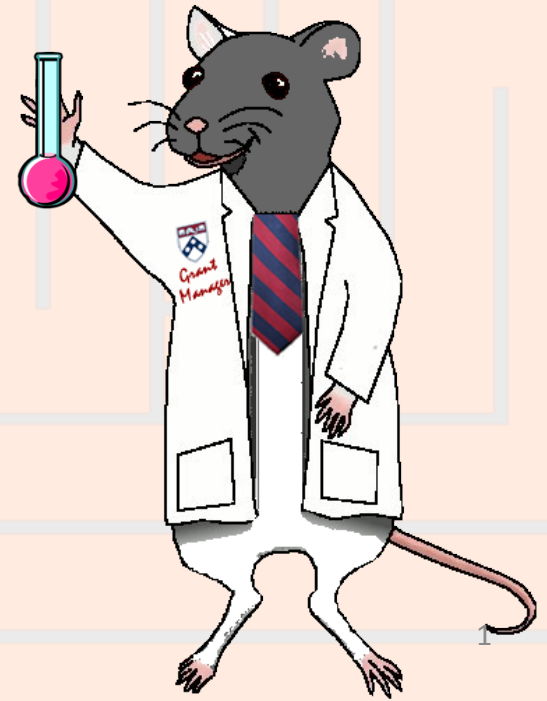


Old Submissions Scenario

Which proposals submitted over a year ago are still awaiting a final decision from the sponsor?

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 Proposals data for an answer!



Old Submissions Scenario – Step 1

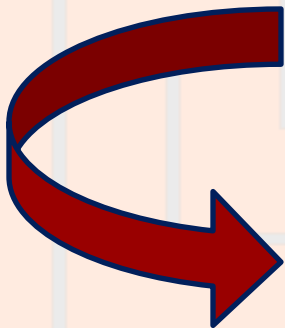
Re-defining Your Question

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 Proposals [table documentation](#) as well.

- Which proposals do you want to check? All of them? Those for a particular Principal Investigator (PI)? For the school/center or ORG responsible for the proposal? For a particular sponsor?
 - How can you tell that we are still awaiting a final decision from the sponsor?
 - What specific information do you want to display in your report?
-



Initial question: “Which proposals submitted over a year ago are still awaiting a final decision from the sponsor?”

Re-defined question: “I need a report on proposals for which my ORG (4611, EB-Center for Clinical Biostatistics) is responsible. The report should include only proposals whose submitted date falls over a year ago, and whose current status is NOT 'Withdrawn', 'Unfunded', 'Awarded', or 'Closed'. The report should display the proposal’s Institution number, the name of the PI, the name of the sponsor, the project title, the submitted date, and the proposal’s current status.”



Old Submissions Scenario – Step 2

For the Result Objects, you'll want objects from the **Pennera Proposal** folder, which includes the proposal's current status. Double click the following objects on the Data tab to make them appear in the **Result Objects panel** or drag them over individually to the panel:

- **Pennera Proposal** :  
- Institution No (PROP)
- Pi Name (PROP)
- Sponsor Description (PROP)
- Project Title (PROP)
- Submitted Date (PROP)
- Proposal Status (PROP)



WHY? → We need to retrieve the most current information about the proposals. (Getting the proposal's current status from the **Pennera Prop Stat Hist** table would be unnecessarily cumbersome.) [More...](#)




Hints
and
Tips

Someone checking the record for a proposal in PennERA's Proposal Tracking module can use the Institution Number (Institution No (PROP)) to find the record quickly if he or she needs more information.

Old Submissions Scenario – Step 3a

To restrict the query so that it retrieves only the proposals you want, use query filters. If you want to filter on a data element that is a Result Object, you can drag it to the Query Filters area either from the Result Objects panel or from the Data tab. The filters all involve objects from the **Pennera Proposal** folder:

- **Proposal Resp Org Code:**  
 - Drag **Proposal Resp Org Code (PROP)** to the **Query Filters** area.
 - Select “Equal to” from the operators, and then type in the ORG code for your organization. (... in this example, **4611** for EB-Center for Clinical Biostatistics).

- **Submitted Date:**  
 - Drag **Submitted Date (PROP)** to the **Query Filters** area.
 - Select “Less than or Equal to” from the operators, then click on the icon at the end of the filter and select “Prompt”.
 - Change the default text for the prompt, if you like.

WHY? → This will retrieve only the proposals for which your ORG is responsible!

WHY? → Use a prompt so that you can re-use this query often without having to edit the query filter before each use. Use prompt text that makes sense to you. The prompt text in this example assumes that when you run this query, you will remember to specify a date with today’s month and day, but last year.

Old Submissions Scenario – Step 3b

➤ **Proposal Status: ?** →

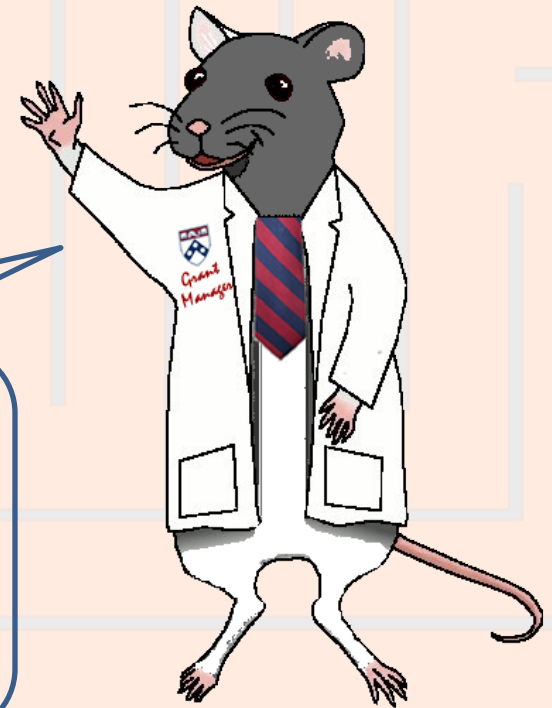
- Drag **Proposal Status (PROP)** to the **Query Filters** area.
- Select “In list” from the operators, and then select “Value(s) from list.”
- Select the following from the list that appears:
 1. *Advance Account*
 2. *In Process*
 3. *Negotiation*
 4. *Negotiation Complete*
 5. *Not Submitted*
 6. *Pending*
 7. *Revised Budget Requested*
 8. *Under Review*

WHY? → We need this filter in order to retrieve the proposals that are still awaiting the sponsor’s funding decision.



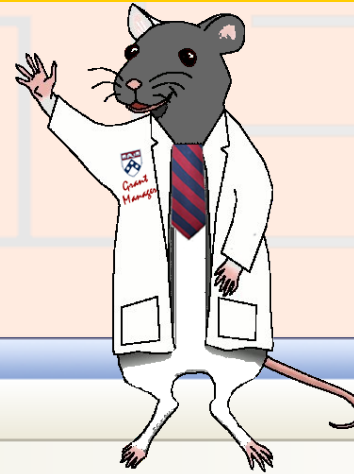
Use these values lists as often as you can to avoid typos or mistakes in formatting that will cause in inaccurate report results!

For example, the **values must be separated with semicolons in Webi**, not commas as in Deski!! These are added correctly in the **List of values** dialog box plus, all the values are spelled correctly!



Old Submissions Scenario – Step 3c

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



Pending Decision Scenario

Edit Query Edit Report

Add Query SQL

Data Properties

Pennera Proposal

- Awarded Proje
- Clinical Trial
- ARRA Award F
- ARRA Submissi
- Awarded Proje
- Awarded Proje
- Awarded Proje

Display by objects
Display by hierarc...

Result Objects

- Institution No (PROP)
- Pi Name (PROP)
- Sponsor Description (PROP)
- Project Title (PROP)
- Submitted Date (PROP)
- Proposal Status (PROP)

Query Filters

Proposal Resp Org Code (PROP) Equal to 4611

And

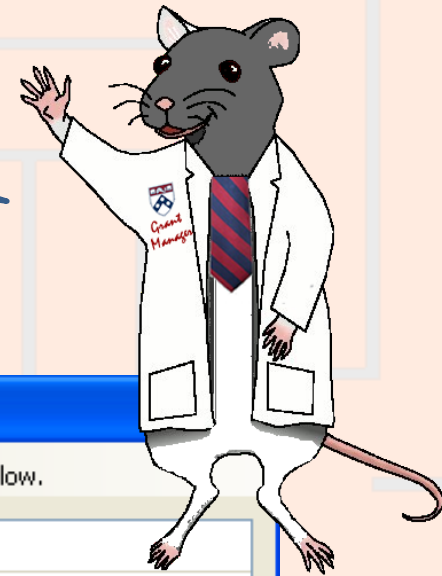
Submitted Date (PROP) Less than or Equal to Enter Submitted Date (PROP):

Proposal Status (PROP) In list Complete;Pending;Revised Budget Requested;Under Review

Query 1

Old Submissions Scenario – Step 3d

Before the query can run, you will be asked to enter the prompt information in the box as you can see here. Remember to specify a date with today's month and day, but last year! Use prompt language that YOU will remember best!



Prompts

Select or type the prompt values for each prompt below.

Submitted date falls on or before this date:

Select a custom date

Run Query

Prompts

Select or type the prompt values for each prompt below.

Submitted date falls on or before this date:

Select a custom date

8/16/2010

Refresh Data Cancel

Old Submissions Scenario – Step 4



Your **Edit Report Panel** should now appear like this. Notice that we have used the **Properties** tab on the left to “Wrap text” in the table headers and body cells so they are more readable!

If a proposal has a submitted date and a status of **In Process** or **Under Review**, then the submitted date, the status, or both definitely need to be corrected. For more information on proposal status values, see http://www.upenn.edu/computing/da/dw/research/proposals/pennera_proposal.e.html#proposal_status

Properties
tab

The screenshot shows a web application interface. On the left, there is a 'Properties' panel for a table. The 'Text Format' section is expanded, showing settings for 'Text Format' with 'Wrap text' checked. The main area displays a table titled 'Proposal Responsible ORG 4611. Should status be changed?'. The table has six columns: Institution No (PROP), Pi Name (PROP), Sponsor Description (PROP), Project Title (PROP), Submitted Date (PROP), and Proposal Status (PROP). The table contains five rows of data. At the bottom of the interface, there is a 'Report 1' tab.

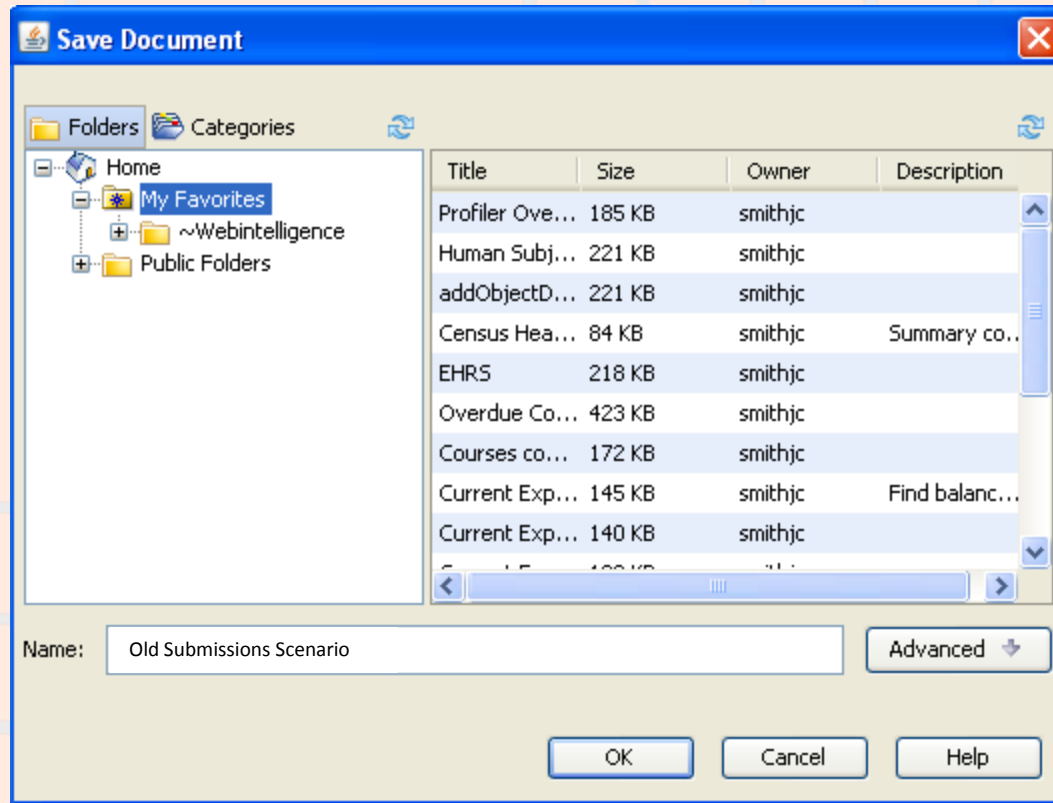
Institution No (PROP)	Pi Name (PROP)	Sponsor Description (PROP)	Project Title (PROP)	Submitted Date (PROP)	Proposal Status (PROP)
10002045	CURIE, MARIE	MERCK & CO., INC.	BRIDGING THE GAPS	4/20/04	Pending
10003070	FRANKLIN, BEN	FOURJAY FOUNDATION	BRIDGING THE GAPS	5/6/04	Pending
10003248	RAMAN, CV	ECRI	USE OF ASPIRIN AND NSAIDs TO PREVENT COLORECTAL CANCER	8/12/04	Pending
10003721	SALK, JONAS	NATIONAL INSTITUTES OF HEALTH WACHOVIA	FOOT ULCERS AND AMPUTATIONS IN CRIC (FACRIC)	10/1/04	Pending

Old Submissions 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.



Old Submissions Scenario – Wrap Up

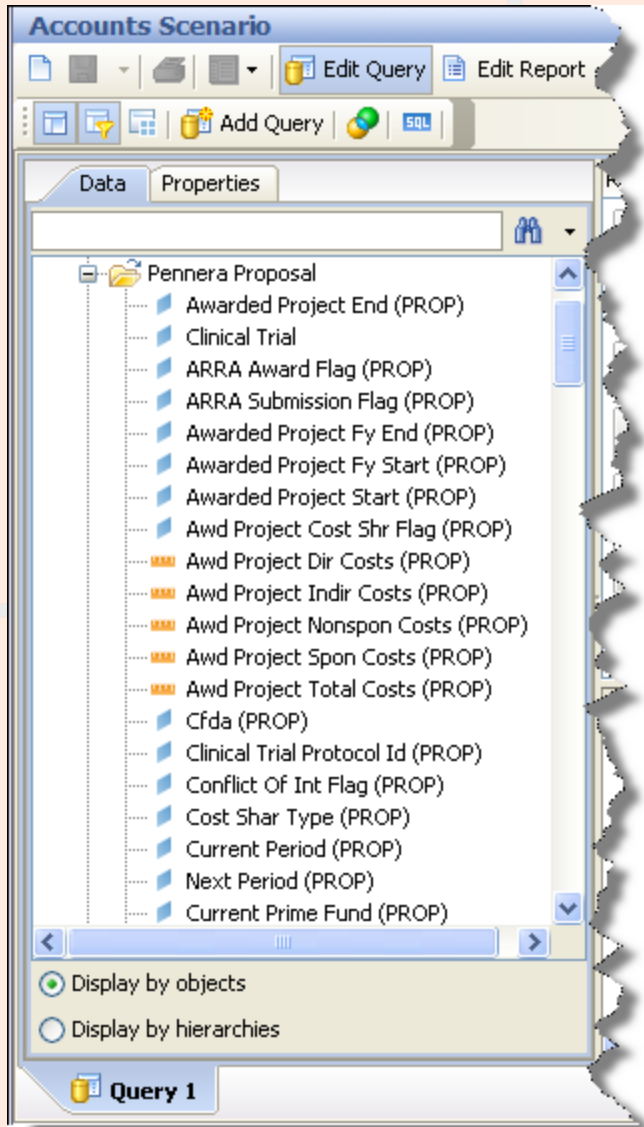
Which proposals submitted over a year ago are still awaiting a final decision from the sponsor?

The report below shows the pending proposals for the Center for Clinical Biostatistics (ORG 4611) that need to have their status re-evaluated. The additional information was requested to help with the follow-up analysis.

Proposal Responsible ORG 4611. Should status be changed?

Institution No (PROP)	Pi Name (PROP)	Sponsor Description (PROP)	Project Title (PROP)	Submitted Date (PROP)	Proposal Status (PROP)
10002045	CURIE, MARIE	MERCK & CO., INC.	BRIDGING THE GAPS	4/20/04	Pending
10003070	FRANKLIN, BEN	FOURJAY FOUNDATION	BRIDGING THE GAPS	5/6/04	Pending
10003248	RAMAN, CV	ECRI	USE OF ASPIRIN AND NSAIDS TO PREVENT COLORECTAL CANCER	8/12/04	Pending
10003721	SALK, JONAS	NATIONAL INSTITUTES OF HEALTH WACHOVIA	FOOT ULCERS AND AMPUTATIONS IN CRIC (FACRIC)	10/1/04	Pending

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.