eData Faculty Guide: Generating SPA Financial Reports

Instructions: Use the following steps to generate and view SPA Financial Reports:

1. Log into AccessPlus and enter your University ID and Password.
2. Click the uBusiness tab on the far right.
3. Click eData under the Data Warehouse heading.
4. Click Continue to agree to the eData Confidentiality Statement.
5. Click Sponsored Programs on the blue homepage.
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6. Type in an Account Number with no dashes or spaces in the Financial Reports field.

7. Click Select then the yellow Run button when it appears.
8. View your **Sponsored Programs Financial Reports** for the account you entered.

The **top portion** of the screen allows you to generate a report:

- Change **Report Titles**
- Filter by **Sub Fund, Org Unit, Org Dept, Principal Investigator, Resource Unit, and Account**
- Click the underlined **blue links** to view other reports without exiting
- Click the yellow **Run** button each time you make a change in the filters or report titles
- Click the **Excel** or **PDF** buttons to export and view the report

The **bottom area** of the screen displays the actual report:

- View direct and indirect costs, expenditures, encumbrances, and final balance
- Click the **Account Overview** blue link to get a **Financial Summary** or snapshot of the Account
- Click the underlined **blue links** to view Transaction Details, Encumbrance Details, and more

9. Click the ‘x’ on the tab or window to close a screen or navigate back and forth. Avoid using back arrows to go back a page.