

# CAS Proposal Report

## Instructions for Use

---

Drafted Nov 2022, CAS Advancement Services

# Table of Contents

---

1. Report Purpose
2. How to use/navigate the report
3. Report caveats
4. Who to send questions/feedback to



# 1. Report's Purpose

---

- > **This report is for Dean's Office users who want a summary of proposal submissions from their respective units.**
  - “How many proposals did Geography submit last month/FY?”
  - “What sponsor types were those proposals for?”
- > **It shows historical graphs using data as far back as FY12**
  - “How has proposed/asked funding changed over the years?”



## 2. How to use/navigate the report

- > If working remotely, ensure logged into VPN
- > Navigate to the report [found at [link](#)]
- > Open the summary page:

Explore / Unit Gift Funds - Master List / Proposal Report (Gift and Grant)

Search for views, metrics, workbooks, and more

Proposal Report (Gift and Grant) ☆ ⓘ ...

Owner Mike Lee Modified Nov 9, 2022, 2:40 PM Extract (Encrypted) Mar 29, 2022, 1:43 PM

Shows all Advance proposals and eGC1's that have come through OSP/Advancement.

Edit Workbook

Views 4 Data Sources 1 Connected Metrics 0 Custom Views 0 Extract Refreshes 0 Subscriptions 0

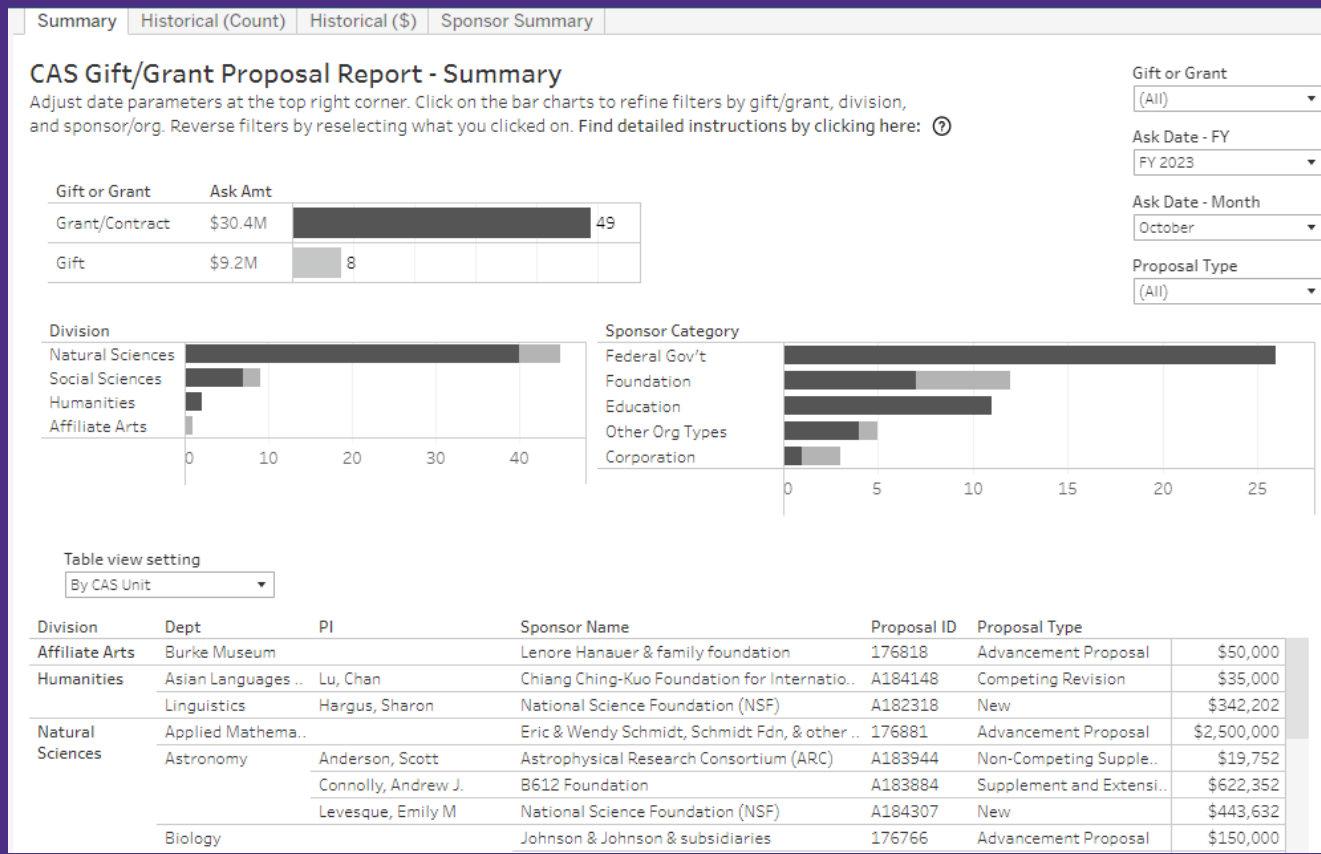
Select All Sort By: Sheet (first-last) ↑

User Specific View User Specific View User Specific View User Specific View

Summary ☆ ... Historical (Count) ☆ ... Historical (\$) ☆ ... Sponsor Summary ☆ ...

## 2. How to use/navigate the report (continued)

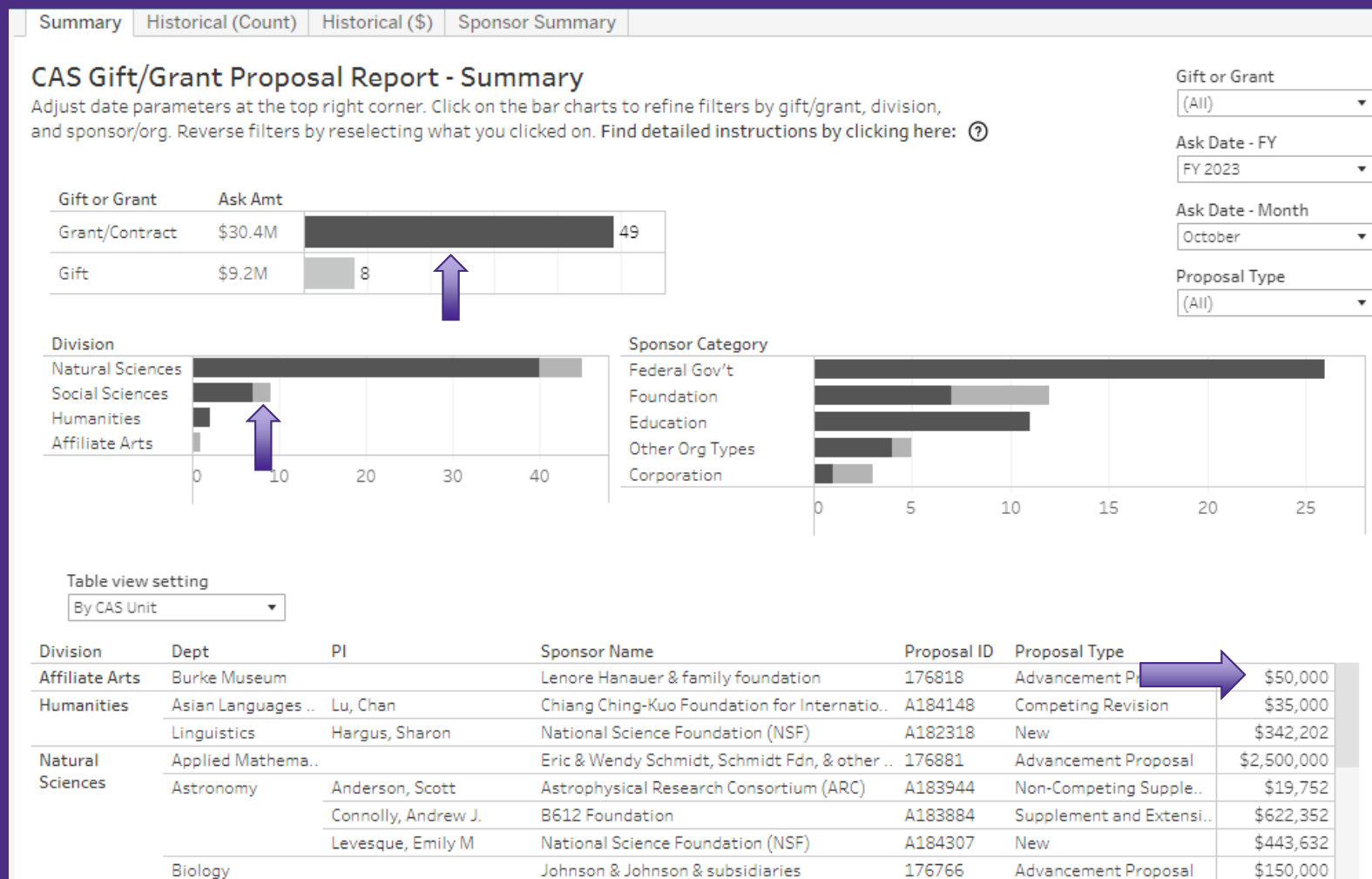
- > **Summary Page:** A quick overview of submitted proposals. The bar charts show the # of proposals submitted, by proposal type, division, and sponsor type.
- > **The table in the bottom half** shows the actual proposals that comprise the bar charts.
- > **You may revise the date parameters** using the dropdowns as noted below:



Dropdown filters

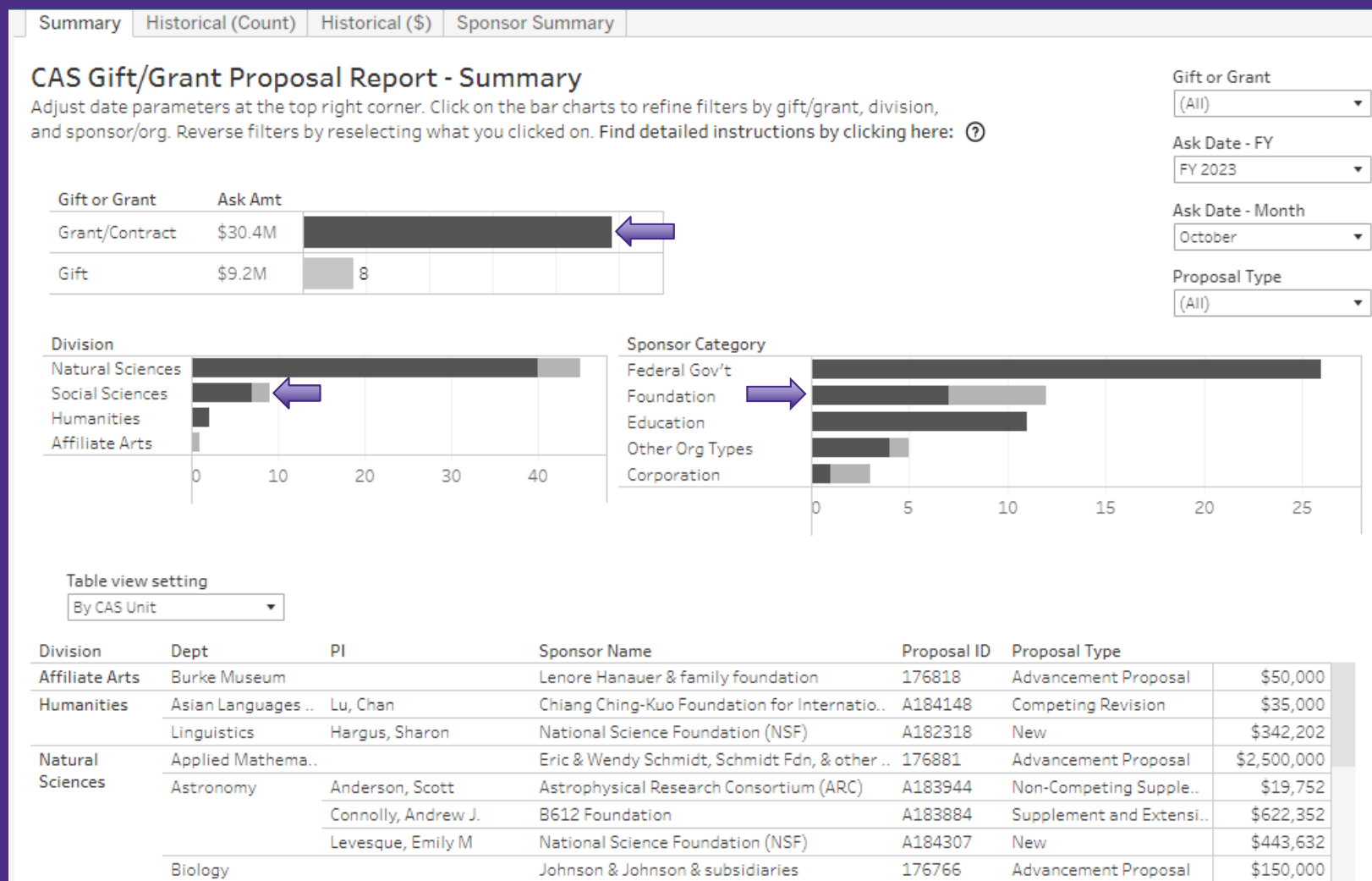
## 2. How to use/navigate the report (continued)

- For the charts, you can hover-over the chart elements to see further details. Similarly, for the tables, you can hover-over the right-most column to see additional details.



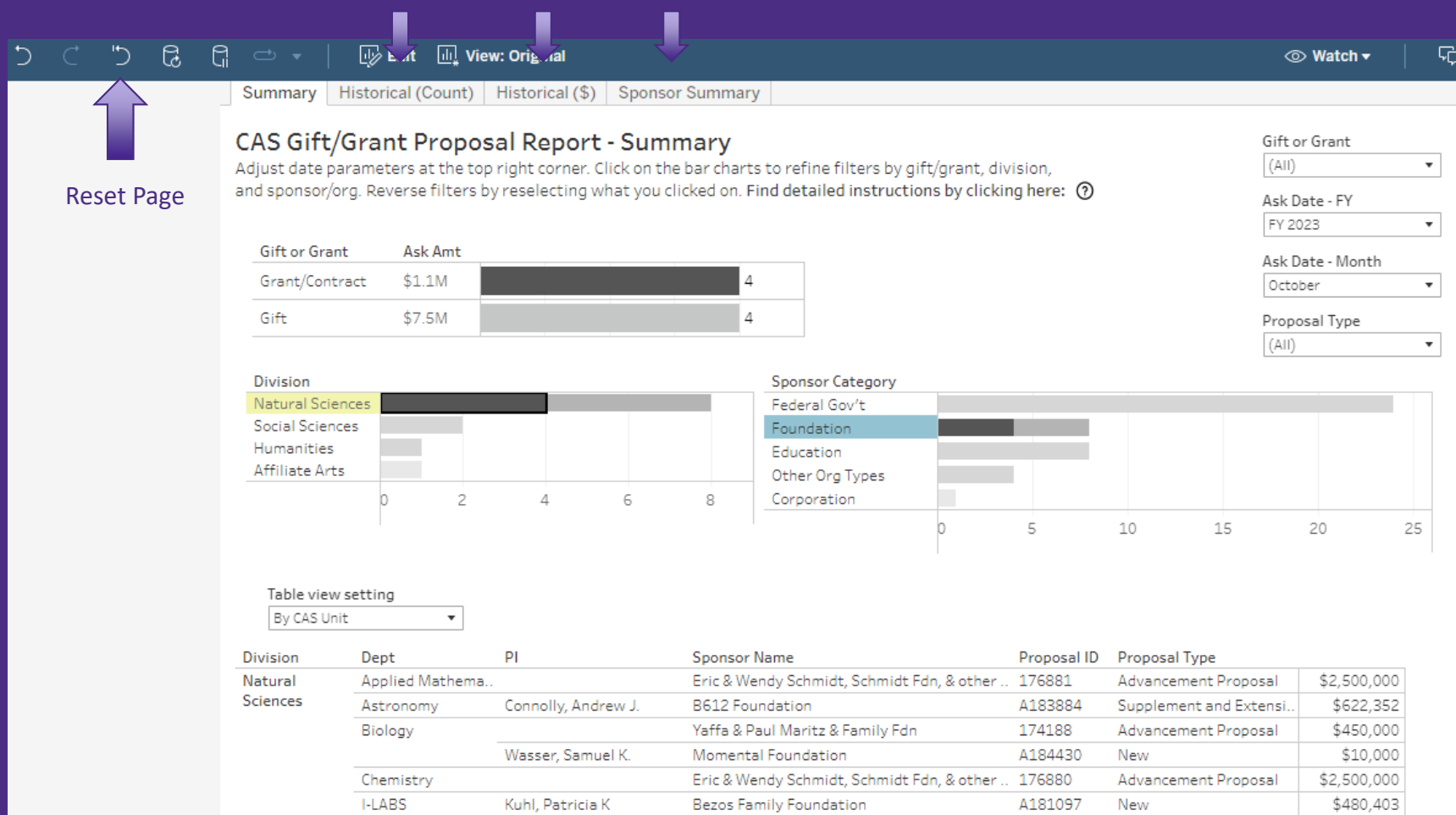
## 2. How to use/navigate the report (continued)

- > You may also dynamically apply filters by clicking on the bar chart segments you are interested in. This will adjust the rest of the report page.
- > This allows you to see the *grant* proposals a *division* submitted to a specific *sponsor type*, and the bottom table will reflect your filters.



## 2. How to use/navigate the report (continued)

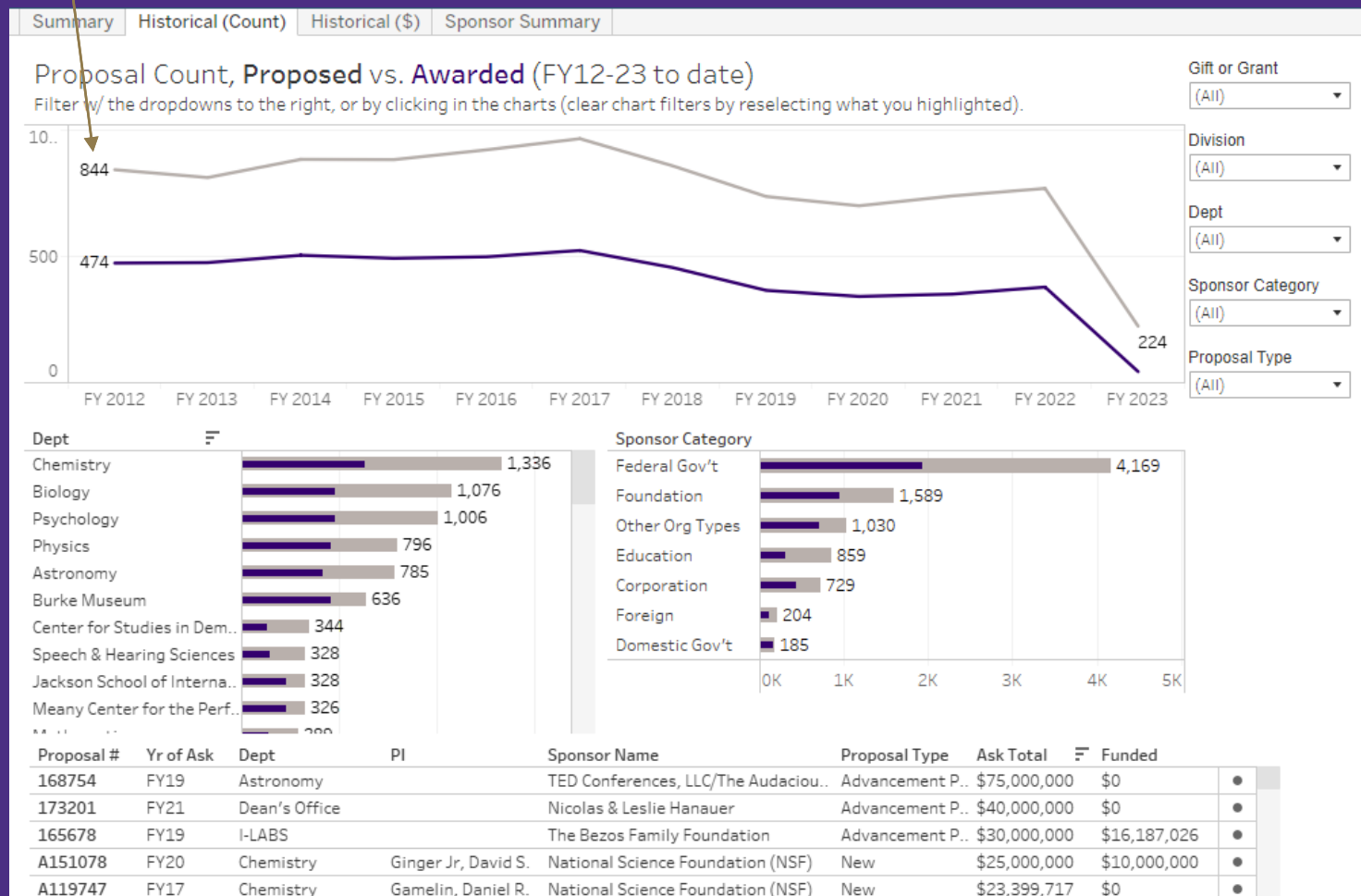
- > To undo filters, you must reselect the chart segments that you highlighted. (This can be finicky).
- > If you get stuck undoing filters, select the “reset view” icon, which restores the page to default.
- > You can also navigate to the other report pages using the tabs along the top.





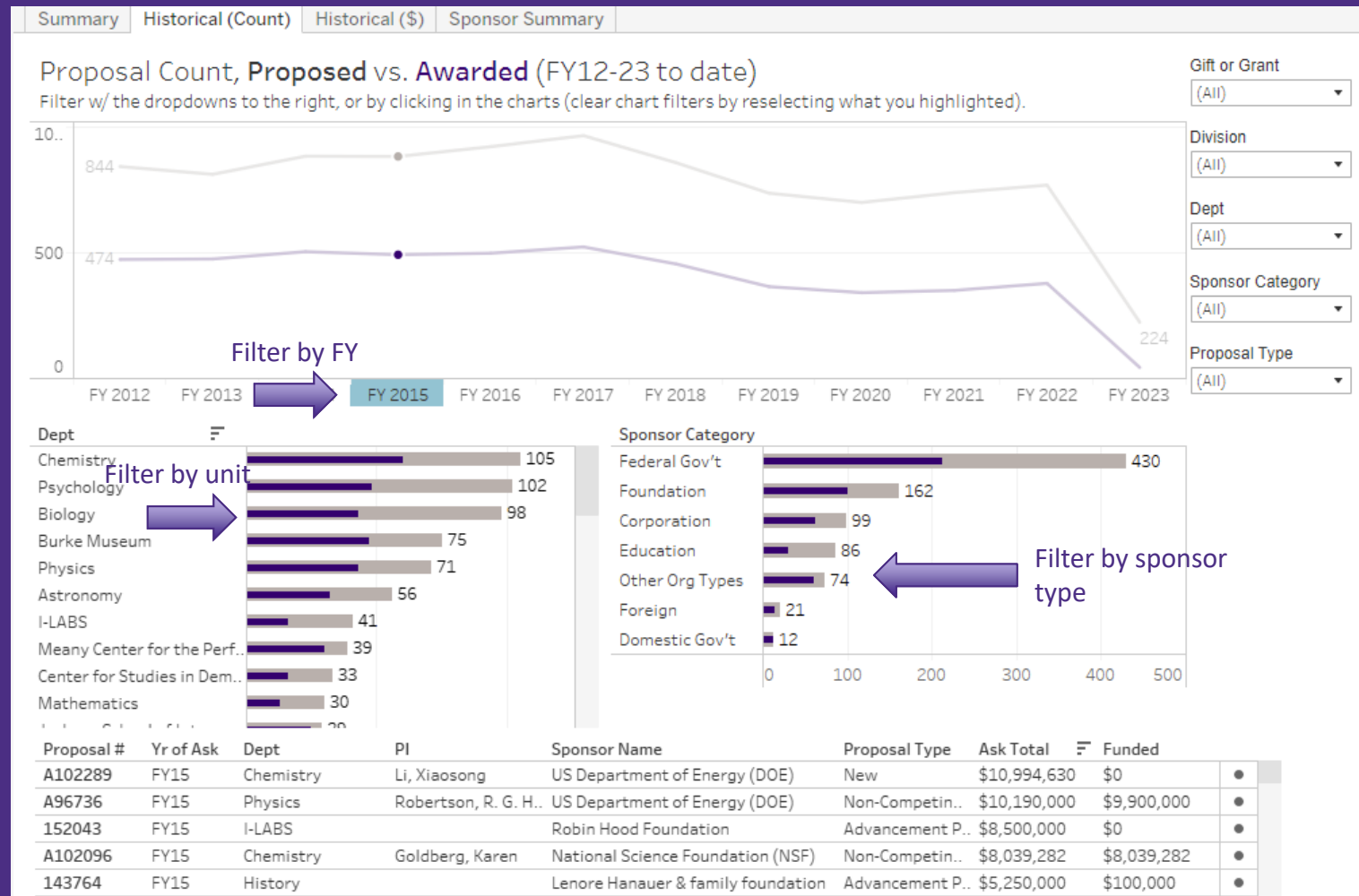
## 2. How to use/navigate the report (continued)

- > The Historical views show proposal trends over time. The total number of proposals is represented in gray, while purple represents the proposals that have been marked as awarded. You may filter the entire page by specific FY's, by clicking on the desired FY on the x-axis.
- > Here, 844 proposals were submitted in FY12, and 474 of those were awarded.



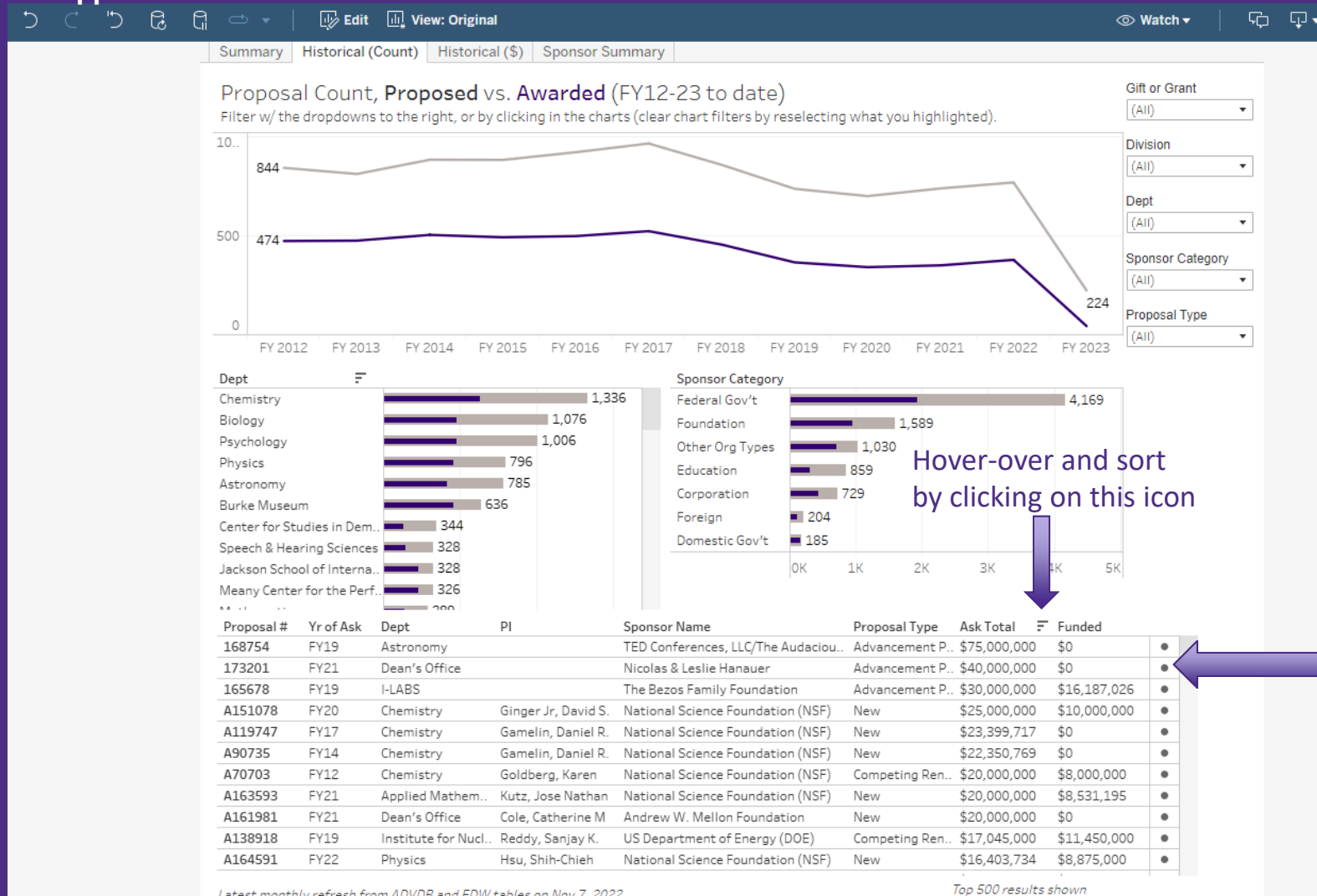
## 2. How to use/navigate the report (continued)

- > As with before, you may apply filters with the dropdowns to the right, or by clicking on the charts. Clicking on the charts will dynamically apply to the rest of the report.
- > For example, if you select *FY12*, the rest of the report will now reflect only *FY12* proposals. You could further filter by *unit* or *sponsor type*, and the charts and table will all update accordingly.



## 2. How to use/navigate the report (continued)

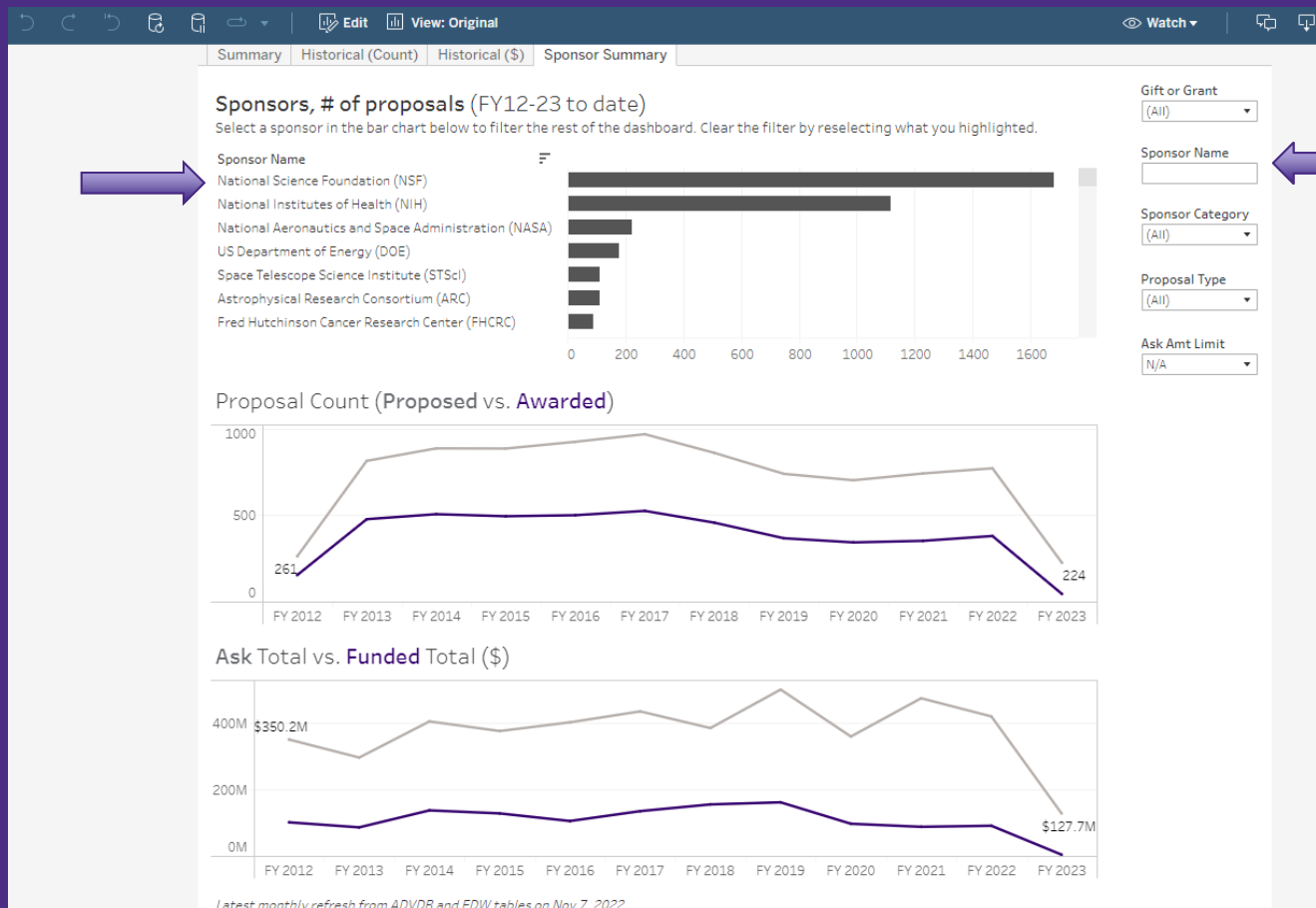
- > To see proposal titles, you can hover-over the bullets in the right-most column of the table.
- > You may also sort table columns by hovering over the column and clicking on the sort icon that appears.



## 2. How to use/navigate the report (continued)

- > The Sponsor Summary page shows all proposals submitted to specific sponsors over time. This lets you see where many of our proposals are going, as well as understand how many of those get awarded.
- > Click on a sponsor name in the bar chart to filter the rest of the report.
- > Note that this page has a sponsor name filter, where you can type in a partial string of text (e.g. "NIH" or "department of")

Select a sponsor to filter the line graphs below



Sponsor name search filter

### 3. Report Caveats

---

1. When a proposal is marked as awarded, the proposal will still show up on the FY that it was submitted through OSP, not awarded.
  - a) For example, proposals from FY23 may get *awarded* in FY24. This report reflects those awarded proposals in FY23, since the focus of this report is proposal output.
  - b) This means the most recent year may show a lower awarding rate, since not all of those proposals have been reviewed and awarded by sponsors.
  - c) This will not match the numbers of the Office of Research's Annual Report, since that lists proposals and awards in the years they were submitted and awarded, respectively.
2. This report merges data from OSP and Advancement. The two datasets do not always match perfectly.
  1. For example, Advancement uses different sponsor/organization types than OSP, and they don't include PI information. We have used our best judgment to align differing fields.
  2. Data duplications may exist, where units submitted proposals via Advancement as well as OSP. For these, we have had to manually search for Advancement-side proposals to exclude. Let us know if you find any we may have missed.
3. This report is manually updated monthly. Please note that Financial Transformation and Tandem CRM release will impact updates.



## 4. Questions or Feedback?

---

1. Please reach out to Advancement Services at [casadser@uw.edu](mailto:casadser@uw.edu). You may also directly contact the report author (Mike Lee) at [mml84@uw.edu](mailto:mml84@uw.edu).
2. As-is, the report is fairly broad and basic, since we don't know how you would use the information or what questions the report may prompt. We'd love to hear your feedback, as we consider future updates.

