Quick Reference Guide: Generating Award Reports by Investigator

Instructions: Use the steps below to generate Award Reports by Investigator from the Sponsored Programs Register Portal in eData. For more information about reports in eData, refer to the Understanding the eData Interface Job Aid.

Award Reports by Investigator include:

<table>
<thead>
<tr>
<th>Report Type (Radio Buttons)</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>All Awards</td>
<td>This report generates a list of awards based on the filter selection and provides aggregate information such as award count, amount, direct and indirect costs. Shows Principal Investigators only.</td>
</tr>
<tr>
<td>Current Awards</td>
<td>This report generates a list of active awards by award number (assigned by Kuali Coeus) and based on filter selection. It also provides information such as the award count, amount, direct and indirect costs.</td>
</tr>
<tr>
<td>Investigator Contribution</td>
<td>This report shows all investigators on the award and their contributions and percentage amounts for the award.</td>
</tr>
</tbody>
</table>
| Summary by Fiscal Year      | This report generates a list of awards by Investigator, then by Fiscal Year, then by Role. It also provides Investigator, Fiscal Year, Role, Incremental Award Count, Investigator Amount, Direct Amount, Indirect Amount, and Award Amount.  

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         | This report displays the list of accounts and account number assigned to a particular investigator (account manager).  

Note: For more detailed information, use the account number blue links to navigate to SPA Financial reports. |

<table>
<thead>
<tr>
<th>Award Number Link</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Award Number link to Award Detail</td>
<td>Provides details of a specific award in one location. If the award is connected to a proposal, the specific proposal number will be an underlined blue link that takes you to the Proposal Detail report. Additionally, if an associated account(s) is listed, clicking on the account number’s blue link will take you to the SPA Financial report for that account.</td>
</tr>
</tbody>
</table>

Note: As a Principal Investigator (PI), you can view account numbers and balances associated for your award using the Financial Reports sub-portal on the Sponsored Programs Register portal page. Refer to View SPA Financial Reports instructions at the end of this document.
Quick Reference Guide: Generating Award Reports by Investigator

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

2. Click the uBusiness tab.

3. Click eData, then Continue.

4. Click Sponsored Programs on the blue homepage to enter the Sponsored Programs Register Portal.

5. Choose the Investigator’s name from the drop down menu on the Sponsored Programs Register Portal screen.

6. Click Here to enter the Investigator Detail Reports portal.

Note: This link will appear only after you select an Investigator’s name.
Quick Reference Guide: Generating Award Reports by Investigator

7. Click Here on the Awards by Investigator graph.

8. Select one Report Title from the Report List in the top left corner of the Sponsored Programs Investigator Details screen.

9. Select one or more Report Filters from the dropdown menus.

10. Click the yellow Run button to produce a report.

11. Click the Excel or PDF buttons to view, download, or print reports.
Quick Reference Guide: Generating Award Reports by Investigator

View SPA Financial Reports
Use the steps below to view Financial Repots from the Sponsored Programs portal:

1. Enter in your account number in the Financial Reports field.
2. Click Select then Run.

*Note:* The Run link will appear only after you enter an account number and click Select.

On the Sponsored Programs Financial Reports page, the SPA Financial Report for your selected account will appear in the Account field.

To view reports for all of your award accounts:

3. Change the Principal Investigator filter to your name.
4. Select the Account Listing radio button then click Run.

To view an individual account:

5. Choose the account number from the Account drop down list then click Run.

*Note:* The generated list may *not* be all-inclusive since it will show accounts that have had activity in FY14 only.