

## Reporting Help: Generating Proposal Status Tracking Reports

**Purpose:** Proposal Status Tracking Reports display details about the proposal and award (if funded) and can be viewed by Investigator or by Lead Org Unit. This reference guide lists and explains each report available in the eData Sponsored Programs **Proposal Status Tracking Report Portal**. For step-by-step instructions for creating **Proposal Status Tracking Reports**, please refer to the **Quick Reference Guide: Generating Proposal Status Tracking Reports**. In this guide, you will find:

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### Available Reports

This table displays the available **Proposal Status Tracking Reports** and expected data results. These reports can be customized by any of the filters described in the next section. Since an investigator can list a department and a center on page 2 of the Goldsheet, it is possible for the proposal to have multiple listings in eData.

Report Type (Radio Buttons)	Legacy Equivalent	Expected Data Results
Report by Investigator	N/A	This report generates a list of proposals based on the filter selection and provides information by Investigator, the Investigator Org Unit and Dept, Lead Org Unit and Dept, and proposal status and other details. A direct link to the proposal and award (if funded) is also available in this report.
Report by Lead Org	N/A	This report generates a list of proposals based on the filter selection, provides information by Lead Org Unit and Dept, and offers proposal status and other details. A direct link to the proposal and award (if funded) is also available in this report.

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### Filter Descriptions

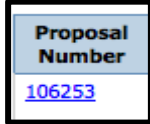
Filters are available for each report in the **Proposal Status Tracking Portal**. The filters produce custom-made reports for specific business purposes. This table lists the available filters and describes their function and best use.

**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
Investigator Org Unit	Used to filter by the Org Unit assigned to the proposal/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.
Investigator Org Dept	Used to filter by the Org Dept assigned to the proposal/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.
Investigator	Used to filter by Investigators assigned to the proposal and/or award. Listed by Last Name, First Name, and Middle Initial (optional).
Lead Org Unit	Used to filter proposal/award information by the lead research program or resource unit of the lead investigator.
Lead Org Dept	Used to filter proposal/award information by the lead investigator' department.
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.
Proposal Status	Used to filter by Funded, Hold, Rejected, Pending, or Withdrawn.

### Proposal Details and Link



In the results table of the **Proposal Status Tracking 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 <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.	

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### 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.	

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