

# **Proposal Summary Report Expanded Search Criteria**

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## Overview

The Proposal Summary Report supplies various standard information on InfoEd records. It is a flexible report that does not supply a filtered output like the Award Summary Report and so may require more care when interpreting the data. It is not meant to be used for data relating to awards.

Department proposal counts over time, sponsors applied to, or other details can be pulled from the report, however, because a specified output such as only proposals submitted to sponsors is not built into the report, users must manually filter the statuses of records in the report to get to this kind of answer. For example, records still in the In Development or Grant Proposal Review stages will still appear on the report and shouldn’t be counted toward submission metrics. Many status history entries relate to internal OGC (Office of Grants and Contracts) business processes, so consult OGC for any data questions.

## Location

Team content > eRA > CU Denver| Anschutz > Proposal Tracking



## Prompts

Note: Some prompts have a blue Options hyperlink that can be clicked to expand the search criteria. Case sensitivity may be adjusted and any of four search options may be selected: 1) Starts with any of these keywords, 2) starts with the first keyword and has all the remaining keywords, 3) Contains any of these keywords, 4) Contains all these keywords.

Associated Department (select node)

* The “select node” version of the prompt will include results for the selected node and all orgs below it in the org tree

Associated Department (select depts)

* The “select depts” version of the prompt will only include records that the specific department has been searched for and will not include records for orgs below it in the org tree. All desired orgs must be added individually. This is more suited to multi-departmental searches

Select Primary Investigator Name

* Also allows for searching by Employee ID

Select Project/Acct/Misc Number

* This will be Project ID(s) for awarded records, an Activity Code, or the potential grant number depending on the stage in the application cycle of records at the time of the search

Proposal Type

Sponsor Type

Current Status

Sponsor

Deadline Date

Process Date

Submit Date



## Columns

Institution Number

Department

PI Name

Proposal Created By

Status

Proposal Type

Sponsor

Sponsor Type

Project Title

Program Type

Instr. Type

Process Date

Deadline

Returned to Dpt

Submit Date

Activity Code

Activity Description

Proposal Account Number

Requested Project Period Start

Requested Project Period End

Proposed Direct Costs

Proposed Indirect Costs

Proposed Total Costs

Award Date

Awarded Project Period Start

Awarded Project Period End

Award No.

Awarded Direct Costs

Awarded Indirect Costs

Awarded Total Costs

Create Date

PD?

## Tabs

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