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:

Report Type (Radio Buttons)	Description
All Awards	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.
Current Awards	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.
Investigator Contribution	This report shows all investigators on the award and their contributions and percentage amounts for the award.
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.

| Award Number Link	Description
Award Number link to Award Detail	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.

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.

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

2. Click the **uBusiness** tab

3. Click **eData,** then **Continue**.
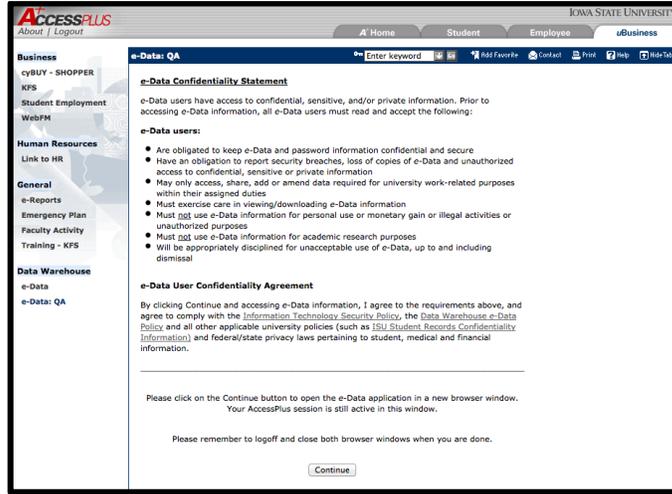
4. Click **Sponsored Programs** on the blue homepage to enter the **Sponsored Programs Register Portal**.
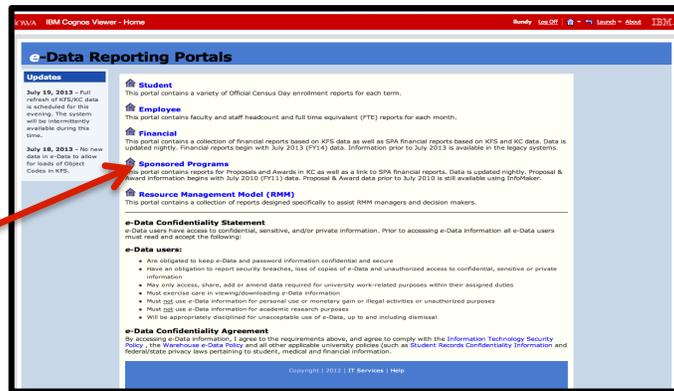
5. Choose the Investigator's name from the drop down menu on the **Sponsored Programs Register Portal** screen.

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

Note: This link will appear only after you select an Investigator's name.
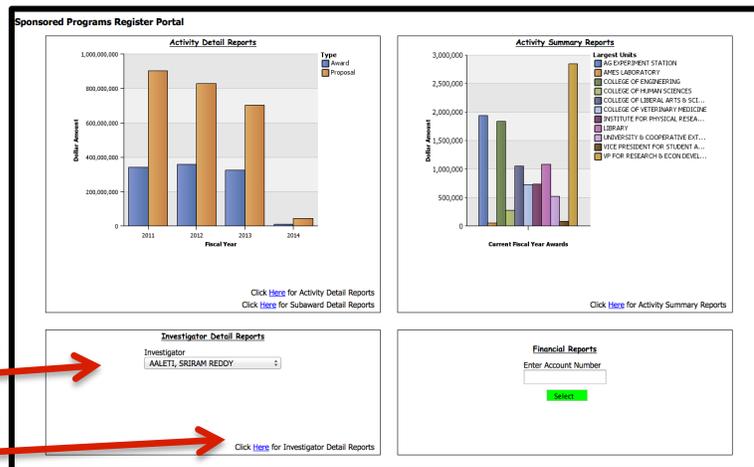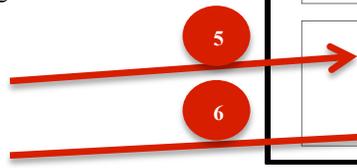
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7. Click **Here** on the **Awards by Investigator** graph.

Awards by Investigator

Role	Award Status	Award Count	Award Amount
COI	Active	1	$99,858
Total		1	$99,858

Click Here for Award Reports by Investigator

8. Select <u>one</u> **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.

IOWA STATE UNIVERSITY **Sponsored Programs Investigator Detail - Award Reports**
All Awards

- ● All Awards
- ○ Current Awards
- ○ Investigator Contribution
- ○ Summary by Fiscal Year
- ○ Acct Mngmnt Summary

Sponsor Type
All Sponsor Types

Sponsor Name
All Sponsors

Investigator
AALETI, SRIRAM REDDY

Activity Type
All Activity Types

8

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

11. Click the **Excel** or **PDF** buttons to view, download, or print reports.
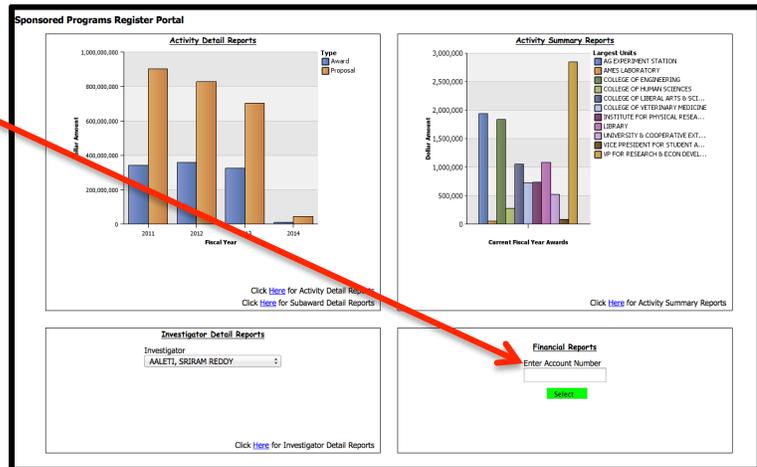
Run   Excel PDF

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View SPA Financial Reports
Use the steps below to view Finanical 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 <u>all</u> 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**.
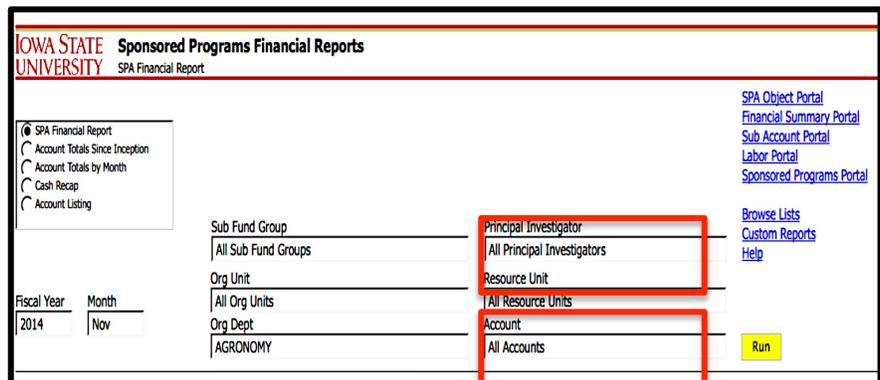
Note: The generated list may <u>not</u> be all-inclusive since it will show accounts that have had activity in FY14 only.