



## **What is UR-Coeus Reporting?**

UR-Coeus Reporting is an easy-to-use reporting tool that provides users with access to the sponsored project data that resides in UR-Coeus. The main features offered in the UR-Coeus Reporting system are pre-formatted (canned) reports and the proposal and award query function. UR-Coeus Reporting contains sponsored project information going back to July 1990.

## **Logon to UR-Coeus Reporting**

When you logon to UR-Coeus Reporting, you will be connecting to "Investigator", a server that is located in the Towne House. While the server will generally be accessible 24 hours a day, support for the application will be provided by ORPA during the normal business hours of 8 AM to 5 PM.

ORPA will issue a userid and password for UR-Coeus Reporting users. It is recommended that you change your password after logging into UR-Coeus for the first time. To do this, go to the "Tools" menu, "Change Password" option. You will be prompted to enter a new password and then confirm that password on the next line. Please note that the first character of your password must be a letter.

## **Comments/Feedback**

We look forward to and welcome your [feedback](#) with respect to UR-Coeus Reporting. Should you have any questions, concerns, or suggestions, please do not hesitate to contact any of the following members of the UR-Coeus implementation team:

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## Reports

Several canned reports have been developed based on the type of information that ORPA has typically been asked to provide to the university community. These reports can be generated with a minimal amount of user-entered criteria. The following reports can be found under the “*Reports*” menu:

### Proposal Reports

- Submitted Proposal Summary by Unit
- Submitted Proposal Summary by College
- Pending Proposals
- Pending Proposals - (Competing)
- Pending Proposals - (Non-Competing)
- Submitted Proposals by Status
- Submitted Proposals - Competing
- Submitted Proposals - Non-Competing
- Proposals by Title Search

### Award Reports

- NIH Award Summary by College
- Award Summary by College
- Award Summary by Sponsor Type
- Award Summary by Activity Type
- Awards - Current / Historical
- Awards by Unit Name
- NIH Awards by Unit Name
- NIH Awards w/o Committed Support
- Awards by Title Search
- Awards by Special Review

## Tips for Generating Reports

Once you have selected a report, a criteria screen for that report will be displayed. You will be prompted to enter information specific to that query (e.g., date ranges, unit name, sponsor type). You can choose not to enter criteria for any given query or field within a query. Please be aware that if you choose to enter little or no report criteria, the system will gather and display all records that meet the conditions of the criteria specified. This could result in slow server response time and very lengthy reports. It is more efficient to structure your queries with concise report criteria whenever possible.

## Use of Wildcard Character (%) in Reports

The system utilizes the percent sign (%) as a wildcard character. The wildcard function allows for the use of partial search criteria and is extremely helpful when specifying report criteria. The wildcard can be used in all the report criteria fields except for date fields and fields where valid criteria are supplied on drop-down menus.

For example, if you want to find all the awards received from sponsors with “Johnson” in their name, you could use the “Awards – Current/Historical” query (found under Awards ==> Detail Reports) and type %johnson% in the Sponsor Name Search String. That query would display awards received from the Robert Wood Johnson Foundation, Johnson & Johnson, Johnson Wax, and the RW Johnson Pharm. Research Inst.

When retrieving information for a specific department (also referred to as "Unit" in UR-Coeus Reporting), you will need to enter the department name exactly as it appears on the UR-Coeus Unit Numbers and Unit Names list. You can also use the wildcard character to find departments when you are not certain of the exact spelling of the department name within the Coeus system. For example, typing *bio%* in the Unit string field will provide information for the departments of Biology, Biochemistry & Biophysics, and Biostatistics.

### **Report Editing Options – Sort, Filter, and Save As**

Once you have a report displayed on the screen, you have the option to sort and filter the data and then save the report to another format. Under the "View" menu, you will find the "Sort" and "Filter" features. You are able to sort or filter on several of the data fields that are presented in the query.

If you wish to further manipulate the report data, you can use the "Save As" option found under the "File" menu. This allows you to save your data as various file types, e.g., Excel, Dbase, Text, and then further format the report using those software applications.

You can also display several reports during your UR-Coeus Reporting session and toggle back and forth between the result screens. Use the "Window" menu to select the report that you want to display from the list that appears on the menu.

## Proposal and Award Query

UR-Coeus Reporting offers a query function in addition to canned reports. The query function allows users to search for specific proposal or award records and then look at detailed information for each project. This feature can be found under the "File" menu by selecting either *Open Proposal Query* or *Open Award Query*. Upon selecting one of the queries, the user is presented with a grid in which they can specify selection criteria. The following fields can be queried:

### Proposal Query

proposal number (ORPA ID number)  
proposal type (drop-down menu provided)  
account number  
unit (department) number\*  
unit (department) name\*  
principal investigator  
sponsor code  
sponsor name

### Award Query

award number  
UR award number  
account number  
sponsor code\*  
sponsor name\*  
principal investigator  
unit (department) number  
unit (department) name  
OSP administrator

\*lists available from the ORPA website at: [www.rochester.edu/ORPA/URCOEUS](http://www.rochester.edu/ORPA/URCOEUS)

To produce successful queries, the user needs to become familiar with using the percent sign (%), which is a wildcard character, along with the word "like" within the criteria grid. Please note that the "like" command will only work within the *Open Proposal* or *Open Award Query* functions. It cannot be used on the criteria screens of the canned reports found under the "Reports" menu.

For example, if you want to produce a list of proposals that "Dr. Jones" is associated with, you would go to *Open Proposal Query* and type the following in the principal investigator box: *like jones%*. This criteria produces a list of proposals where either the principal investigator or any co-investigator has the last name of "Jones". Once the information is displayed on the grid, you can then sort the data by simply clicking on the column heading of any field. After you identify the particular proposal that you would like to look at, highlight the line that it is on and then click on the *Display* button. The system will display all the information about this proposal that is stored in UR-Coeus.

The proposal and award query result set can be saved into different formats, e.g., Text or Excel by clicking on the "Save As" button. The result set can then be printed in its entirety.

## **Rolodex Feature**

UR-Coeus Reporting includes a Rolodex feature that allows users to look up names, mailing addresses, and telephone numbers of organizations and agency officials. The Rolodex can be found under the *"File"* menu.

## Descriptions of Proposal Reports

### Summary Proposal Reports:

***Submitted Proposal Summary by Unit Name*** - This report will produce a list of the number of proposal applications submitted and the dollars requested during a user-specified date range. It lists statistics for each department within a college/school that meet the supplied report criteria.

***Submitted Proposal Summary by College*** - This report will list the number of proposal applications submitted and the dollars requested during a user-specified date range. It does not provide detailed information for departments within a school or college.

### Detail Proposal Reports:

***Pending Proposals*** – This report produces a list of all pending proposal applications. The user can specify information for a particular department, investigator, or college/school. The information displayed on this report includes the investigator, proposal title, agency submitted to, requested project period, direct, indirect, and total project period dollars requested, the type of application submitted (new, renewal, continuation), and the purpose of the project (research, training/fellowship, etc.).

***Pending Proposals - (Competing)*** - This report will produce a list of all pending, competitive proposal applications. This report is identical to the *Pending Proposals* report except that the information is limited to competitive (new and renewal) proposal applications. The user can specify information for a particular department, investigator, or college/school. The information displayed on this report includes the investigator, proposal title, agency submitted to, requested project period, direct, indirect, and total project period dollars requested, the type of application submitted (new, renewal, continuation), and the purpose of the project (research, training/fellowship, etc.).

***Pending Proposals - (Non-Competing)*** - This report will produce a list of all pending, non-competitive proposal applications. The report is identical to the *Pending Proposals* report except that it only reports on continuation and supplemental applications. The user can specify information for a particular department, investigator, or college/school. The information displayed on this report includes the investigator, proposal title, agency submitted to, requested project period, direct, indirect, and total project period dollars requested, the type of application submitted (new, renewal, continuation), and the purpose of the project (research, training/fellowship, etc.).

**Submitted Proposals by Status** - The report provides a snapshot of the current status of proposals submitted during a user specified time frame. For example, a user can specify a department name and the fiscal year start and end date. The system will return a list of all proposals submitted during that time period, grouped by the current project status. The report information includes the proposal status, proposal type (new, renewal, continuation, etc.), the principal investigator's name, sponsor name, dollars requested, and the ORPA project number.

**Submitted Proposals – Competitive** – This report will generate a list of competitive proposal applications submitted between a range of user-specified dates. The user also has the option of specifying a particular sponsor name, sponsor type, college/school, or specify program announcement to which a proposal was submitted. The report information includes the principal investigator's name, sponsor name, project title, proposal status, proposal type (new or renewal), dollars requested, and the ORPA project number.

**Submitted Proposals – Non-Competitive** – This report will generate a list of non-competitive proposal applications submitted between a range of user-specified dates. The user also has the option of specifying a particular sponsor name, sponsor type, college/school, or specify program announcement to which a proposal was submitted. The report information includes the principal investigator's name, sponsor name, project title, proposal status, proposal type (continuation or supplemental), dollars requested, and the ORPA project number.

### **Miscellaneous Proposal Reports:**

**Proposals by Title Search** - This report was designed to search the project titles of all proposals and find a particular word or words that the user specifies. The wildcard (%) should be used in this query to be most effective. For instance, by typing *%cancer%*, a list of all proposals that have the word "Cancer" in the project title is returned. The user is also given the option of selecting proposals submitted after a specific date, thereby displaying only recent proposal submissions.

The data displayed on the report includes the investigator name, department, project title, the sponsor type and name, the requested dollars, the date the proposal was submitted, the type of proposal (new, renewal, continuation, etc.), and the current funding status (pending, accepted, rejected).

## Descriptions of Award Reports

### Summary Award Reports:

***Award Summary by College*** - This report can produce two different sets of award information based on a user-specified date range. The user can select records based on the date an award was issued to the University or based on when the current budget period begins. The report can be run for a particular school or college or for all schools or colleges within the University by leaving the College field blank on the report criteria screen.

The report lists all the departments within a college or school and the associated dollars of those award actions. Award actions can encompass no-cost extensions issued on current awards, payments received on clinical trials, and other types of actions that do not necessarily involve additional dollars. Therefore, the number of award actions listed on the report does not represent the number of active awards.

***NIH Award Summary by College*** -- This report offers the same features and information as the *Award Summary by College* report except that it is NIH exclusive.

***Award Summary by Sponsor Type*** – This report summarizes funding received by sponsor type (e.g., Federal, State, Foundation, etc.). The user can enter a specific date range and/or college/school if desired.

***Award Summary by Activity Type*** – This report summarizes funding received by activity or purpose type (e.g., research, fellowship, clinical trial, etc.). The following user-specified criteria can be input if desired: awards received between a specific date range, awards with the current budget period starting between a specific date range, and awards for a specific college/school.

### Detail Award Reports:

***Awards – Current / Historical*** - This report offers the user the most versatility of all the available reports. There are seven criteria that the user can provide. They include: Activity Type, Sponsor Type, Sponsor Name, Sponsor Award Number, Unit (Department) Name, Award End Date, and PI Name. The use of the wildcard character (%) is especially useful when using the Sponsor Name, Sponsor Award Number, Unit Name, or PI Name criteria fields.

The information displayed on the report includes the investigator name, department, project title, sponsor, sponsor award number, UR award and sequence number, activity type, indirect cost rate, current budget period, project period to date, anticipated period, the direct, indirect, and total cost dollars for the current budget period, project period to date, and anticipated period.

***Awards by Unit Name*** - This report can produce two different sets of award information based on a user-specified date range. The user can select records based on the date an award was issued to the University or based on when the current budget period begins. The user also has the option of specifying a department or sponsor name. The information returned includes the investigator's name, the project title, the project sponsor, the current budget period, the sponsor award number, and the current direct, indirect, and total costs.

***NIH Awards by Unit Name*** - This report offers the same features and information as the *Awards by Unit Name* report but contains only NIH award data.

***NIH Awards w/o Committed Support*** - This report identifies NIH awards that are in their final year of support (thus there are no remaining committed support dollars to be received). The user can retrieve records based on the date an award was issued to the University or based on when the current budget period begins. The information on the report includes the principal investigator name, department, sponsor award number, award end date, and project title.

#### **Miscellaneous Award Reports:**

***Awards by Title Search*** - This report was designed to search the project title of all awards and find a particular word or string of words that the user specifies.

The data displayed on the report includes the investigator name, department, project title, the sponsor type and name, the dollars received in the current budget period, the dollars requested in the proposal, the sponsor award number, the UR award number, and the purpose of the project.

***Awards by Special Review*** - This report was developed to provide recent award activity (occurring in the last 31 days) to the various areas within the university that sign off on proposals prior to submission. It provides information on projects involving research subjects, animal usage, biostatistics, biohazard materials/rDNA, and Strong Memorial Hospital facilities. Note: Information regarding radioactive isotope usage has been collected in UR-Coeus since fall 1997. There is no historical data for this field prior to fall 1997.