

## Reporting Help: Generating Proposal Reports by Investigator

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

Available Reports .....	1
Filter Descriptions .....	2
Proposal Details and Link.....	2
Export Options.....	3

### Available Reports

This table displays the available **Proposal Reports by Investigator** and a description of the expected data results. These reports can be customized by any of the filters described in the next section.

Report Type (Radio Buttons)	Expected Data Results
All Proposals	This report generates a list of proposals based on the filter selection and provides aggregate information such as proposal amounts, counts, and indirect and direct costs. It also shows proposal title, number, status, start and end dates, and Investigator’s name and role.
Pending Proposals	This report allows you to view proposals by those pending approval and by proposal (also called GoldSheet number). The “Sort By” drop down filter allows user to look up proposal numbers or amounts. Also offers sponsor information, proposed direct and indirect cost, and proposed start and end dates.  <i>Note:</i> Only the PI is listed on this report.
Investigator Contribution	This report shows all investigators on the proposal and their intended contributions and percentage amounts for the proposal.
Summary By Fiscal Year	This report shows a summary of indirect, direct, and total proposal amounts by fiscal year. The role of the investigator is also included in this report.

## Reporting Help: Generating Proposal Reports by Investigator

### Filter Descriptions

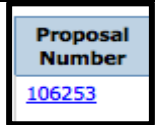
Filters are available for each report in the **Proposal Reports by Investigator Portal**. The filters produce custom-made reports for specific business purposes. This table lists the available filters and describes their function and best use.

**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
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 inconclusive.
Sponsor Name	Use this filter to select proposals by Sponsor Name. Listed by Business Name.
Investigators	Use this filter to choose an Investigator assigned to the award. Listed by Last Name, First Name, and Middle Initial (optional).
Activity Type	Used to filter by type including: Instruction, Operations & Maintenance, Public Service, Research, or Scholarships & Fellowships.
Proposal Type	Used to filter between New, Continuation, Renewal, and Supplement Proposal Types.

### Proposal Details and Link



In the results table of the **Investigator Reports**, the Proposal Number is displayed as an underlined blue link. This table describes 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 <b>Proposal Detail</b> screen displaying summary information such as recommitted 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 <b>Proposal Detail</b> report.	

## Reporting Help: Generating Proposal Reports by Investigator

### 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.	

---