

Reporting Help: Generating Proposal Reports

Purpose: This reference guide lists and explains each report available in the eData Sponsored Programs **Proposal Report Portal**. For step-by-step instructions for creating **Proposal Reports**, please refer to the **Quick Reference Guide: Generating Proposal Reports**. In this guide, you will find:

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Available Reports

This table displays the available **Proposal Reports**, any legacy equivalent, and expected data results. These reports can be customized by any of the filters described in the next section. Listing of the legacy equivalent is not inclusive as there are many InfoMaker reports in the community and many variations on a report.

Report Type (Radio Buttons)	Legacy Equivalent	Expected Data Results
Proposal Report	Single PI Proposal History (for PI's only), Proposals Submitted	This report generates a list of proposals based on the filter selection and provides aggregate information such as proposal amounts, counts, and proposed indirect and direct cost. Shows Principal Investigators only.
Investigator Org Unit	Department's proposals (when dept is listed on the Goldsheet as the Investigator's home)	This reports sorts information by Investigator Org Unit and Investigator Org Dept. The filters labeled Org Unit and Org Dept will filter the Investigator Org Unit and Investigator Org Dept fields (as opposed to the other reports where those filters are applied to Lead Org Unit and Lead Org Dept fields). <i>Note:</i> Since an investigator can list a department and a center on page 2 of the GoldSheet, it is possible for the proposal to be listed twice on this list.
Lead Org Unit	Department's proposals (when dept is listed on the Goldsheet as the administering unit)	This report displays the list of proposals based on filters selected and by lead org unit and department listed on the Goldsheet. The report includes PIs and COIs.
Sponsor Report	N/A	This report sorts proposals by primary sponsor and lists PIs only. Also allows you to view information by "Report Type" where you can "View Flow Through Only" or "View Flow Through and Sponsor".

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Report Type (Radio Buttons)	Legacy Equivalent	Expected Data Results
Graphs by Count	N/A	This report allows you to view proposals by pie chart and table with corresponding amounts based on the total counts to be generated. Also allows you to view graph by Sponsor Type, Activity Type, Proposal Status and Lead Org Unit. An export to Excel will export the pie chart and the table but not the Total line. After exporting the data, you can create a Total line in Excel using the SUM function.
Graphs by Dollars	N/A	This report allows you to view proposals by pie chart and table with corresponding amounts based on the total dollars to be generated. Also allows you to view graph by Sponsor Type, Activity Type, Proposal Status and Lead Org Unit.

Filter Descriptions

Filters are available for each report in the **Proposal Portal**. The filters produce custom-made reports for specific business purposes. This table lists the available filters and describes their function and best use.

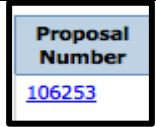
Note: To update data results, be sure to click the yellow **Run** button each time a filter is changed. Check your new data results, which include your newly selected filters. Drop down filters located in the report results area do not require the use of the **Run** button.

Filter Title	Description
Org Unit	Used to filter by the Org Unit assigned to the award (formerly known as part of the Admin DICE). This is the unit at the college and VP level. For instance, College of Design, Ames Lab, VP for Research & Econ Development are options available here.
Org Dept	Used to filter by the Org Dept assigned to the award (formerly known as the Admin DICE). This is the department, institute, center, or extension division. For instance, INTRANS, Biotechnology, and Aerospace Engineering are options available here.
Investigators	Used to filter by Investigators assigned to the award. Listed by Last Name, First Name, and Middle Initial (optional).
Sponsor Type	Used to filter by commodity, local, state, and federal government, foreign, Higher Ed, non-profit orgs, industry, foundation, and other sponsors. This list is not all inconclusive.
Sponsor Name	Used to filter by Sponsor Name. Listed by Business Name.
Activity Type	Used to filter by type including: Instruction, Operations & Maintenance, Public Service, Research, or Scholarships & Fellowships.
Proposal Status	Used to filter by Funded, Hold, Rejected, Pending, or Withdrawn.
Proposal Type	Used to filter between New, Continuation, Renewal, and Supplement Proposal Types.
Submit Date Between	Allows the user to enter a date range for the date the proposal was submitted using calendar option filters.

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Proposal Details and Link

In the results table of the **Proposal Reports**, the Proposal Number is displayed as an underlined blue link. This table describes and illustrates the expected results when you click that link.

Proposal Number Link	Expected Data Results	
Proposal Number link to Proposal Detail	This link takes you to the Proposal Detail screen displaying summary information such as rcommitted totals, requested start and end dates, proposed direct costs, proposal status and awards. If there is an award, a link will appear in the Award section of the Proposal Detail report.	

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 explains the term, 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.	
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 in a static format.	