

These Tips & Tricks are targeted at those who wish to build their own queries in Business Objects using the RS02 Proposal Management Data Set.
Pay Special Attention to the "Query Filters Needed to Prevent Data Duplication" column of the right. You will need to include as a query filter to achieve one unique result.

Tip Categories & Individual Tips	Query Filters Needed to Prevent Data Duplication
NAMING CONVENTIONS	
Proposal Management Budget refers to data that was "Proposed" (in contrast to what was Awarded or Committed)	
When choosing dollar fields from the Proposal Management Award, Commitment or Budget detail:	
Dollar fields from the sponsor will have the term "Sponsor" or "Spon" (i.e. Commit Spon IDC Total)	
Dollar fields from UM Cost Share will have the term "UM CS" (i.e. Commit UM CS IDC Total)	
Dollar fields with neither of these terms (i.e. Commit IDC Total) generally refer to sum of the "Sponsor" + "UM CS".	
When choosing fields related to Direct and Prime sponsors:	
Direct sponsor fields will have the term "Sponsor"	
Prime sponsor fields will have the term "Prime"	
"Research Activity" a.k.a." Factor Codes"	
Prpsl Person Role v Prpsl Sponsor Role v Sponsor Role	
There are multiple fields that have similar names or, in the case of Dept Grp, are exactly the same, but can yield different results. Before adding a field or running your query, you can check a field by dragging it into the Query Filters area and checking the field's list of values, or checking the path of the field by hovering over it in the Results Objects area.	
PERSON ROLES (Prpsl Person Role)	
There is at least one UM PI on every proposal. Select NIH proposals are the only ones currently authorized to have multiple UM Principal Investigators, but there is no requirement in the system to prevent entry of multiple UM PI's. In the case where more than one UM PI has been entered, the system does require one of the UM PI's to be recognized as the Contact PI. To return a unique list of results, under Proposal Management - Prpsl Personnel, choose the <i>Prpsl Person Role</i> = UM Principal Investigator only and the <i>Prpsl Contact PI IND</i> = Y.	X
For all non-NIH proposals or NIH without allowable multiple PI proposals, faculty other than the one UM PI should be listed as Participating Investigators with/without Specified Effort.	
The UM Sponsor Principal Investigator = Applicant on the proposal who is not UM PI eligible (i.e. student, house officer). Generally the UM Sponsor PI's mentor serves as the UM PI.	
The UM Sponsor PI person appointment department was not collected in PRISM, so this field will be blank for all archived data.	
There is no Rsr Prpsl Bd Per ApptDeptID for persons in the role of Administrative Contact as this data is not collected in eRPM. Use the Prpsl Admin Home DeptID.	
DEPARTMENT AND SCHOOL/COLLEGE FIELDS	
There are multiple field choices when running a query by Department or adding a Department results field. Each Department field has a related School/College field named Dept Grp. To get the right combination of Department and School/College, you must choose the <i>Dept Grp</i> from the appropriate table. The most frequently used Department and School/College fields are described below.	
<i>Person Appointment Department</i>	
The Person Appointment Department is the department or departments entered for an individual on the PAF at the time of proposal submission. This is the field used in the prompt for RS02 PM repository queries.	
Department = Proposal Management - Prpsl Personnel - Rsr Prpsl Mgt Personnel Cost - Rsr Prpsl Bd Per ApptDeptID (or Rsr Prpsl Bd Per ApptDeptdescr)	
School/College = Proposal Management - Prpsl Personnel - Rsr Prpsl Mgt Personnel Cost - Dept Grp (or Dept Grp Descr)	

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Proposal Administrative Home Department	X
The Administrative Home of the Proposal is the same for all personnel on the project.	
Department = Proposal Management - RSR Proposal - Prpsl Admin Home DeptID (or Prpsl Admin Home Dept Descr)	
School/College = Proposal Management - Dept Grp (or Dept Grp Descr)	
Person Administrative Home Department	
The Administrative Home of the Person is the primary appointment of an individual and not necessarily related to the proposal in any way (i.e. emeritus professors may have an administrative home of <i>Benefits Pool</i>).	
Department = Proposal Management - Prpsl Personnel - Personnel Rsrch Proj Per - Person Rsr DeptID (or Person Rsr Dept Descr)	
School/College = Proposal Management - Prpsl Personnel - Prpsl Personnel Rsrch Proj Per - Dept Grp (or Dept Grp Descr)	
NOTE: All RS02 PM queries return both the Person Appointment Department/School/College as well as the Proposal Administrative Home Department/School/College.	
SPONSORS	
Like Person Roles, there are various roles a sponsor can play on any given proposal. Sponsor Roles include Direct, Prime, Intermediate, Co-Funding Direct and Co-Funding Prime.	
Based on the information collected in section 1.12 of eRPM, DRDA enters the appropriate sponsor code and sponsor role. The sponsor code links a PAF to the sponsor table (<i>Prpsl Project Sponsor Tbl</i>) that houses high-level information about the sponsor such as the Sponsor Group (i.e. Foreign Industry, DHHS) and Sponsor Class (i.e. All Federal, All Foundations). The sponsor contact information in this table may or may not reflect the same information collected under as the sponsor contact information for a specific PAF.	
When including data from the <i>Prpsl Project Sponsor Tbl</i> - the "!Sponsor Effective Date Options:" prompt will automatically appear. Choose the "CURRENT ROW" option.	
If you need only the name of the Direct and/or Prime Sponsor to display, under Proposal Management - Rsr Proposal, select the <i>Prpsl Direct Sponsor Name</i> and/or <i>Prpsl Prime Sponsor Name</i>	X
If you want to include detailed information about the Direct and Prime sponsor (besides the name) and you would like it to display on the same results line, use the Crosstab function to build your query or your data may duplicate.	
HARDSHIPS, PRE-PROPOSALS, PAF SNAPSHOTS ("-OR")	
An original or "-OR" snapshot of a PAF is taken at the point the PAF transitions to the state of Submitted to Sponsor. This snapshot exists only in the data warehouse, available only for proposals that were completely electronically processed in eRPM. No snapshots are taken of pre-proposals. All data related to the snapshot has a PAF number suffix of "-OR" and can be identified by the <i>Prpsl_Archive_Ind</i> (details below).	
Hardships and Pre-proposals have their own process flow and exist outside of the PAF. Each has its own DRDA number that is different from the associated PAF.	
Hardships have their own set of states much like that of a PAF.	
A Pre-proposal will move to TD, WD or Invited for Full Proposal.	
NOTE ON UM COST SHARE INDIRECT COSTS	
In PRISM, UM CS IDC was collected under one fictional department code of 000002. Due to this practice, the data was unable to be separated at the time of data migration. In eRPM, the UM CS IDC can be entered on the same ITEM line as the UM CS DC. This enables us to collect/report data specific to department codes.	
SEARCH FIELDS	
There are several search fields in RS02 PM that can be used to search text fields. Search fields remove the problem of case sensitivity when dealing with text fields. The Search fields should be used with the operator "Matches pattern" along with your CONSTANT all in upper case and surrounded by the wildcard % sign.	
For example, to search for proposals related to Japan add the following Query Filters:	
a) <i>Prpsl Title Srch</i> Matches pattern %JAPAN%	
OR b) <i>Prpsl Keyterm Srch</i> Matches pattern %JAPAN%	

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OR c) <i>Non UM Location Descr255 Srch</i> Matches pattern %JAPAN%	
PROPOSAL ARCHIVE INDICATOR (Prpsl Archive Ind)	
Archived data refers to two data set types. The first data set in the archive is all of the PRISM data that was not migrated to eRPM. These were all proposals Turned Down, Withdrawn or Closed before Dec 2005. The second data set in the archive is the PAF snapshot taken at the point a proposal transitions to the state of Submitted to Sponsor. All data related to the snapshot has a PAF number suffix of "-OR". The Prpsl Archive Ind is found on all tables if you wish to exclude archived data or review only archived data.	
All RS02 PM repository queries exclude the archived proposal snapshot ("XX-PAFxxxx-OR") by adding the Query Filter: <i>DRDA Nbr</i> Different from pattern %OR%	X
Additionally, all RS02 PM repository queries exclude Pre-Proposals ("XX-PRExxxx") by adding the Query Filter: <i>DRDA Nbr</i> Different from pattern %PRE%	X
OTHER FIELDS TO KNOW	
Proposal Management - Rsr Proposal - Prpsl Initial Submit Dt	X
There can be multiple submissions of a single proposal. This field returns the first date the proposal was submitted.	
Proposal Management - Rsr Proposal - Prpsl Awd Publish Date	
The date DRDA recognizes an agreement has been reached between UM and the sponsor(s) and the award is publishable. After the nightly upload, the award will display on the Sponsored Awards on the Web (SAW) website.	
Proposal Management - Rsr Proposal - Prpsl Awd Publish Ind	
An indicator field related to the Prpsl Awd Publish Date.	
Proposal Management Commitment - Prpsl Commitment Dtl - Prpsl Sponsor Award Ref Nbr	
This field returns the full award reference number of the Direct Sponsor for a Commitment. For PHS projects, this field combines all segments of the award reference number that can otherwise be displayed one segment at a time.	
Proposal Management Commitment - Prpsl Commitment Dtl - Prpsl Prime Award Ref Nbr	
This field returns the full award reference number of the Prime Sponsor for a Commitment. For PHS projects, this field combines all segments of the award reference number that can otherwise be displayed one segment at a time.	
Proposal Management - Prpsl Sponsor Prog Type	
Sponsor Program Types are identified by DRDA. This field is used to identify certain characteristics of projects that cannot be easy identified through the sponsor code, the award reference number or any other regular field (i.e. ARRA = American Recovery and Reinvestment Act).	
<i>Indicator Fields</i>	
Proposal Management Commitment - Prpsl Commitment Dtl - Commit Current Ind = Most Recent Commitment (see repository query notes).	
Proposal Management Commitment - Prpsl Commitment Dtl - Rsr Prpsl Project Grant Comit - Commit Primary Proj Grant Ind = Most Recent parent p/g (see repository query notes).	
Proposal Management Research Activity - Prpsl Section Rsrch Actv - Hum Rsr Ind = Human Subjects use on proposal	
Proposal Management Research Activity - Prpsl Section Rsrch Actv - Animal Subject Ind = Animal use on proposal	
TIME SAVER	
in Edit Mode, change the property of the Prompts to "Keep Last Value"	