the worktag value you would like to see repeated in each column. For example, when running the report on a grant hierarchy value, select Display By Grant to see the individual actuals output for each grant in the hierarchy.</p>
Sponsored	Manager Budgetary Balance Report (MBBR)	This report captures financial activity based on accounting date.	<p><b>Organization:</b> Enter organization or organization hierarchy to view in your output details.</p> <p><b>Company:</b> select Brown</p> <p><b>Plan Structure:</b> Choose Award Business Plan or Operating budget.</p> <p><b>Plan Name:</b> Select the plan name that corresponds to the plan structure selected.</p> <p><b>Year:</b> Use to select year that corresponds to the plan name.</p> <p><b>Summary Period:</b> Use to select annual or quarterly</p> <p><b>Period:</b> Use to select month you would like to view in the details.</p> <p><b>Evaluation Date Option:</b> Choose between accounting or budget date.</p> <p><b>Plan to Date:</b> Select the check box to see plan to date.</p> <p><b>Include Reserved Journals:</b> Select the check box to include reserved journals.</p>
Payroll	Payroll Actuals by Cost Center (with Worktags)	This report is used to review payroll and benefit fringe charges posted to the ledger; it returns a line for every payroll charge by pay component. It is prompted by cost center or cost center hierarchy, and should be run for a single fiscal period.	<p><b>Company:</b> Brown is pre-selected</p> <p><b>Organization:</b> Select organization or organization hierarchy to view in your output details.</p> <p><b>Period:</b> Select the month you would like to view in the details.</p> <p><b>Worktags:</b> Use to isolate single worktag values to display in results.</p> <p><b>Pay Component:</b> Use to isolate a single pay component (e.g., monthly pay, biweekly pay, summer pay).</p> <p><b>Only Return Payroll Accounting Adjustments:</b> Select the check box to see just PAAs processed.</p>
Payroll	Payroll Actuals by Cost Center (Fiscal YTD)	This report is used to review year-to-date total payroll and benefit fringe charges posted to the ledger. It can be run on a cost center or cost center hierarchy that the user supports, expands down to individual cost centers where applicable, then down to period, worker and individual pay components.	<p><b>Organization:</b> Select organization or organization hierarchy to view in your output details.</p> <p><b>Period:</b> Select the month you would like to view in the details to see FYTD.</p> <p><b>Worktags:</b> Use to isolate single worktag values to display in results.</p> <p><b>Pay Component:</b> Use to isolate a single pay component (e.g., monthly pay, biweekly pay, summer pay).</p> <p><b>Only Return Payroll Accounting Adjustments:</b> Select the check box to see just PAAs processed.</p>



Report Topic	Report Name	Report Description	Prompts
Payroll	In Progress Payroll Actuals by Cost Center (By Organization)	This report is used to review payroll and benefit fringe charges posted to the ledger; it returns a line for every payroll charge by pay component. Users note: this report should be run for completed pay periods only for best results.	<p><b>Organization:</b> Select organization or organization hierarchy to view in your output details.</p> <p><b>Period:</b> Select the current periods in process to view.</p> <p><b>Pay Component:</b> Use to isolate a single pay component (e.g., monthly pay, biweekly pay, summer pay).</p> <p><b>Worker:</b> Use to isolate by worker (e.g., location, by manager, etc.)</p> <p><b>Ledger Account:</b> Use to isolate by specific account (e.g., fringe benefits, Postdoc stipends, Graduate TA Scholarships, etc.)</p> <p><b>Cost Center (position and Allocation):</b> Use to isolate by specific Cost Center</p> <p><b>Only Return Payroll Accounting Adjustments:</b> Select the check box to see just PAAs processed.</p>
Supplemental	Manager Expenditure Report - Actual & Obligations	Details all operational spend activity and obligations for identified organizations; used for transactional reconciliation. This report will also help to identify potential journals to adjust accounting and identify upcoming spend based on obligations.	<p><b>Organization:</b> Select organization or organization hierarchy to view in your output details.</p> <p><b>Year:</b> Select year for actuals output. You may select multiple years and Display By Year to see a year over year comparison.</p> <p><b>Period:</b> Select the month you would like to view in the details.***</p> <p><b>Worktags:</b> Use to isolate single worktag values to display in results. Ex. Fund, Program etc...</p> <p><b>Exclude Programs:</b> Exclude programs you do not want to view in the results.**</p> <p><b>Exclude Funds:</b> Exclude funds you do not want to view in the results.</p> <p><b>Display by:</b> Select the worktag value you would like to see repeated in each column. For example, when running the report on cost center hierarchy, select Display By Cost Center to see the individual actuals output for each cost center in the hierarchy.</p>
Supplemental	Manager Expenditure Report - Actuals	Details all operational spend activity for identified organizations; used for transactional reconciliation. This report will also help to identify potential journals to adjust accounting.	<p><b>Organization:</b> Select organization or organization hierarchy to view in your output details.</p> <p><b>Year:</b> Select year for actuals output. You may select multiple years and Display By Year to see a year over year comparison.</p> <p><b>Period:</b> Select the month you would like to view in the details.***</p> <p><b>Worktags:</b> Use to isolate single worktag values to display in results. Ex. Fund, Program etc...</p> <p><b>Exclude Programs:</b> Exclude programs you do not want to view in the results.**</p> <p><b>Exclude Funds:</b> Exclude funds you do not want to view in the results.</p> <p><b>Display by:</b> Select the worktag value you would like to see repeated in each column. For example, when running the report on cost center hierarchy, select Display By Cost Center to see the individual actuals output for each cost center in the hierarchy.</p>
Supplemental	Select Balance Sheet for Managers	Details balance sheet data by asset and liability details, including ledger account for selected organizations.	<p><b>Organization:</b> Select organization or organization hierarchy to view in your output details.</p> <p><b>Period:</b> Select the month you would like to view in the details. Report returns YTD based on this period prompt.</p> <p><b>Worktags:</b> Use to isolate single worktag values to display in results. Ex. Fund, Program etc...</p> <p><b>Display By:</b> Select the worktag value you would like to see repeated in each column. For example, when running the report on cost center hierarchy, select</p>

\*\* To exclude all programs from report click into Exclude Programs, press Ctrl + A when on the listed programs in the prompt and press enter. This will enter all programs into exclude prompt and will return only transactions with no program associated.

\*\*\* Run reports without period selected to return the full selected year's data. Elect a period or periods to return data for that period only.