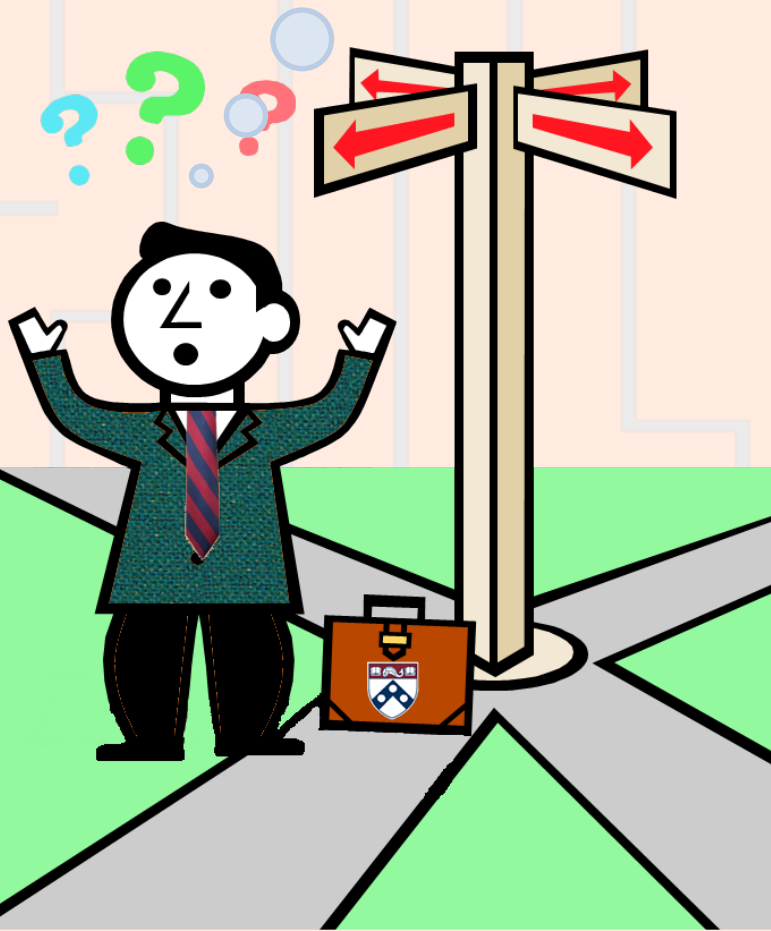
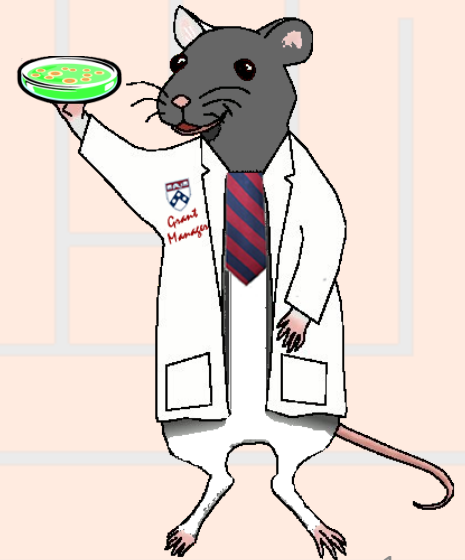


# Cost Sharing Scenario

Which of my awarded projects involve cost sharing?



The following slide will present you with a few questions to help refine your not-very-specific question into a re-defined business question that can be matched to PennERA Proposal data for an answer!



# Cost Sharing Scenario – Step 1a

## Re-defining Your Question

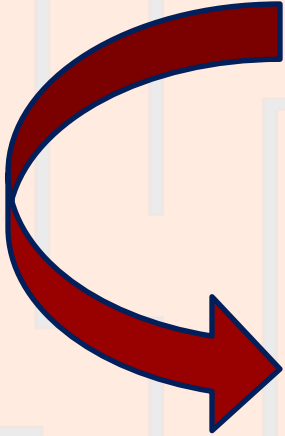
If your business question is not framed correctly (or completely), you will not be able to define your data query adequately. Here are some questions you should ask (and answer!) BEFORE attempting to write your query. Read them and consider what kinds of answers you might come up with. Besides asking/answering these questions, best practice is to check the cautions in the PennERA Proposal [table documentation](#) as well.

- **What do you mean by “project”?** Do you want information on just the latest funding cycle (proposal) for each project, or do you also want to include information on all of the proposals for projects that span funding cycles?
- **What do you mean by “awarded”?** Are you interested only in proposals currently in ‘Awarded’ status, or do you also want to include ‘Closed’ proposals? If ‘Closed’ proposals will be included, how far back in time do you want to go?
- **What do you mean by “my” projects?**
  - Proposals that have a particular person listed as responsible for
    - the project as a whole (the PI)?
    - for one or more accounts (a co-investigator)?
    - the project and/or one or more accounts?
  - Proposals that cite a particular school/center or ORG
    - as the one responsible for the proposal?
    - as the one responsible for one or more increments of funding?
    - as the one responsible for one or more of the fund codes assigned to the proposal?
    - in one or more of the General Ledger account numbers assigned to the proposal?
    - Some combination of the above?
- **What specific information do you want to display in your report?**

# Cost Sharing Scenario – Step 1b

## Re-defining Your Question

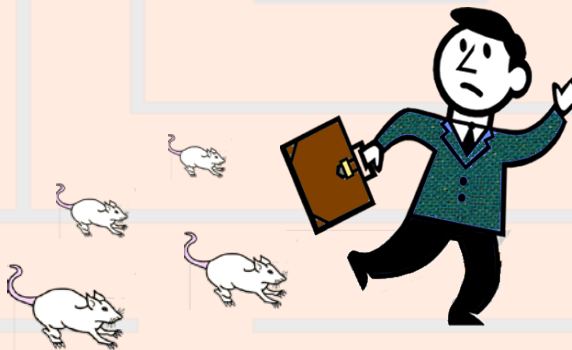
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**Initial question:** “Which of my awarded projects involve cost sharing?”



**Re-defined question:** “I need a report listing each proposal for each project’s latest awarded funding cycle. The proposals I want are currently in ‘Awarded’ status and name the Institute for Contemporary Art (school/center 61) as the proposal responsible school. They also have non-zero cost sharing dollars (awarded non-sponsor costs). The report should display the proposal’s Institution No., the names of the PI and sponsor, the project title, the awarded project start and end dates, and the cost sharing type.”

---



# Cost Sharing Scenario – Step 2

The **Result Objects** that you need are all in the **Pennera Proposal** folder, which includes the proposal's current status. Drag or double click the following objects to make them appear in the **Result Objects** panel:

- **Pennera Proposal:**  
- Institution No (PROP)
- Pi Name (PROP)
- Sponsor Description (PROP)
- Project Title (PROP)
- Awarded Project Start (PROP)
- Award Project End (PROP)
- Cost Shar Type (PROP)
- Awd Project Nonspon Costs (PROP)

**WHY?** → These data elements store information on the proposal as a whole (rather than a period, request, or increment). Most such data elements are available only in the **Pennera Proposal** folder. [More ...](#)


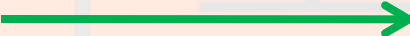


**Pi Name (PROP)** and **Sponsor Description (PROP)** are not stored in the **PENNERA\_PROPOSAL** table, but the **PennERA Proposals Universe** makes them available in the **Pennera Proposal** folder for your convenience.




# Cost Sharing Scenario – Step 3a

To restrict the query so that it retrieves only the proposals you want, use query filters. The order of the filters does not matter, as long as all of them are specified. The filters all involve objects from the **Pennera Proposal** folder: To do this, set up the query filters as follows:

➤ **Proposal Responsible School:**  

- Drag **Proposal Responsible School (PROP)** to the **Query Filters** area.
- Select “Equal to” from the operators, and then select “Constant.”
- Type “61” in the empty field as the school/center code for Institute of Contemporary Art

**WHY?** → This will allow you to retrieve only the proposals that your school/center is responsible for.

➤ **Proposal Status :**  



- Drag **Proposal Status (PROP)** to the **Query Filters** area.
- Select “Equal to” from the operators, and then select “Value(s) from list.”
- Select “Awarded”.

**WHY?** → You are only concerned at this point with “Awarded” proposals, not ones that are “Closed” or “Not funded” etc.

**Case matters!** If you specify awarded rather than Awarded, your query will return no data. To avoid typos, select **Awarded** from the list of values (as done above), rather than entering it by hand.

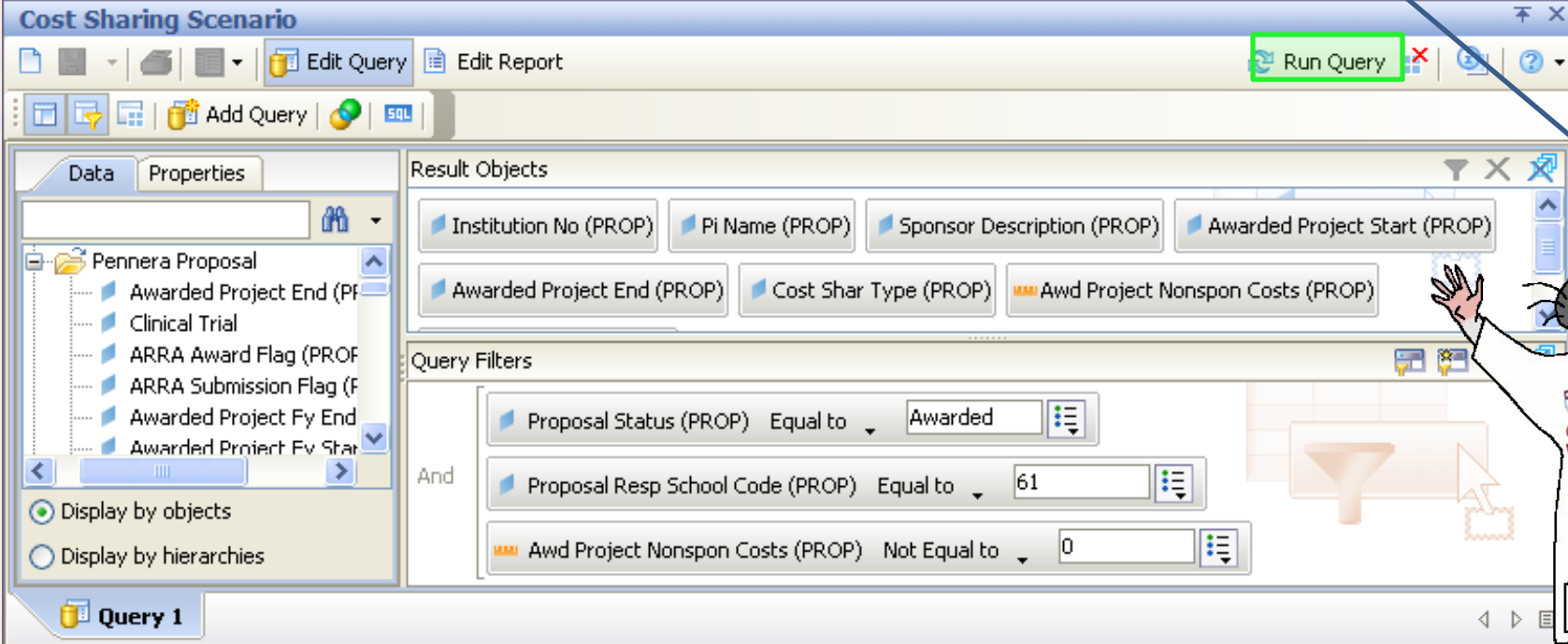
Hints  
and  
Tips

# Cost Sharing Scenario – Step 3b

- **Awd Project Nonspon Costs :**  
- Drag **Awd Project Nonspon Costs (PROP)** to the **Query Filters** area.
- Select “Not Equal to” from the operators, and then select “Constant.”
- Type “0” (zero) in the empty field.

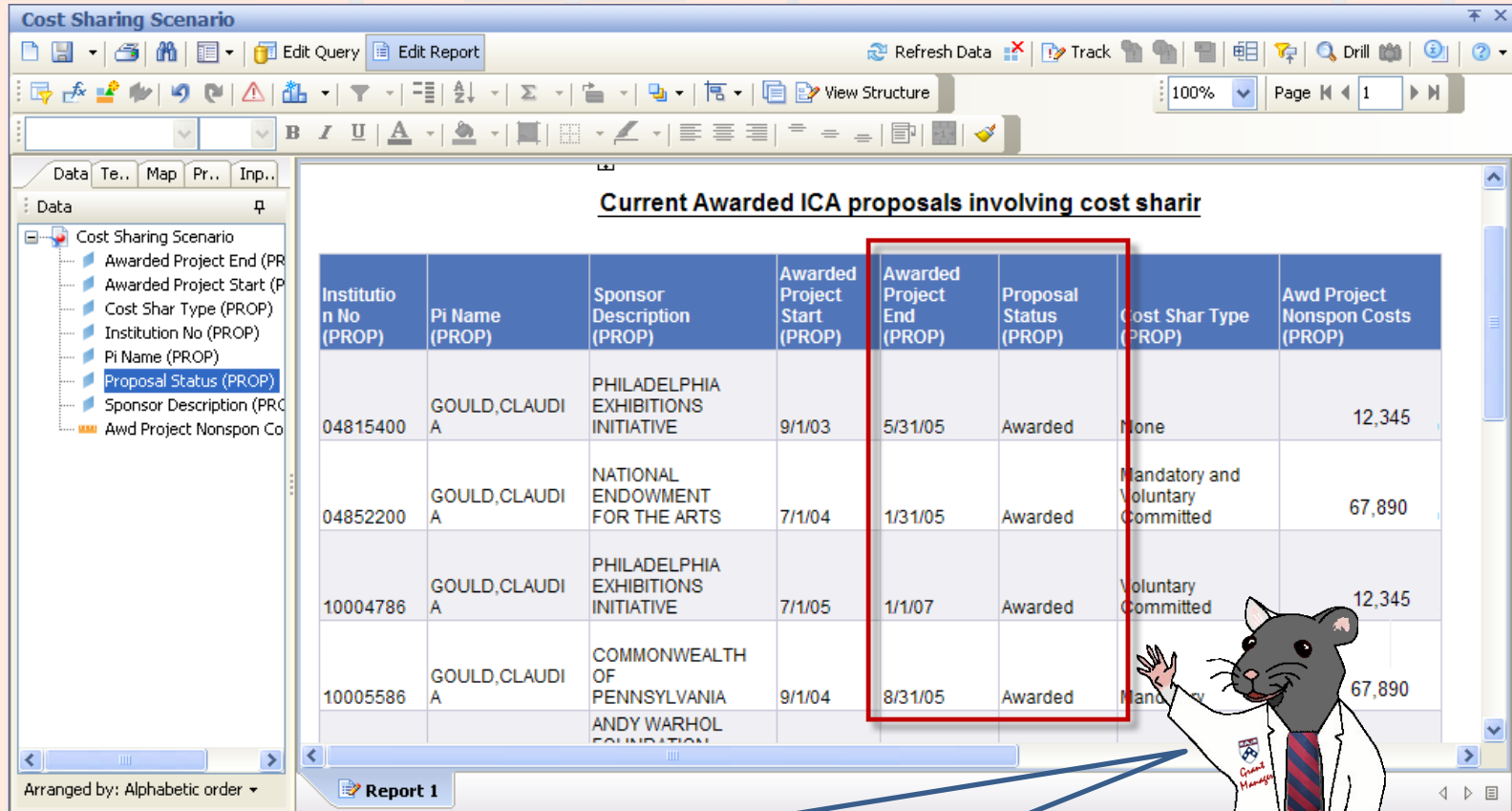
**WHY?** → This will filter out records where the value for the awarded project non-sponsor costs is 0 (zero) or null, retrieving only those proposals that actually have some cost sharing on file.

Your **Edit Query Panel** should now appear like this. Click **Run Query** to advance to the next slide.



# Cost Sharing Scenario – Step 4

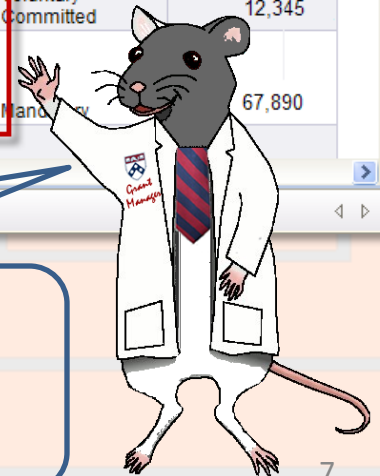
Your **Edit Report Panel** should now appear like this. We have used the **Properties** tab to make some formatting changes so the information is more readable!



**Current Awarded ICA proposals involving cost sharir**

Institution No (PROP)	Pi Name (PROP)	Sponsor Description (PROP)	Awarded Project Start (PROP)	Awarded Project End (PROP)	Proposal Status (PROP)	Cost Shar Type (PROP)	Awd Project Nonspnon Costs (PROP)
04815400	GOULD,CLAUDI A	PHILADELPHIA EXHIBITIONS INITIATIVE	9/1/03	5/31/05	Awarded	None	12,345
04852200	GOULD,CLAUDI A	NATIONAL ENDOWMENT FOR THE ARTS	7/1/04	1/31/05	Awarded	Mandatory and Voluntary Committed	67,890
10004786	GOULD,CLAUDI A	PHILADELPHIA EXHIBITIONS INITIATIVE	7/1/05	1/1/07	Awarded	Voluntary Committed	12,345
10005586	GOULD,CLAUDI A	COMMONWEALTH OF PENNSYLVANIA ANDY WARHOL FOUNDATION	9/1/04	8/31/05	Awarded	Mandatory	67,890

These proposals might need to have their **Proposal Status** changed to 'Closed', or they might need to have their **Awarded Project End** dates changed. Whenever a report turns up data that seems to be out of date (or otherwise incorrect), the user should ask ORS about correcting the data in PennERA.

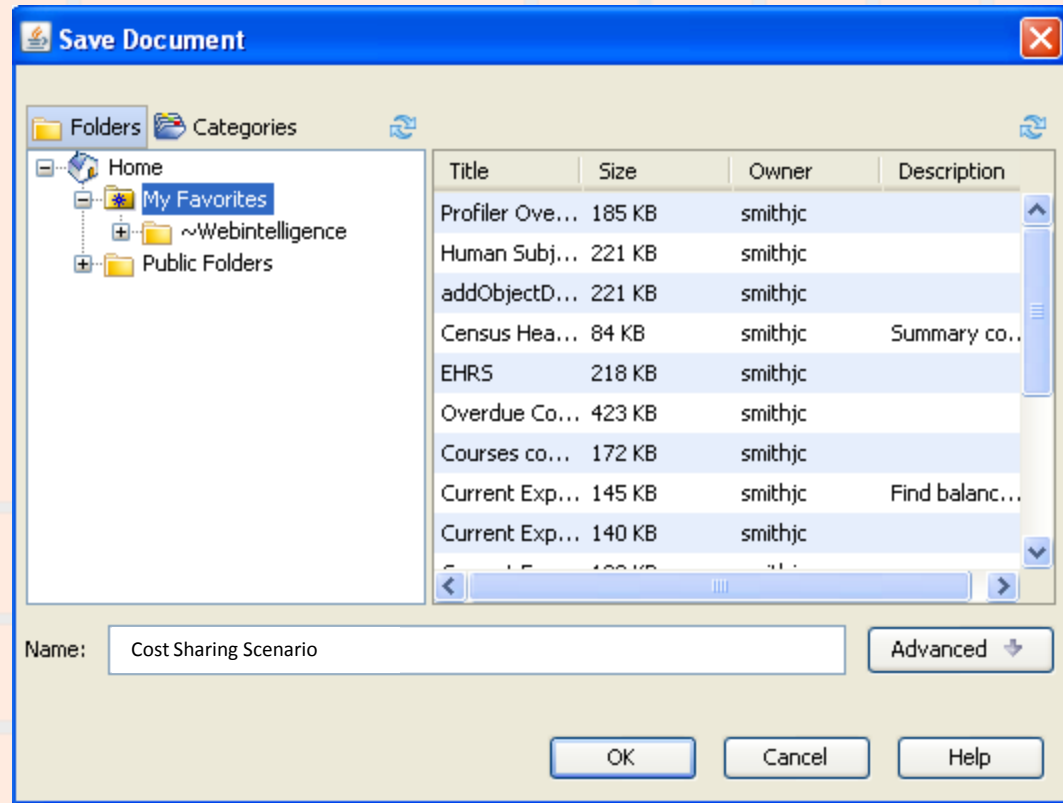
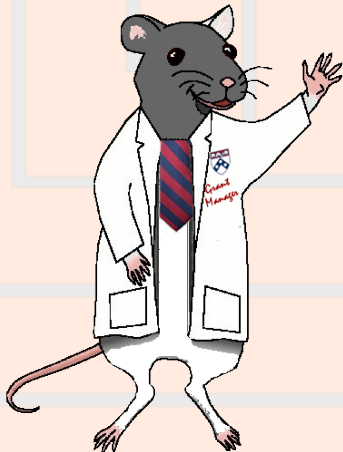


# Cost Sharing Scenario – Step 5

Once you have run your query, you can save it. *If you do further formatting or query edits, continue to save often so you don't lose your work to an untimely "timeout"!*

- Click the **Save** icon and the following **Save Document** dialog box will appear
- Select the **My Favorites** folder on the **Folders** tab
- Type in a distinctive title for your report in the **Name:** textbox
- Click **OK**.

You can only save queries/reports to your own **My Favorites** folder or any subfolders that you have created within it to help organize your cache of reports.

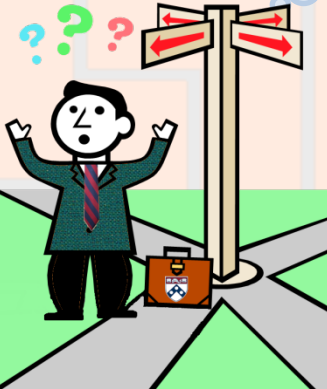




# Cost Sharing Scenario – Wrap Up

Which of my awarded projects involve cost sharing?

The report below shows the ICA's proposals that have non-zero cost sharing dollars and provides the required details for further analysis. Since the project end dates are all far in the past, perhaps the data needs correction to either close the projects or change their end dates.

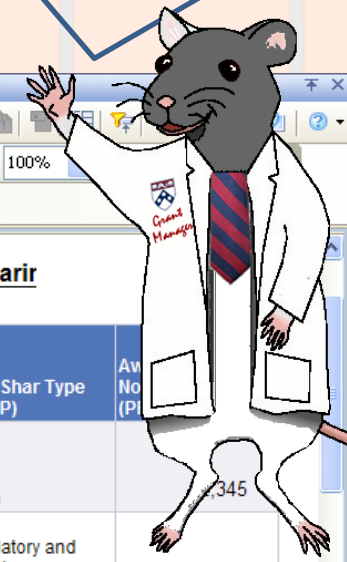


Cost Sharing Scenario

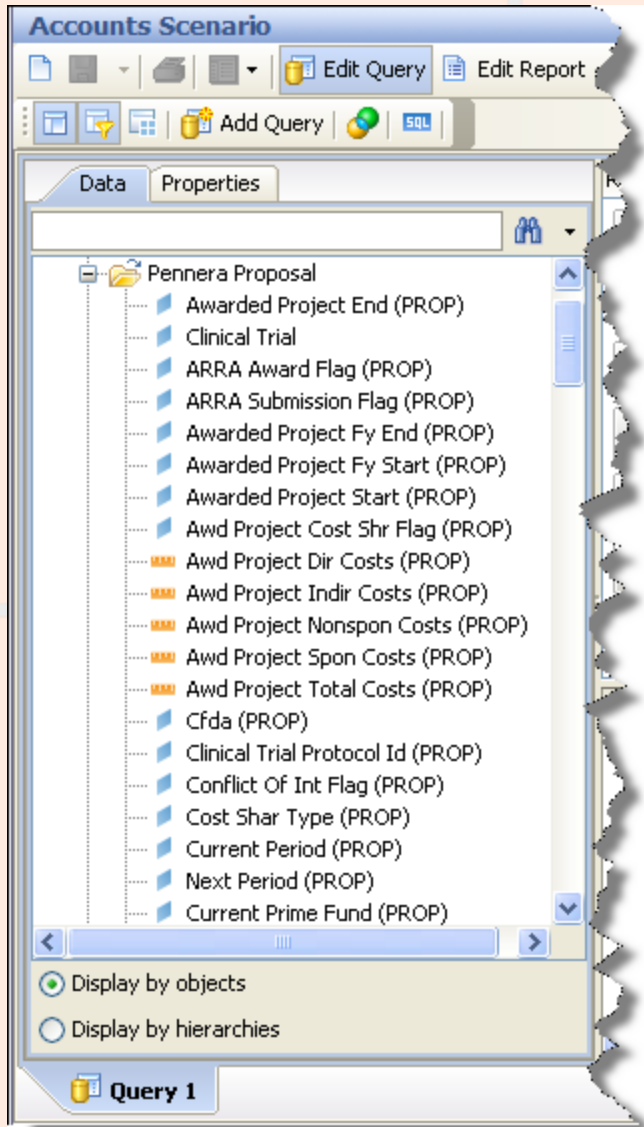
Current Awarded ICA proposals involving cost sharir

Institution No (PROP)	Pi Name (PROP)	Sponsor Description (PROP)	Awarded Project Start (PROP)	Awarded Project End (PROP)	Proposal Status (PROP)	Cost Shar Type (PROP)	Av No (PI)
04815400	GOULD,CLAUDI A	PHILADELPHIA EXHIBITIONS INITIATIVE	9/1/03	5/31/05	Awarded	None	12,345
04852200	GOULD,CLAUDI A	NATIONAL ENDOWMENT FOR THE ARTS	7/1/04	1/31/05	Awarded	Mandatory and Voluntary Committed	67,890
10004786	GOULD,CLAUDI A	PHILADELPHIA EXHIBITIONS INITIATIVE	7/1/05	1/1/07	Awarded	Voluntary Committed	12,345
10005586	GOULD,CLAUDI A	COMMONWEALTH OF PENNSYLVANIA ANDY WARHOL FOUNDATION	9/1/04	8/31/05	Awarded	Mandatory	67,890

Report 1



# Why choose objects from the Pennera Proposal table?



Use the Pennera Proposals table when you want the latest information on the proposal as a whole. Some common uses of the table are:

- **Finding proposals submitted to a particular sponsor.** ("Which proposals were sent to sponsor 09470, the National Institutes of Health?")
- **Comparing what was requested for a funding cycle to what was awarded.**
- **Looking up information on a proposal when its current (or previous) prime fund is known. If awarded funding for a proposal is tracked using more than one fund, the prime fund is the one used to track most of the money.** ("What is the project title for the proposal whose current prime fund is 512345?")
- **Reporting on proposals with particular attributes.** ("What proposals are for Federal Demonstration Projects (FDP Flag = 'Y')?")
- **Looking up information on a project that spans funding cycles.** ("What do we have on record for my project, which is now being funded for the 20th year? The 'First Institution No.' for the project is 12345678.")

You should not use the Pennera Proposals table when you want summarized information for one or more of the proposal's periods, or when you want detailed information on the proposal's requests or increments.