Expected NIH Funding Scenario

Expected NIH Funding 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 "expected funding"?**

  ➢ Are you interested in requested dollars regardless of the requests' status (aside from excluding those that have been unfunded or withdrawn)?

  ➢ Do you want information on funded increments? If so,

    ➢ … you don't want relinquished increments. You probably do not want advance accounts, because that funding is not really from the NIH.

    ➢ … you do want awarded increments. But do you also want future increments?

  ➢ Note: you cannot get information on requests and increments in a single query.

➢ **What do you mean by "NIH"?** Do you want only proposals that were submitted to the National Institutes of Health, or do you also want to include proposals that were submitted to its sub-agencies (such as the National Cancer Institute)?

➢ **What specific information do you want to display in your report?**

Expected NIH Funding Scenario – Step 1b
Re-defining Your Question

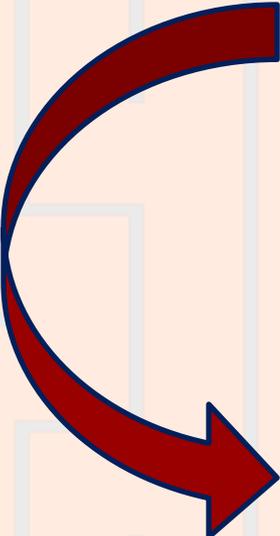**Initial question:** "What is the expected funding from the NIH for Dr. Marie Curie for this fiscal year?"

Re-defined question: "I administratively support Dr. Marie Curie, whose Penn ID is 10009631. I need a list of the increments where she is the PI or the account responsible investigator, and we've received award notices informing us that we can expect funding from the NIH (whether the proposal was submitted to the NIH or to one of its sub-agencies). I understand that funding is not easily mapped to University fiscal years, but I want information on awarded or future increments that apply to budget periods that overlap the current fiscal year (FY 2012). The report needs to display the proposal's Institution No., the names of the PI and the sponsor, the project title, the period number, the awarded period begin and end dates, and the increment's number, status, account responsible investigator, awarded total sponsor costs, sponsor award ID, and GL account number. "

Expected NIH Funding Scenario – Step 2

Most of the result objects that you need are in the **Pennera Increment** folder. Drag or double click the following objects to make them appear in the **Result Objects** panel:

➢ **Pennera Increment :** ❓
  ➢ Account Resp Inv Name (INCR)
  ➢ Award Gl Account (INCR)
  ➢ Awarded Period End Date (INCR)
  ➢ Awarded Period Start Date (INCR)
  ➢ Awarded Tot Spon Costs (INCR)
  ➢ Increment Number (INCR)
  ➢ Increment Status (INCR)
  ➢ Institution No (INCR)
  ➢ Period Number (INCR)
  ➢ Pi Name (INCR)
  ➢ Sponsor Award Id (INCR)
 ➢ Sponsor Description (INCR+)

➢ **Pennera Proposal :** ❓
  ➢ Project Title (PROP)

> **WHY?** ➔Funding questions are often best answered with data from the **PennERA Increment** table. **More…**

> **WHY?** ➔ This is the only table containing the project title, which is useful information. **More…**

Expected NIH Funding 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. However, list the filters on Dr. Curie's Penn ID last, to make it easier to specify the **OR** condition. The filters all involve objects from the **Pennera Increment** folder
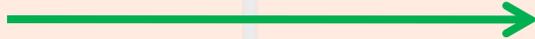
- **Sponsor Parent:** ❓ ➡️
  - Drag **Sponsor Parent (INCR+)** to the **Query Filters** area.
  - Select "Equal to" from the operators, and then type "09470 " in the empty field.

- **Increment Status:** ❓ ➡️
  - Drag **Increment Status (INCR)** to the **Query Filters** area.
  - Select "In list" from the operators, and then type "Awarded;Future" in the empty field.

- **Awarded Period Start Date:** ❓ ➡️
  - Drag **Awarded Period Start Date (INCR)** to the **Query Filters** area.
  - Select "Less than or Equal to" from the operators, and then type "6/30/2012" in the empty field.

CASE SENSITIVE

> **WHY?** ➡️ This is the sponsor code for the National Institutes of Health (see http://www.upenn.edu/computing/da/dw/research/proposals/pennera_sponsor.e.html#sponsor_code)

> **WHY?** ➡️ The question asks for increments with these statuses. You could also have chosen them from the "Value(s) in List" dialog box.

> **WHY?** ➡️ We want data for awarded periods that overlap FY 2012, we want periods that start on or before the last day of that fiscal year (June 30, 2012).
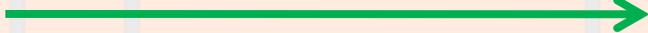
Expected NIH Funding Scenario – Step 3b
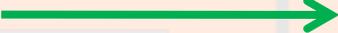
- **Awarded Period End Date :** ❓ ────────────▶
  - Drag **Awarded Period End Date (INCR)** to the **Query Filters** area.
  - Select "Greater than or Equal to" from the operators, and then type "7/1/2011" in the empty field.

  > **WHY?** → We want data for awarded periods that overlap FY 2012, we want periods that end on or after the first day of that fiscal year (July 1, 2011).

- **PI Penn ID:** ❓ ────────────▶
  - Drag **PI Penn ID (INCR)** to the **Query Filters** area.
  - Select "Equal to" from the operators, and then type "10009631" in the empty field.

  > **WHY?** → The Penn ID for Dr Marie Curie. ☺

- **Account Resp Investigator ID:** ❓ ──────▶
  - Drag **Account Resp Investigator ID (INCR)** to the **Query Filters** area.
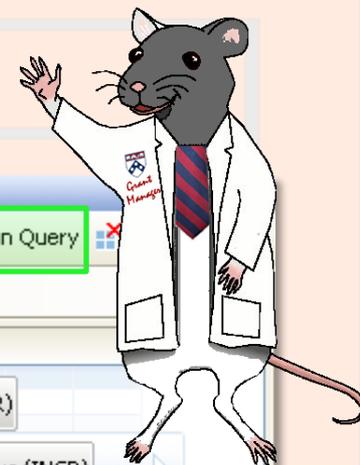 - Select "Equal to" from the operators, and then type "10009631" in the empty field.

  > **WHY?** → The Penn ID for Dr Marie Curie. ☺

Hints and Tips

Get info. to explain how to connect these last 2 filters with an OR by readying the following FAQ: How can I create complex conditions (now called 'Query Filters') by nesting or indenting them together, and using AND and OR? These filters connected by an OR will have the query retrieve data for accounts where Dr. Curie is the PI for the proposal, the investigator responsible for the account, or both.

Expected NIH Funding Scenario – Step 4

Your **Edit Query Panel** should now appear like this. Click **Run Query** to advance to the next slide.
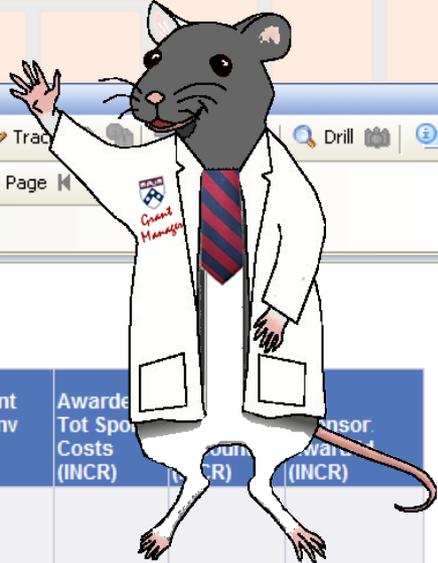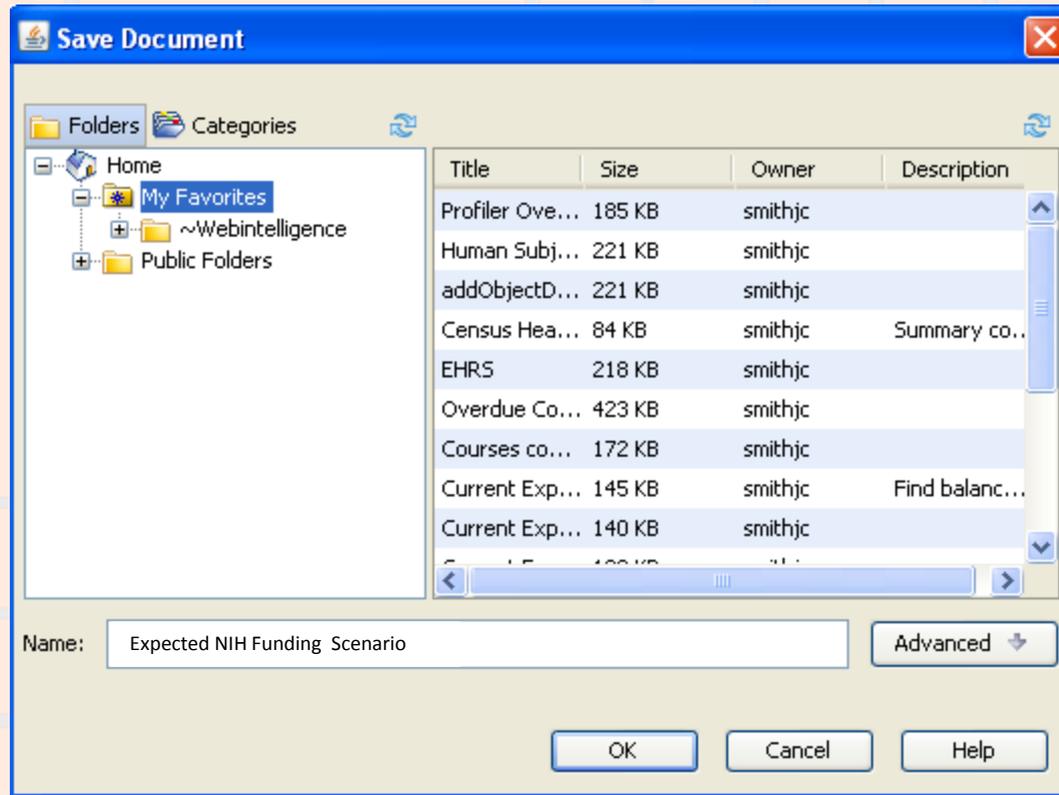
Expected NIH Funding Scenario – Step 5

Expected NIH Funding Scenario – Step 6

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.

Save Document

| Folders | Categories |

Title	Size	Owner	Description
Profiler Ove...	185 KB	smithjc	
Human Subj...	221 KB	smithjc	
addObjectD...	221 KB	smithjc	
Census Hea...	84 KB	smithjc	Summary co...
EHRS	218 KB	smithjc	
Overdue Co...	423 KB	smithjc	
Courses co...	172 KB	smithjc	
Current Exp...	145 KB	smithjc	Find balanc...
Current Exp...	140 KB	smithjc	

- Home
  - My Favorites
    - ~Webintelligence
  - Public Folders

Name: Expected NIH Funding Scenario   Advanced

OK   Cancel   Help

Save Often!

Expected NIH Funding Scenario – Wrap Up

What is the expected funding from the NIH for Dr. Marie Curie for this fiscal year?

The report shows details about funding for projects where Marie Curie is the PI or the account responsible investigator. Only funding from the NIH or its sub-agencies is included. Additional detail is included as per request!

**Names etc. in this table have been changed for privacy reasons!!
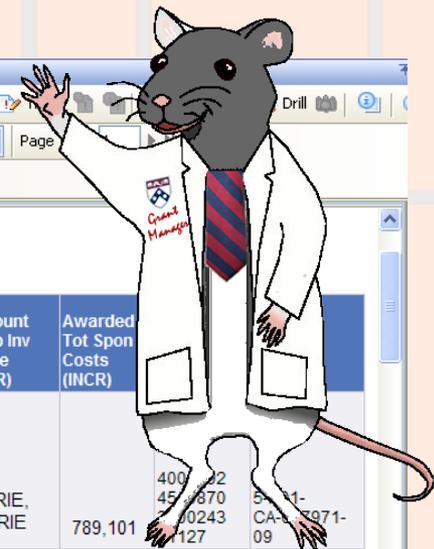
Expected NIH funding for Dr. Marie Curie in FY 2012

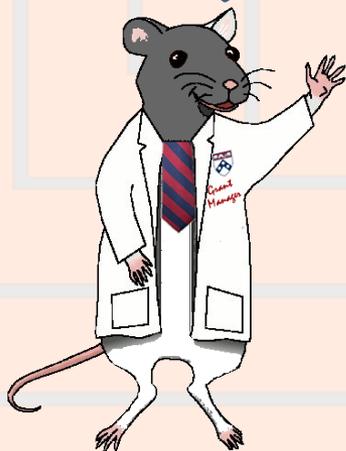| Institution No (INCR)	PI Name (INCR)	Sponsor Description (INCR+)	Project Title (PROP)	Period Number (INCR)	Awarded Period Start Date (INCR)	Awarded Period End Date (INCR)	Increment Number (INCR)	Increment Status (INCR)	Account Resp Inv Name (INCR)	Awarded Tot Spon Costs (INCR)		
10012021	FRANKLIN, BENJAMIN	NATIONAL CANCER INSTITUTE/NIH/ DHHS	PHOTODYNAMIC THERAPY FOR NEOPLASTIC DISEASES INVOLVING S	4	2/1/11	1/31/12	36	Awarded	CURIE, MARIE	789,101	400...2 45...870 ...0243 127	5-...1-CA-...7971-09
10012021	FRANKLIN, BENJAMIN	NATIONAL CANCER INSTITUTE/NIH/ DHHS	PHOTODYNAMIC THERAPY FOR NEOPLASTIC DISEASES INVOLVING S	4	2/1/11	1/31/12	45	Awarded	CURIE, MARIE	123,456	4004492 4549870 3000243 31127	5-P01-CA-087971-09 REVISED

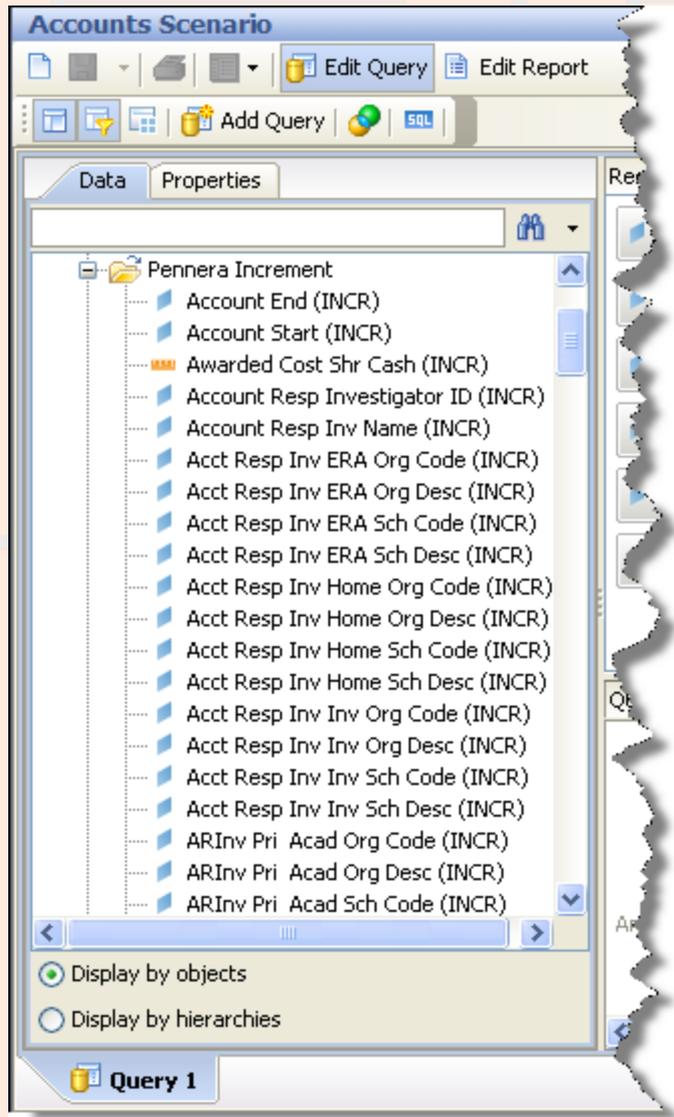# Why choose objects from the Pennera Proposal table?
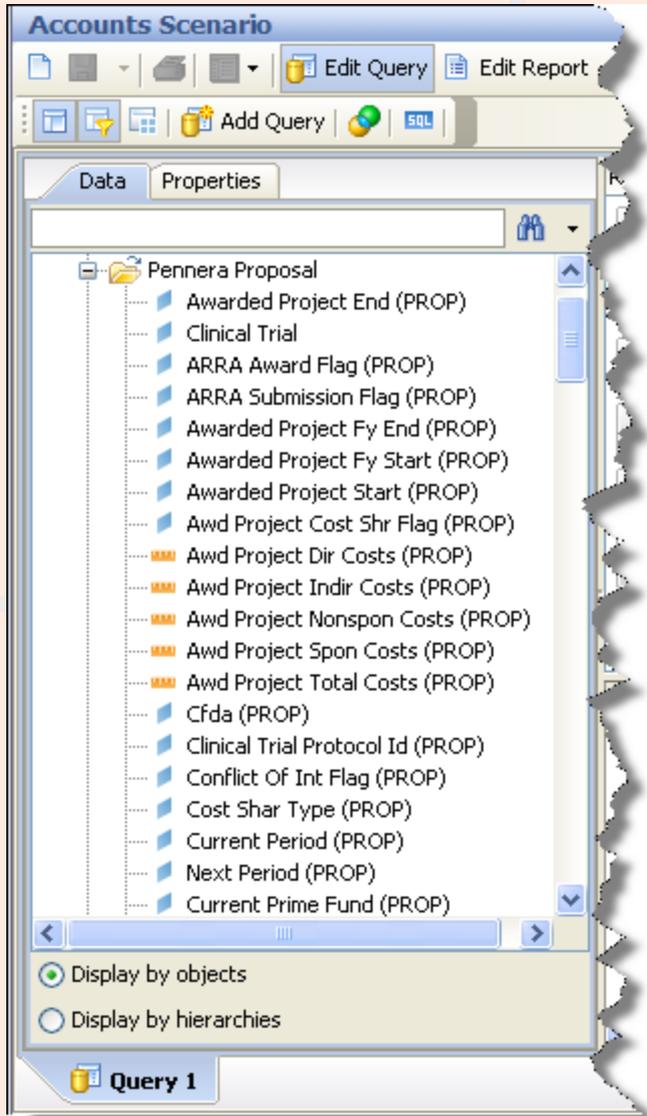
Use the Pennera Proposals table when you want the latest information on the proposal as a whole. Some common uses of the table are:

➢ **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 <u>not</u> 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.

← Return to previous

Why choose objects from the 'Pennera Increment' table?

Select objects from the Pennera Increment table when: You want the latest information on a proposal's funding increments.

Some common uses of the **Pennera Increment** table are:

➢ **Checking the status for an increment**. ("My project is about to go into year two. Have the increments for period 2 changed from 'Future' status to 'Awarded' status yet?")

➢ **Reporting on award payments at a detailed level**. ("List of all of the increments for my project, including the account number, account responsible investigator, the fund responsible investigator, the fund cost sharing parent, the period and increment numbers, the award date, the status, and the total costs.")

➢ **Listing data about a particular award based on the sponsor's award ID**. ("What information is there about NIH award 2-P30-DK19525-26?")

➢ **Retrieving data on awards based on the federal fiscal year of the award appropriation**.

➢ **Getting information on funding based on the award date** (when the sponsor or the University funded the increment).

➢ **Monitoring awards paid in foreign currency**.