eData Faculty User Manual

REV 13/09/20

eData Faculty User Manual
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Faculty Fact Sheet: WebFM to eData Crosswalk

This table shows the Sponsored Programs Financial menu items in WebFM and their eData equivalent.

Now: WebFM	New: eData Reporting	How to Navigate
Sponsored Programs Financial Report	Sponsored Programs Financial Reports: SPA Financial Report	After logging into eData, 1. Click **Financial Reporting** 2. Click **Here** for **SPA Financial Reports** 3. Enter your **Account number**, Click **Select/Run**. You are viewing the SPA Financial Report.
Sponsored Programs Financial Report Account Totals	Sponsored Programs Financial Reports: SPA Financial Report	After logging into eData, 1. Click **Financial Reporting** 2. Click **Here** for **SPA Financial Reports** 3. Enter your **Account number**, Click **Select/Run**. 4. Select different reports (such as Account Totals Since Inception or Account Totals by Month)
Sponsored Programs Award Bdgt Browse Award Budgets	Award Budget Browse	After logging into eData, 1. Click **Financial Reporting** 2. Click **Here** for **SPA Financial Reports** 3. Enter your **Account number**, Click **Select/Run**. 4. Click the underlined blue link titled **Budget Browse**.
Sponsored Programs Award Listing	Sponsored Programs Financial Reports: Account Listing	After logging into eData, 1. Click **Financial Reporting** 2. Click **Here** for **SPA Financial Reports** 3. Enter your **Account number**, Click **Select/Run**. 4. Select the underlined blue link report titled **Account Listing.**
Sponsored Programs Award Summary	Sponsored Programs Financial Reports: Account Overview	After logging into eData, 1. Click **Financial Reporting** 2. Click **Here** for **SPA Financial Reports** 3. Enter your **Account number**, Click **Select/Run**. 4. View the **report header** or click **Account Overview.**
Sponsored Programs Class Tot by Bdgt Cd	SPA Object Reports: Trans by Reports To, Level and Object	After logging into eData, 1. Click **Financial Reporting** 2. Click **Here** for **SPA Object Reports** 3. Click **“Indirect Cost – 0631”** under the **Object** heading**.**
Sponsored Programs EASE Summary	Sponsored Programs Financial Reports: EASE Summary	No equivalent; this report will remain in WebFM. A link to this report is available in eData: 1. Click **Financial Reporting** 2. Click **Here** for **SPA Financial Reports** 3. Enter your **Account number**, Click

Faculty Fact Sheet: WebFM to eData Crosswalk

Now: WebFM	New: eData Reporting	How to Navigate
		Select/Run. 4. Select the underlined blue link report titled **EASE Summary.**
Sponsored Programs **Indirect Cost Detail**	Sponsored Programs Financial Reports: SPA Financial Report	After logging into eData, 1. Click **Financial Reporting** 2. Click **Here** for **SPA Financial Reports** 3. Enter your **Account number**, Click **Select/Run**. View the report header for **indirect cost detail** on the SPA Financial Report.
Sponsored Programs **RMM IDC Distributn** **RMM IDC Summary**	RMM IDC Distribution	After logging into eData, 1. Click **Financial Reporting** 2. Click **Here** for **SPA Financial Reports** 3. Enter your **Account number**, Click **Select/Run**. 4. Select the underlined blue link report titled **RMM ICR Distribution Link**.
Sponsored Programs **Terms & Conditions**	Award Detail, Terms & Conditions	After logging into eData, 1. Click **Financial Reporting** 2. Click **Here** for **SPA Financial Reports** 3. Enter your **Account number**, Click **Select/Run**. 4. Select the underlined blue link report titled **Account Overview.**

How to Log In and Out of eData Job Aid

Purpose: The purpose of this job aid is to help you log in and out of eData. In this aid, you will find information regarding:

- Supported Browsers for eData
- How to Log In to eData
- How to Log Out of eData

Supported Browsers for eData

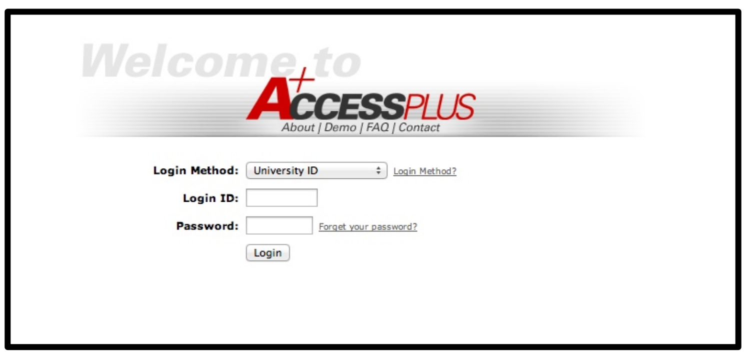
Use one of the following browsers to log into eData.

- Internet Explorer 9 or up
- Firefox 12
- Safari 6 or up (optional for Macs)

How to Log In to eData

Follow the numbered steps to get to the **eData** screen.

1. Open **Internet Explorer** or **Firefox**.
2. Navigate to www.accessplus.iastate.edu
3. Enter your **University ID** and **Password** to log into **AccessPlus**.

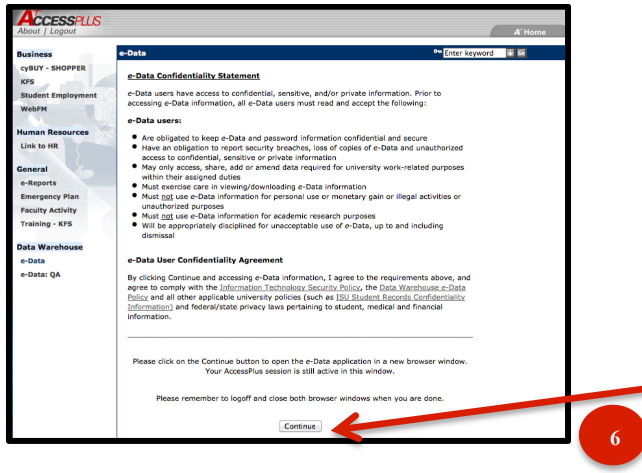


4. Click on the ***u*Business** tab on the far right of this screen.

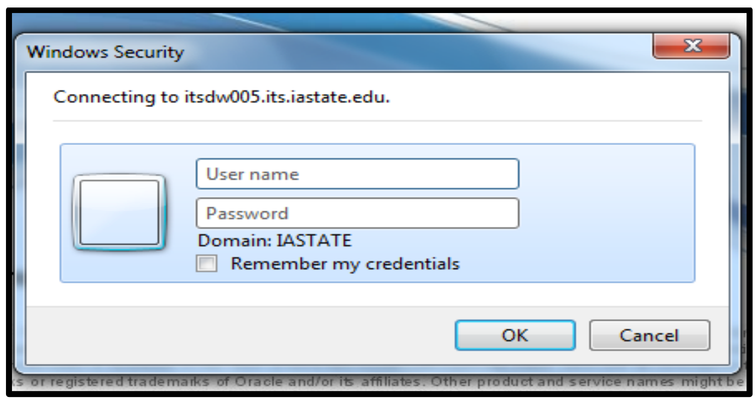
How to Log In and Out of eData Job Aid

5. Click **eData** under the **Data Warehouse** menu item on the left.

6. Click **Continue**.



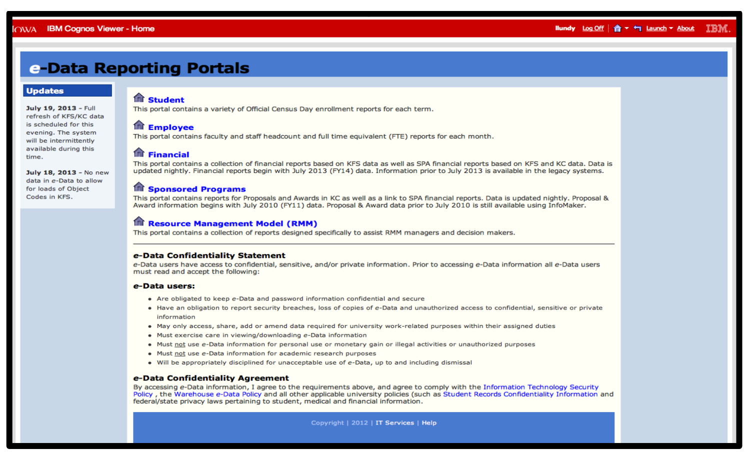
6a. If you receive this prompt enter your **ISU Email Address** and **Password** then; click **OK** to enter the **eData Reporting Portals** screen.



7. Click the appropriate **Reporting Portal** to begin viewing reports in **eData**.

   Portals (written in blue) include:
   - Student
   - Employee
   - Financial
   - Sponsored Programs
   - Resource Management Model

Note: For training purposes, we will be using the **Financial** and **Sponsored Programs** portals only.



How to Log In and Out of eData Job Aid

How to Log Out of eData
Tabs in AccessPlus will remain open while you work in eData. When you are done working on reports, follow the numbered steps to safely log out of the **eData** and **AccessPlus**.

1. Close all open eData tabs.
2. Click **Log off** in the red area on the top right of the **eData** screens.

3. Logout of **AccessPlus**.
4. Close the tab and browser.

Understanding the eData Interface Job Aid

Purpose: The purpose of this job aid is to help you understand the **eData Interface**. This job aid will provide an overview of tools and visual cues for navigating the eData screens. In this job aid, you will learn about:

- eData Reporting Portal Descriptions
- Graphic Summary Screen
- Selection Page
- Portal and Report Titles
- Map: Financial Reporting Portal
- Map: Sponsored Programs Reporting Portal
- Report Filters
- Report Details
- Other Portal Links and Report Options
- Export Options

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eData Reporting Portal Descriptions

When you first click **Continue** to open **eData** from **AccessPlus**, you will see the blue homepage.

Understanding the eData Interface Job Aid

eData is made up of reporting portals that allow you to access information based on your selection. The five main portals include the:

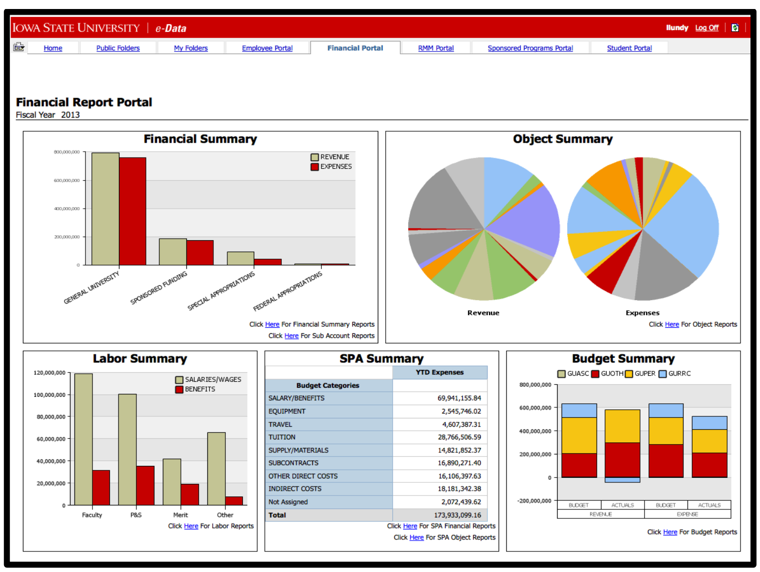
Portal Titles	Description
Student	This portal contains a variety of Official Census Day enrollment reports for each term.
Employee	This portal contains faculty and staff headcount and full time equivalent (FTE) reports for each month.
Financial	This portal contains a collection of financial reports based on KFS data as well as SPA financial reports based on KFS and KC data. Data is updated nightly. Financial reports begin with July 2013 (FY14) data. Information prior to July 2013 is available in the legacy systems.
Sponsored Programs	This portal contains reports Proposals and Awards in KC as well as a link to SPA financial reports. Data is updated nightly. Proposal & Award information begins with July 2010 (FY11) data. Proposal & Award data prior to July 2010 is still available using InfoMaker.
Resource Management Model (RMM)	This portal contains a collection of reports designed specifically to assist RMM managers and decision makers.

Graphic Summary Screen

Once you select the **Financial Report Portal** from the blue homepage, a graphic display of five boxes appear and contains seven types of **eData** reports within the portals:

- Financial Summary Reports
- Sub-Account Reports
- Object Reports
- Labor Reports
- SPA Financial Reports
- SPA Object Reports
- Budget Reports

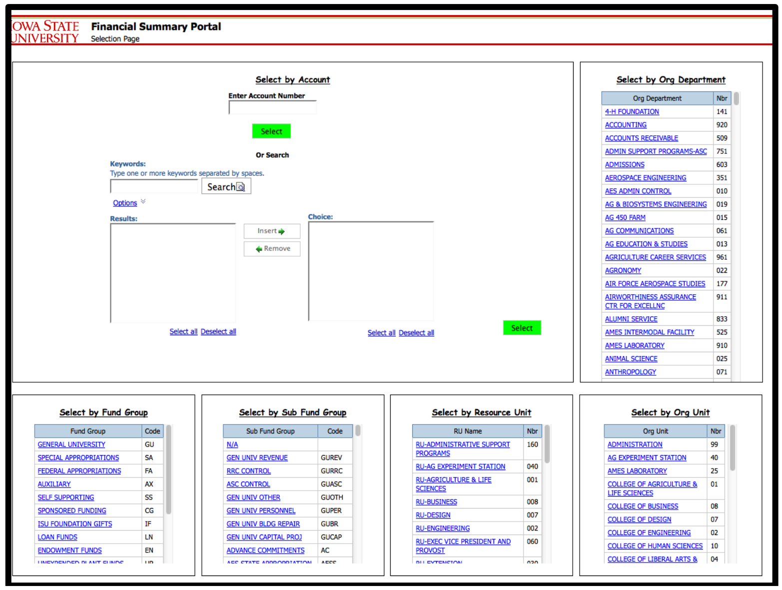
These portals allow you to access and display information in different views.



Understanding the eData Interface Job Aid

Selection Page

Each portal contains a **Selection Page**, where you can select and search for data by accounts, keywords, fund groups, sub fund groups, resource units, org units, or org departments.

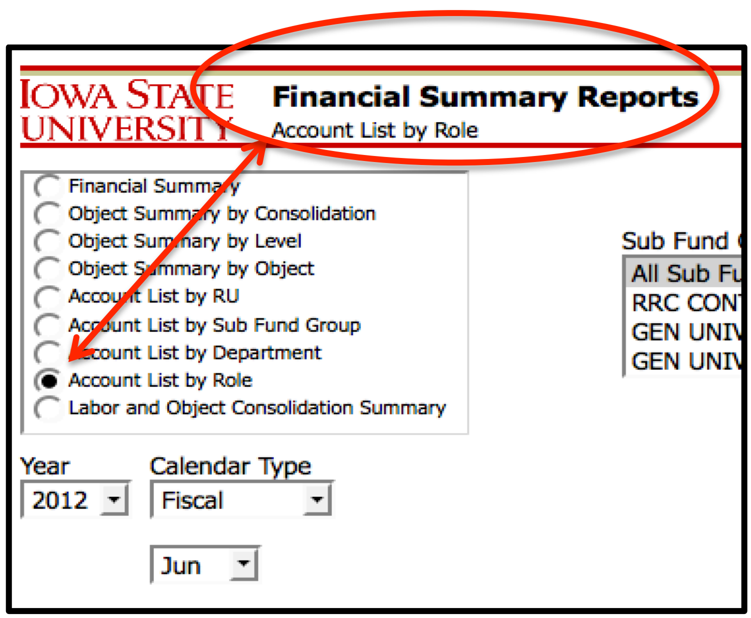


Portal and Report Titles

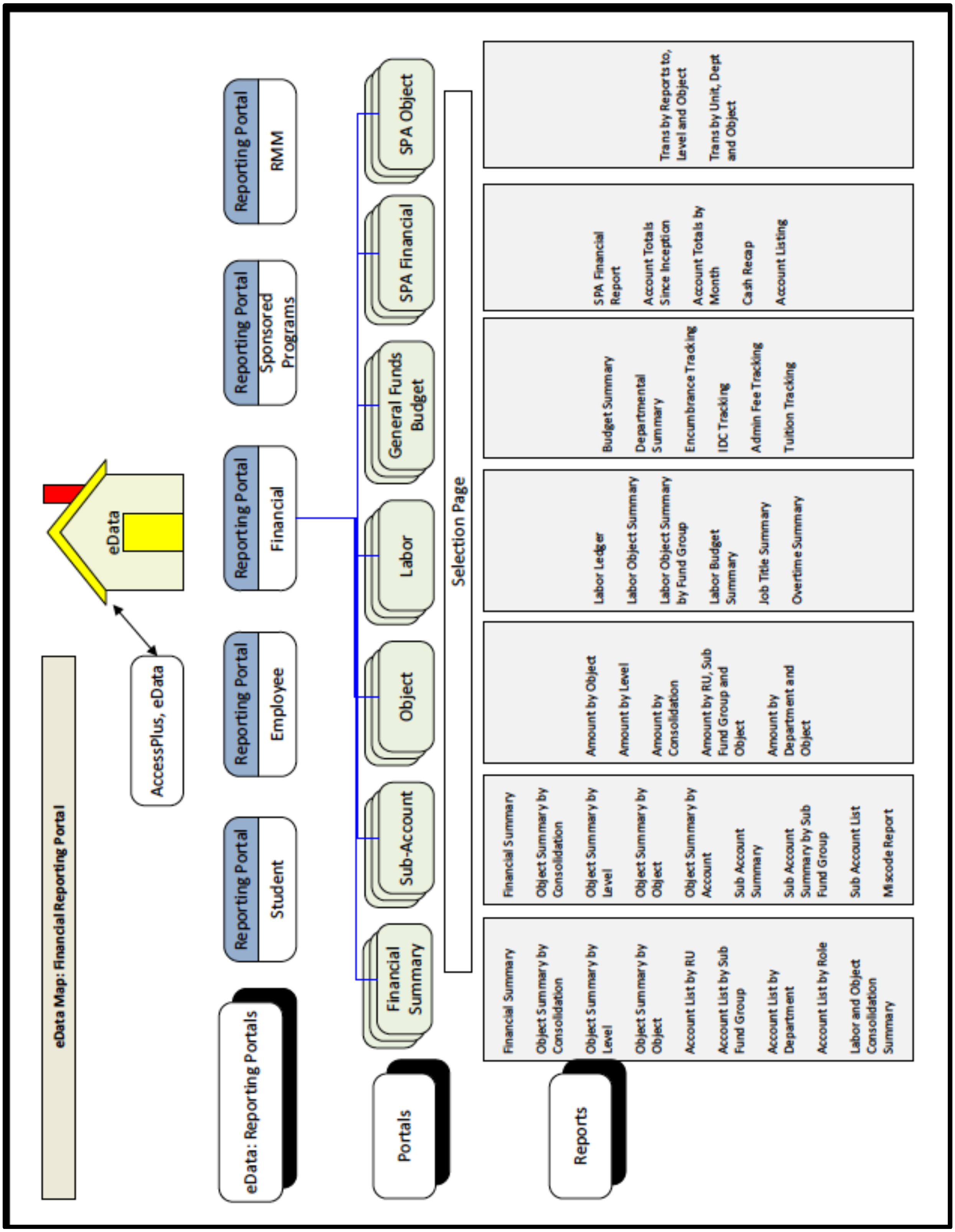
Each screen has a **Portal Title** displayed at the top in bold.

Directly underneath the **Portal Title** you will find the **Report Title**. These titles correspond to the menu or **Report List** on the top left side of the screen. By clicking one of the radio buttons on the **Report List**, you can select and generate that report.

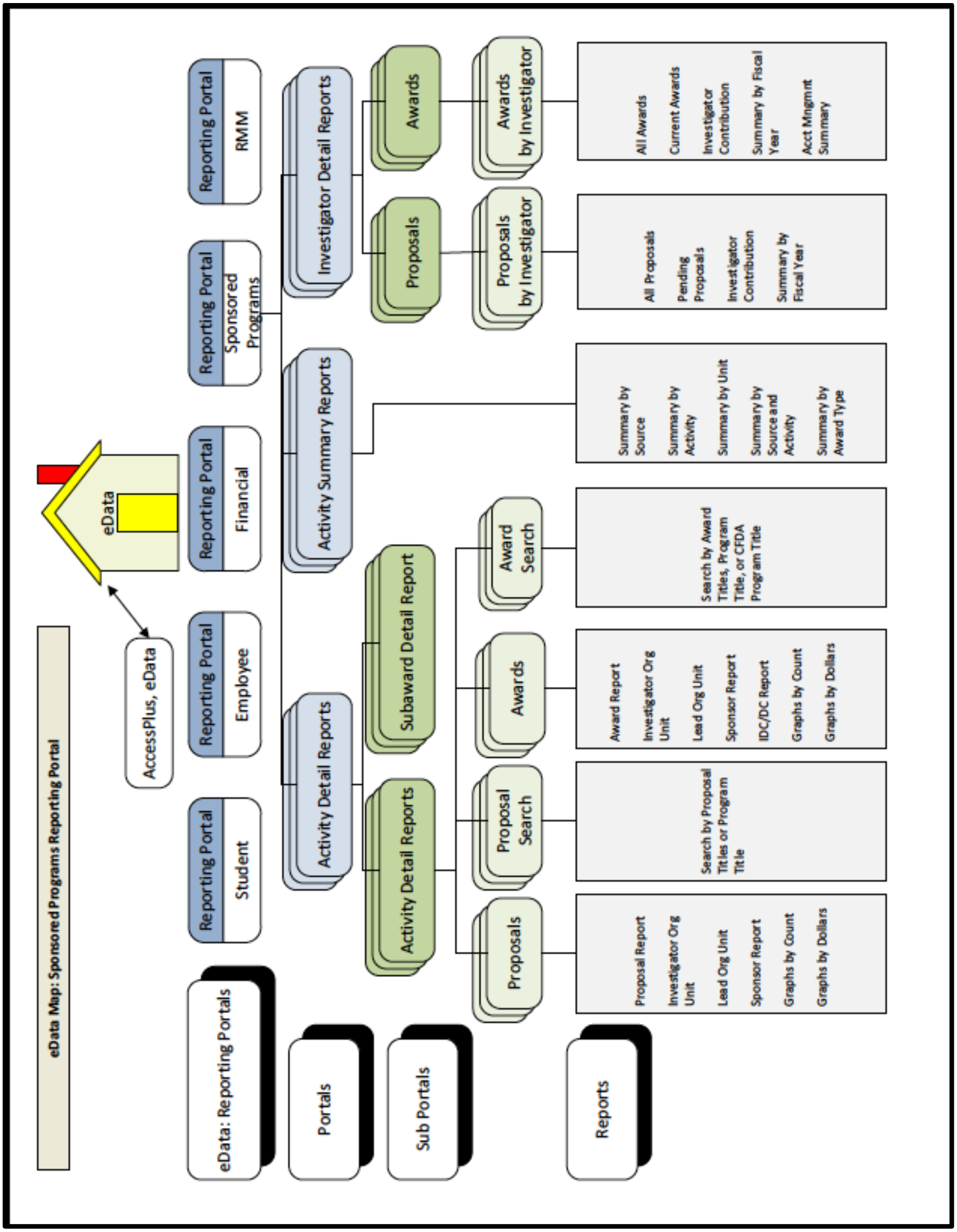
The maps below illustrate each portal and corresponding report available in **eData**.



Understanding the eData Interface Job Aid



Understanding the eData Interface Job Aid



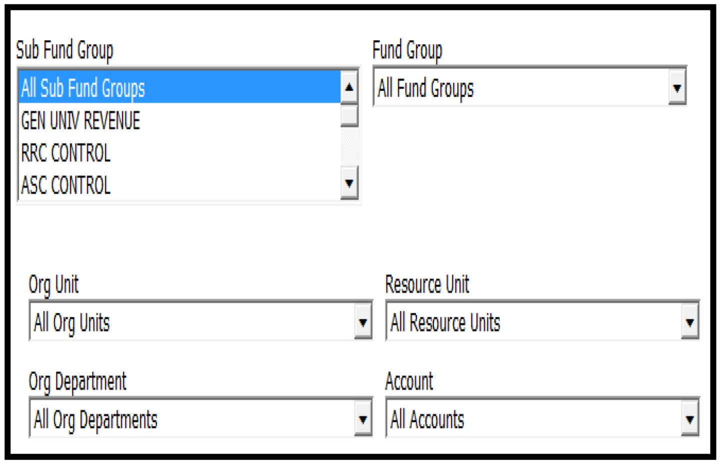
Understanding the eData Interface Job Aid

Report Filters

eData Portals contain prompts that allow you to filter information. The portals have different **Report Filters** each with drop down menus to create specific and detailed reports to meet your specific needs.

Here, you can filter information by any or all of the following:

- Sub Fund Group
- Fund Group
- Org Unit
- Org Department
- Resource Unit
- Account

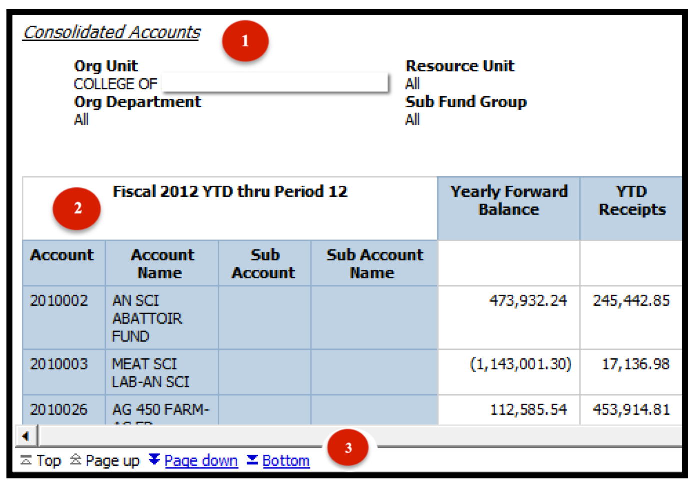


Report Details

The middle section of the screen displays your selections from the **Report Filters.**

At the bottom half of the screen, a report is displayed in table form.

To view all results, be sure to use the “Top”, “Page up”, Page down”, and “Bottom” prompts if these appear at the bottom left hand corner of the screen.



Understanding the eData Interface Job Aid

Other Portal Links and Report Options
Other report options are also available in most of the portals. These options appear as blue links and lead to:

- Other Portals
- Browse Lists
- Custom Reports
- Help
- Transaction Detail
- Account Overview
- Encumbrance Detail
- Pre-Encumbrance Detail

When you click a link to another **Portal**, information from the filters you already selected will be carried over.

Browse Lists allows you to choose a report from a drop down list of specific filters.

SPA Financial Portal
Object Portal
Sub Acct Portal
Budget Portal
Labor Portal

Browse Lists
Custom Reports
Help

Export Options
eData provides two download options on most reports: **EXCEL** or **PDF**. These options have specific advantages based on your business purpose. The table below lists the term and offers a description and visual cue for each option:

Term	Description	Visual Cue
Excel	Click the green Excel button to download the customized report to your desktop. This can be useful to further arrange, modify, or review the data.	Excel
PDF	Click the green PDF button to download the customized report to your desktop as a PDF. This can be helpful when communicating specific report results with others without any change in the data.	PDF

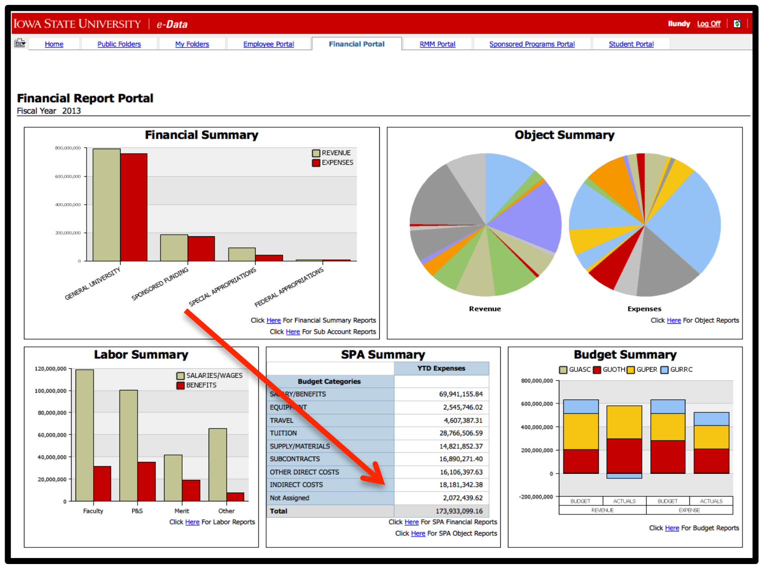
eData Faculty Guide: SPA Financial Portal

eData Financial Reporting has many portals with reports associated with accounting information and transactions at the university. There is group of reports specifically designed for sponsored programs account information called the **SPA Financial Portal**. This portal is updated daily and will be helpful to view balances, account totals, the budget, EASE Summary, ICR Distribution, and more.

Navigation: How to get there

Follow these steps to generate SPA Financial Reports.

1. Log into **Access Plus**, Click **UBusiness**, then **eData.**
2. Click **Financial Reporting** on the blue home screen.
3. Click **Here** for SPA Financial Reports.
4. Enter your **account number** (without dashes) and click **Select**, then **Run**.
    a. Alternatively, **search** for an account or click an **underlined blue link**.
5. You are now on the **SPA Financial Report** in the **SPA Financial Portal.**



> **TIP:** For more detailed information, go to the [Quick Reference Guide: Generating SPA Financial Reports](#).

SPA Financial Report

Description: View reports with information about Sponsored Programs accounts, inception to date expenses, and balances in each budget category. Especially useful if an award has re-budget requirements.
WebFM: Sponsored Programs, Financial Report

Account Totals Since Inception Report

Description: Shows inception to date expenses in each budget category as well as cumulative total revenue or expenses based on selected dates.
WebFM: Sponsored Programs, Account Totals, Monthly Incept-Date

eData Faculty Guide: SPA Financial Portal

Account Totals by Month Report

Description: Shows monthly totals in each budget category as well as monthly total expenses or monthly total revenue. A zero '0' in the field means total transactions net to '0'. A blank field means that there are no transactions for that budget category.

WebFM: Sponsored Programs, Account Totals, Monthly Periodic

Cash Recap Report

Description: Represents the "bottom line" of the report. Shows the totals from inception to current date for expenses and receipts, the current cash balance, and the percentage of funding spent. Offers an overview of accounts at-a-glance.

Account Listing Report

Description: Available when more than one account is selected. Shows the accounts that you have consolidated and allows you to sort the accounts in several ways.

WebFM: Sponsored Programs, Award Listing

Other Report Types

This table explains a second set of underlined blue links and drop down boxes found in the results section of the **SPA Financial Portal**. The table lists these report types, the legacy equivalent, and a description of the expected data results.

Report Type (Blue Links)	Description/Expected Data Results
Account Overview	Summarizes a selected account, its attributes, and related reporting codes.
Transaction Detail *WebFM: Transaction Detail*	The detail for a single account's transactions, including Tran Date, Description, Doc Type, Sub Accounts, etc.
Transaction Download	Download the transaction detail to Excel for the multiple accounts selected.
Encumbrance Detail *WebFM: Encumbrance*	Summarizes commitments of unpaid amounts for Payroll, Purchase Orders, Travel and Telecom for the single account selected.
Pre-Encumbrance Detail *WebFM: Account Detail, Departmental Commitments*	Summarizes the manually created commitments of unpaid amounts created by the user for the single account selected.
Budget Browse *WebFM: Award Bdgt Browse*	Shows each budget that has been entered for the selected account.

eData Faculty Guide: SPA Financial Portal

Report Type (Blue Links)	Description/Expected Data Results
RMM ICR Distribution *WebFM: RMM IDC Distributn*	Shows the Indirect Cost Recovery (ICR) distribution in percentage.
EASE Summary *WebFM: EASE Summary*	A link to the current Employee Activity Summary of Effort (EASE) report in WebFM.
Sub Account Summary	Shows a summary for all sub-accounts tied to the selected account.

For a full description of the SPA Financial Portal, please go to Report Help: SPA Financial Portal.

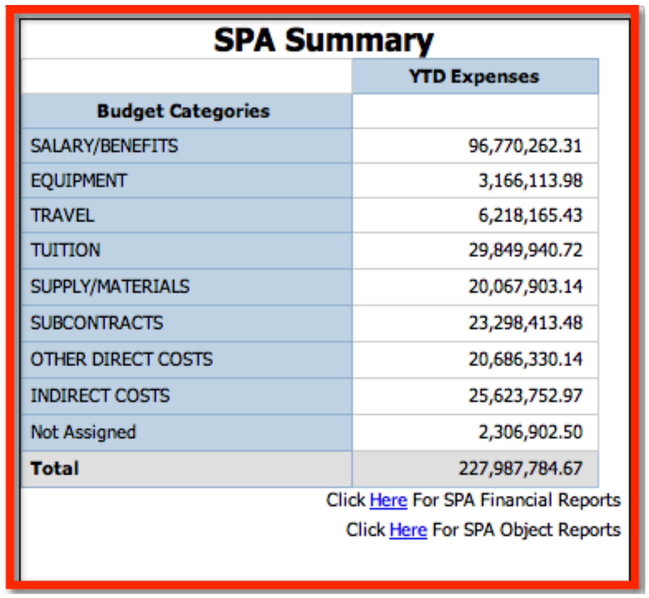
eData Faculty Guide: Budget Browse

Purpose: In this document, you will find information about the following topics:

- How to View the Budget Browse Link
- Create, Correct or Resubmit a Budget
- Budget Template Information

How to View the Budget Browse Link

To view the budget browse link, follow these instructions:

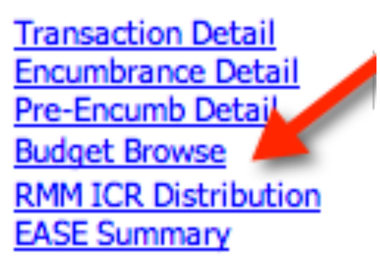


SPA Summary

Budget Categories	YTD Expenses
SALARY/BENEFITS	96,770,262.31
EQUIPMENT	3,166,113.98
TRAVEL	6,218,165.43
TUITION	29,849,940.72
SUPPLY/MATERIALS	20,067,903.14
SUBCONTRACTS	23,298,413.48
OTHER DIRECT COSTS	20,686,330.14
INDIRECT COSTS	25,623,752.97
Not Assigned	2,306,902.50
Total	227,987,784.67

Click Here For SPA Financial Reports
Click Here For SPA Object Reports

1. Navigate to **AccessPlus** in your web browser and enter your **University ID** and **password**.
2. Click on ***u*Business**, then **eData**, then **Continue**.
3. Click **Financial Reporting** on the blue homepage.
4. Click **Here** for **SPA Financial Reports** under the **SPA Summary graph**.
5. Enter an **Account Number** and then click the green **Select** button.
6. Click the **Run** button, which appears after you click **Select**.
7. Click **Budget Browse**, on the right side of the screen.
8. Select a date/budget on the **Award Budget Browse** screen to view the budget broken down by category.



Create, Correct or Resubmit a Budget

If you need to create, correct or resubmit a budget, use the Budget Templates provided by OSPA here: http://www.ospa.iastate.edu/forms/#budget.

eData Faculty Guide: Budget Browse

Budget Template Information

The budget information is collected from the OSPA budget templates, located at http://www.ospa.iastate.edu/forms/#budget. The Browse Budget format can be found on the last worksheet of the budget templates, on a locked tab titled "**BA Upload**". These fields are automatically pulled from the **Summary** and **Tuition** worksheets. There are a few exceptions, noted below.

BA Upload Line	Description	Data Fields
C21 on BA Upload	Printing/Copying Category	Populates from "Publication Cost" line on Summary Sheet
C19	Telecom Charges	Not Auto Populated. Instead, Change C89 to read "Telecom Charges" and contact your SPA Accountant.
C23	Postage	Not Auto Populated. Instead, Change C90 to read "Postage" and contact your SPA Accountant.

Quick Reference Guide: Generating SPA Object Reports

Purpose: The purpose of this guide is to assist you in generating **SPA Object Reports** in eData. For a full description of the reports and expected data results, please see **Reporting Help: Generating SPA Object Reports**.

SPA Object Reports include:

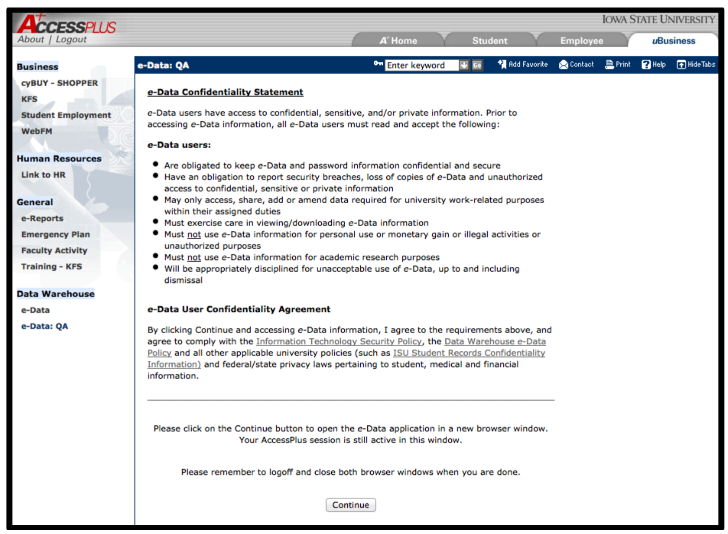
- Trans by Reports To, Level and Object
- Trans by Unit, Dept and Object

Instructions: Use the following steps to help you create a **SPA Object Report**.

1. Log into **AccessPlus** and enter your **University ID** and **Password**.

2. Click the ***u*Business** tab

3. Click **eData,** then **Continue**.



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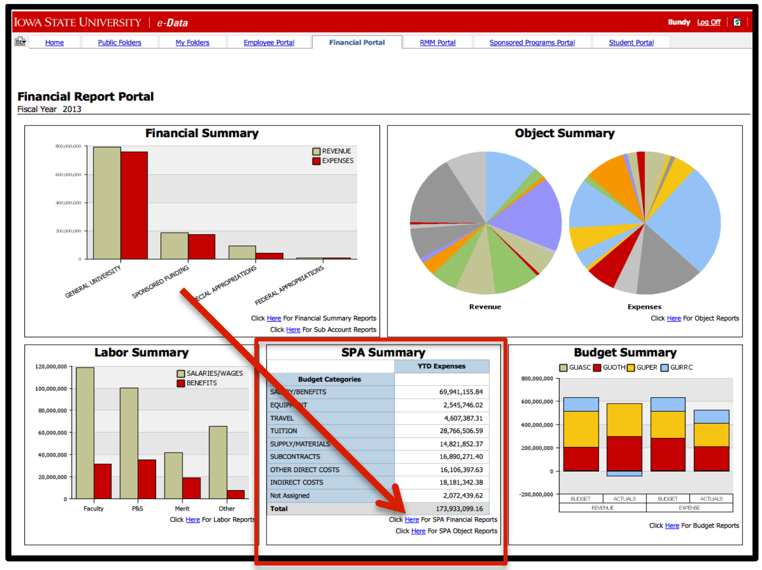
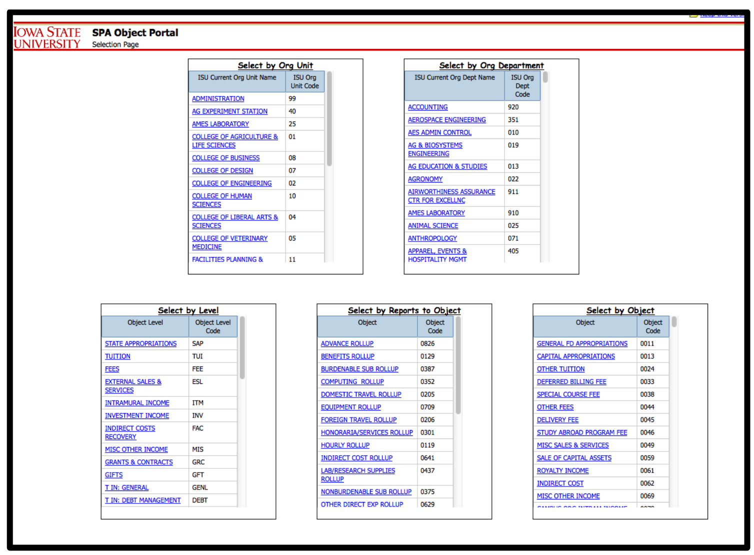
4. Click **Financial** on the blue homepage to enter the **Financial Report Portal**.

Quick Reference Guide: Generating SPA Object Reports

5. Click **Here** for **SPA Object Reports** on the **SPA Summary** graph.



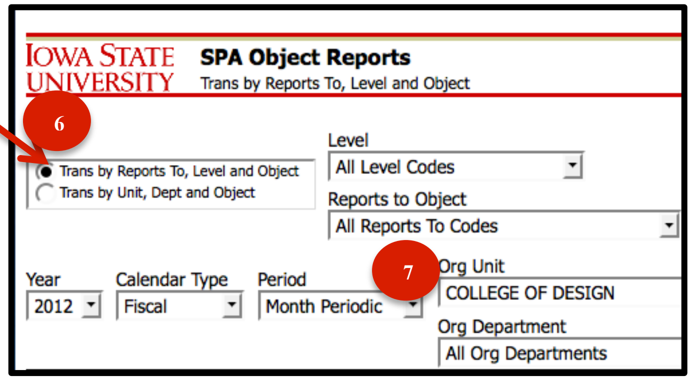
6. Click one of the **underlined blue links** in the boxes (Select by Org Unit, Org Department, Level, Report To Object, or Object) on the **Selection Page** to enter the **SPA Object Reports** page.



Quick Reference Guide: Generating SPA Object Reports

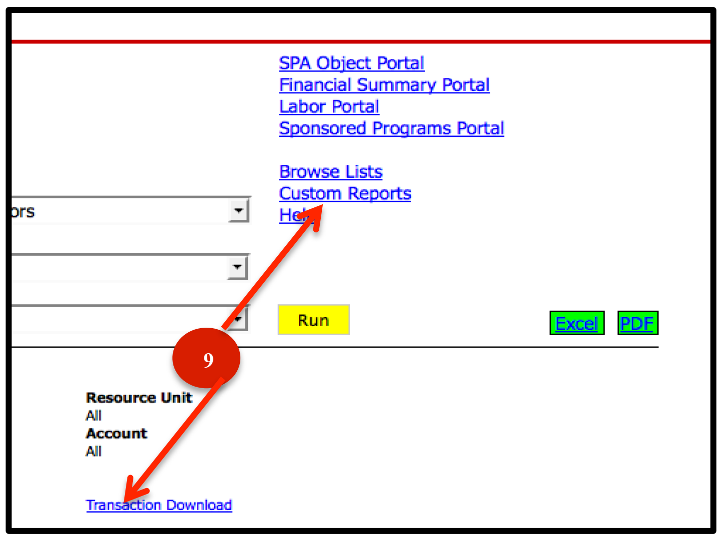
7. Select one **Report Title** from the **Report List** in the top left corner of the screen.

8. Select one or more **Report Filters** from the dropdown menus.



9. Click the yellow **Run** button to produce a report.

10. Click one of the other underlined **blue links** to view detailed information or link to other portals.

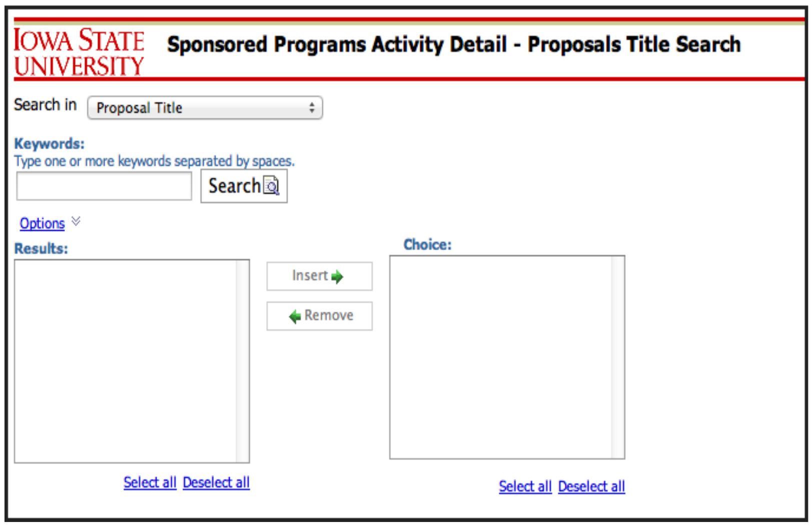


eData Faculty Guide: Proposal Searches (by Program or Title)

Through eData, Investigators are able to search existing proposal or program titles to enable collaborative research on campus with other investigators and departments/colleges, as well as partner institutions. Follow these steps to search proposals by program or title:

1. Log into **Access Plus**, Click **UBusiness**, then **eData.**
2. Click **Sponsored Programs.** **Reporting** on the blue home screen.
3. Click **Here** for Activity Detail Reports.
4. Click **Here** to Search for Proposals by Title or Program.
5. Change the **Search In** selection.
6. Enter your search criteria and click **Search**.

   TIP: If only a few results were returned, click Options to further define your Search.



7. **Highlight** your result and click **Insert**.
8. Click the green **Select** button when your selections are in the choice list.
9. Click the yellow **Run** button (this will only appear after clicking **Select**).

You can now generate reports based on your selection. If you would like to generate reports on data other than your selection, return to the **Activity Detail - Proposal Portal Selection Page** by closing your current tab.

eData Faculty Guide: Proposal Reports by Investigator

eData **Sponsored Programs Reporting** has many portals with information associated with proposals that were submitted through the GoldSheet and awards. The **Proposal Reports by Investigator** portal is updated daily to find to any proposal information submitted through the Goldsheet after July 1, 2010, pending proposals, proposed investigator contribution, and summary of proposal activity for the fiscal year.

Navigation: How to get there

Follow these steps to generate **Proposal Reports by Investigator** Reports.

1. Log into **Access Plus**, Click **UBusiness**, then **eData.**
2. Click **Sponsored Programs Reporting** on the blue home screen.
3. Choose an **Investigator's name** from the drop down menu, under the heading "**Investigator Detail Reports**".
4. Click **Here** for Investigator Detail Reports, after the page refreshes.
5. Select **Here** for **Proposal Reports by Investigator**.

Proposals by Investigator

Role	Proposal Status	Proposal Number	Proposal Amount
PI	Funded	9	$436,000
	Pending	7	$11,820,427
	Rejected	1	$20,000
COI	Funded	7	$532,998
	Pending	1	$473,218
	Rejected	3	$1,588,424
Total		28	$14,871,067

Click Here for Proposal Reports by Investigator

Proposals submitted prior to July 1, 2010 can be found in legacy (InfoMaker) reports.

TIP: For more detailed information, go to [Quick Reference Guide: Generating Proposal Reports by Investigator.]

All Proposals

Description: This report generates a list of proposals by investigator including administrative information (proposal title, number, status, start and end dates, Investigator's role, etc.) and proposed financial information (proposal amounts, counts, direct, and indirect cost).

Pending Proposals

Description: A report to view proposals that are pending approval. Note: To update this information, please speak to OSPA (http://ospa.iastate.edu).

Investigator Contribution

Description: This report shows the proposed investigator contribution and amount or select "Show All Investigators" to view all proposed investigators on the proposal.

eData Faculty Guide: Proposal Reports by Investigator

Summary by Fiscal Year

Description: This report shows a summary of indirect, direct, and total proposal amount by fiscal year. The role of the investigator is included in the report.

For a full description of the Proposals By Investigator Portal, please go to Report Help: Proposal Reports by Investigator.

eData Faculty Guide: Award Reports by Investigator

eData **Sponsored Programs Reporting** has many portals with information associated with awards as well as proposals that were submitted through the GoldSheet process. The **Award Reports by Investigator** portal is updated daily and will be helpful to any sponsored program awarded after July 1, 2010, current awards, investigator contribution, a summary of award activity for the fiscal year, and a list of all accounts associated with that investigator.

Navigation: How to get there

Follow these steps to generate **Award Reports by Investigator** Reports.

1. Log into **Access Plus**, Click **UBusiness**, then **eData.**
2. Click **Sponsored Programs Reporting** on the blue home screen.
3. Choose an **Investigator's name** from the drop down menu, under the heading "**Investigator Detail Reports**".
4. Click **Here** for Investigator Detail Reports, after the page refreshes.
5. Select **Here** for **Award Reports by Investigator**.

Awards by Investigator

Role	Award Status	Award Count	Award Amount
PI	Active	4	$541,000
COI	Active	2	$113,000
Total		6	$654,000

Click Here for Award Reports by Investigator

TIP: For more detailed information, go to Quick Reference Guide: Generating Award Reports by Investigator.

All Awards

Description: This report generates a list of awards by investigator including award amounts, indirect and direct costs, and counts.

Current Awards

Description: A report to view current awards for the selected investigator, sorted by award number (assigned by Kuali Coeus). The report provides details such as the award count, direct and indirect cost summary, and award total.

eData Faculty Guide: Award Reports by Investigator

Investigator Contribution

Description: This report shows the awarded investigator contribution and amount or select "Show All Investigators" to view all investigators on the award.

Summary by Fiscal Year

Description: A report viewing a summary of indirect and direct cost, and total award amount by fiscal year. The role of the investigator is included in the report.
Note: *For this report, Incremental Award Count is the number of actions that can be attributed to a particular investigator in a specific fiscal year for a specific role (PI or COI). Awards can have multiple actions during their life span, including additional monies, extensions of time, or reductions of funding.*

Acct Mngmnt Summary

Description: This report shows a summary of indirect, direct, and total award amount by fiscal year. The role of the investigator is included in the report. The underlined blue account numbers link to the **SPA Financial Report.**

For a full description of the Proposals By Investigator Portal, please go to Report Help: Award Reports by Investigator.