Sponsored Programs
Reporting Manual

e-Data WAREHOUSE, Available thru AccessPlus
Sponsored Programs Reporting Manual for e-Data

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Introduction
This manual is a guide to the Sponsored Programs screens found in e-Data, ISU’s data warehouse available through AccessPlus. Each award represents external funds awarded to ISU as contracts, grants, and cooperative agreements.

Because of the various requirements associated with sponsored funding, the format of this system is designed to assist departments, colleges, and research units in the administration and monitoring of their awards.

All general information, i.e. sponsor names, award period, budgets, etc. are input based on information in the award documents. Personnel addresses and financial information are derived from databases maintained by Human Resources and the Controller’s Department.

Award Reports include:

<table>
<thead>
<tr>
<th>Report Type (Radio Buttons)</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Award Report</td>
<td>This report generates a list of awards based on the filter selection and provides aggregate information such as total cost, counts, and indirect and direct cost. Shows activity by Award Register Date and Principal Investigators only. Also provides Award Count, Award Total, Total Direct Cost, and Total Indirect Cost summary information. Money may come in at different times during the life of an award.</td>
</tr>
<tr>
<td>Investigator Org Unit</td>
<td>This report provides award count summary information by investigator org unit. Since an investigator can list a department and a center on page 2 of the GoldSheet, it is possible for an award to show up twice on this list.</td>
</tr>
<tr>
<td>Lead Org Unit</td>
<td>This report displays the list of awards by the Lead Org Unit listed on the GoldSheet, including the PI and COI Org Unit and Dept. Also provides Award Amounts, Direct Cost and Indirect Cost information per award, and award numbers that link to details.</td>
</tr>
<tr>
<td>Sponsor Report</td>
<td>This report allows you to view sponsor by name and type. To distinguish awards from sub-awards, the Report Type drop down in the report area allows you to “View Flow Through Only” or “View Flow Through and Sponsors” to report information about the Prime Sponsor (primary source of funds) and Sponsor (secondary source of funds).</td>
</tr>
<tr>
<td>IDC/DC Ratio</td>
<td>This report provides a simplified (non-modified) ratio in a summary format of indirect cost, direct costs, and award amounts. Also allows you to view awards by “Report Type”.</td>
</tr>
<tr>
<td>Graphs by Count</td>
<td>This report allows you to view awards by pie chart and table with corresponding amounts based on the total counts generated. Sort by Sponsor Type, Award Count, and Award Amount.</td>
</tr>
<tr>
<td>Graphs by Dollars</td>
<td>This report allows you to view awards by pie chart and table with corresponding amounts based on the total counts generated by Sponsor Type, Award Count, and Award Amount.</td>
</tr>
</tbody>
</table>
Links within the Proposal Report Data include:

<table>
<thead>
<tr>
<th>Award Number Link</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Award Number link to Award Detail</td>
<td>This link takes you to the Award Detail screen displaying summary information such as start dates, direct costs, etc. If the award is connected to a proposal, links to the Proposal Detail report are also available on this detail screen. Additionally, if an associated account(s) is listed, an account link will also be available.</td>
</tr>
</tbody>
</table>

How to Generate Sponsored Program Reports:

1. Log into AccessPlus and enter your University ID and Password.
2. Click the uBusiness tab
3. Click e-Data, then Continue.
4. Click Sponsored Programs on the blue homepage to enter the Sponsored Programs Register Portal.
5. Click Here on the Activity Detail Reports graph.

6. Click Here for Award Reports on the Awards graph.

7. Select one Report Title from the Report List in the top left corner of the Award Report screen.

8. Select one or more Report Filters from the dropdown menus.
9. Select the correct date range using the Award Register Date between filter. Register dates must be the first day of a month and the last day of the same or different month.

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

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

12. Click one of the other underlined blue links to view detailed information or link to other portals.

Report Descriptions
The following pages describe each report (represented by the radio buttons). The proposal and award reports have the same radio buttons and the reports are very similar. In order to reduce replication, only the award reports are described below. You can assume that the proposal descriptions are the same with the exception that proposals have a submit date rather than a register date.
Award Report

The Award Report screen shows information regarding each award. Clicking on the award number drills to another report showing more detailed information about the award. Clicking on the account number drills through to the SPA Financial Report.

Note the register date. This date represents each time the award receives money from the sponsor. This, however, is not necessarily the total award amount for two reasons. First, the sponsor may choose to split the award into several payments thus each register date reflects one of those payments. Second, the database only contains register dates from July 1, 2011 forward. If an award received money prior to July 1, 2011 and has not received money after July 1, 2011 the award will not show on these reports.

Investigator Org Unit

The Investigator Org Unit screen shows information about an award, but it’s grouped by the investigator’s org unit. This allows you to see all awards where the investigator indicated an org unit of Ag Experiment Station grouped together, for example. Note that an investigator can indicate more than one org unit, so an award can be reported more than once.
Lead Org Unit

The Lead Org Unit screen is similar to the investigator org unit report except it’s sorted by the lead org unit. The Lead Org Unit is the unit that is indicated as the unit that is responsible for administration of the award.

Sponsor Report

The Sponsor Report screen shows award information grouped by sponsor.
This report also has a special filter for federal flow through.

And also a filter that allows both to show.
**IDC/DC Ratio**
The IDC/DC Ratio shows award counts and dollars by lead org unit. It also shows the ratio of the indirect amount and direct amount.

**Graphs by Count/Dollars**
The graph screens show award counts and dollars by sponsor type, activity type, award status and lead org unit.
Summary By
The monthly Summary By reports show award dollars for the selected month and fiscal YTD. There are five summary by reports including source, activity, unit, source/activity and award type.
The Summary By reports also have a fiscal trend report type that shows award dollars across years.
Percent of Total

The monthly Percent of Total report shows the ratio of activity type award dollars to total award dollars by month through a given month.

This report also has a fiscal trend report type.
Percent Change

The Percent Change reports show award dollars and ratio either between the current year and the past year or the current year to four years ago. This report groups by activity type or source.

<table>
<thead>
<tr>
<th>Activity Type</th>
<th>2012</th>
<th>2013</th>
<th>2014</th>
<th>2015</th>
<th>Amt Change</th>
<th>Pct Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Academic Support</td>
<td>$4,439,159</td>
<td>$775,195</td>
<td>$916,146</td>
<td>$6</td>
<td>$(4,413,355)</td>
<td>-100.0%</td>
</tr>
<tr>
<td>Institutional Support</td>
<td>$131,049</td>
<td>$231,138</td>
<td>$771,981</td>
<td>$0</td>
<td>$(332,899)</td>
<td>-102.0%</td>
</tr>
<tr>
<td>Operation &amp; Maintenance</td>
<td>$776,178</td>
<td>$1,335,877</td>
<td>$1,983,398</td>
<td>$1,605,006</td>
<td>$702,678</td>
<td>91.2%</td>
</tr>
<tr>
<td>Operations &amp; Maintenance</td>
<td>$1,488,058</td>
<td>$2,968,908</td>
<td>$0</td>
<td>$(1,488,058)</td>
<td>-100.0%</td>
<td></td>
</tr>
<tr>
<td>Public Service</td>
<td>$25,710,590</td>
<td>$11,941,514</td>
<td>$24,530,140</td>
<td>$0</td>
<td>$(24,530,140)</td>
<td>-100.0%</td>
</tr>
<tr>
<td>Research</td>
<td>$160,135,266</td>
<td>$167,248,232</td>
<td>$177,244,626</td>
<td>$110,232,066</td>
<td>$2,112,444</td>
<td>0.6%</td>
</tr>
<tr>
<td>Scholarships &amp; Fellowships</td>
<td>$1,885,838</td>
<td>$790,287</td>
<td>$742,280</td>
<td>$515,590</td>
<td>$340,085</td>
<td>11.1%</td>
</tr>
<tr>
<td>Student Financial Aid</td>
<td>$12,820,317</td>
<td>$11,640,857</td>
<td>$14,077,400</td>
<td>$12,833,452</td>
<td>$12,833,452</td>
<td>1.4%</td>
</tr>
<tr>
<td>Student Services</td>
<td>$111,466</td>
<td>$800,216</td>
<td>$871,141</td>
<td>$899,816</td>
<td>$(84,250)</td>
<td>-9.5%</td>
</tr>
<tr>
<td>Total</td>
<td>$175,050,790</td>
<td>$129,906,895</td>
<td>$130,205,570</td>
<td>$103,117,998</td>
<td>$(32,332,888)</td>
<td>-23.9%</td>
</tr>
</tbody>
</table>
Subaward Detail Report

This report shows information about subawards (awards given out by ISU to other institutions) including the sub recipient (institution where the subaward is going), requisitioner, and subaward amount. This report also drills through to the award detail report. Note that currently this is the only subaward report.
Grantsmanship Report

The Grantsmanship Report begins with the total monthly award transaction amount and then applies the Investigator Contribution percentage from the GoldSheet. Then a further apportionment to the Investigator’s Organizational Unit(s) & Department(s) is applied using the October payroll split from the same fiscal year as the award transaction. Monthly filters of the Grantsmanship Report will utilize this formula following the October payroll each fiscal year. If an investigator has no payroll in October, the GoldSheet org unit/org dept is applied as the pay split. Insignificant differences between the total award amount and summary of total award splits may occur due to rounding.

Investigator Report Descriptions

The following pages describe investigator reports. These reports are intended for the faculty to find and manage their own awards. As before the awards and proposal reports are similar with the same radio buttons. The investigator award reports are described below.
All Awards
The All Awards report is not a register report. All awards associated with the chosen investigator are shown regardless of register activity. This means even if there is no money on the award it will still show up. Awards prior to July 1, 2011 will also show on this report.

Current Awards
The Current Awards report shows all awards with an award status of Active and award type of Grant, Contract, Cooperative Agreement, IPA, SFA Scholarship, and Other.
Investigator Contribution

The Investigator Contribution report is not a register report and shows by award what the chosen investigator’s contribution is as reported on the goldsheet. In the strictest sense, contribution and effort are two different things, however, many people interchange these terms.

This report has the ability to also show the co-investigators on the awards of the chosen principal investigator.
Summary by Fiscal Year
The Summary by Fiscal Year report shows number of awards, number of times money was received (register date), and award amounts by fiscal year and role.

Account Management Summary
The Acct Mngmnt Summary report shows balances for all accounts where the chosen investigator is the account manager.
It also shows the SPA balances for award accounts.