

## e-Data: Tips and Troubleshooting

### Tips


- Title of Portal and Title of Page is always in the upper left corner
- Click Select/Run closest to what you are doing (esp. important in Sub Account portal)
- Click Run if you change anything above the black line, not necessary below the black line
- If information about an account is incorrect, contact Controller's department
- All blue links provide more information
- Page down on bottom left to see entire report. If don't want to page down, can open in PDF or EXCEL to just continuously scroll through entire report
- always go back to main selection page to start a new search
- Filters are constrained by other filters. For instance when org unit LAS is selected, only LAS departments will show in the org dept filter

### Dates and Data

- Fiscal Year 2014 = July 2013 through June 2014
- Fiscal Year 2015 = July 2014 through June 2015
- Pages always default to current month/fiscal year
- Only accounts (RU, Org Units, Org Departments, Objects, etc) with activity will show in the report AND in the account drop down.
- Balance Forwards are considered activity. If user wants a list of all their accounts, then should go to the browse lists.
- Month is not closed until overnight on the 4<sup>rd</sup> working day, so final month balances will appear on the 5<sup>th</sup> working day
- e-Reports will not be available until the 7th, 8th or 9th working day
- Object Portal and SPA Object Portal reports – if you want to see Quarterly YTD you should use the Monthly YTD and select the quarter ending month.
- SPA portal is inception to date
- Transaction Download will appear when more than one account is selected
- Always look at account header
  - Consolidated Accounts = multiple accounts selected
  - Account Overview = one account selected
  - “All – for selected accounts”
  - “All – for selected sub-accounts”

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### Configuration and Error Messages

- Always have browser maximized
- Keep the homepage and graphical summary screen open
- Configure browser to open new pop ups in a new tab
- Using IE with eData:
  - If the user tries to click a reporting portal in IE, but no information is returned or they get a 404 error
  - Get an error “the browser would like to close the window the site is trying to open” (not exact wording)
    - Try again, if still getting 404 error but can get to other websites, have them do the steps in “Using Internet Explorer with eData”
- Timeout/Page has stopped loading
  - Please wait while your report is being generated, but the page is not working
    - Can tell by the reload button showing up: 
  - Refresh the screen or close that tab and go to the previous
- Need to get back to previous screen
  - Close Tab
- Orange Error line will appear (on selection page or within portal) when:
  - Financial – Invalid Account
  - Sub-Account – Account that does not have sub-accounts is entered on selection page, enter a sub-account in the search/account field
  - Labor – Account with no labor transactions is entered
  - SPA Financial – Non-SPA account is entered
- Changed account or search, clicked RUN, previous selection’s data was reported
  - Go to Selection Page, Click Select first, then run for updated data

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### Selection Pages

- Click Select/RUN closest to what you are doing
- Make a Selection
  - Select by Account
    - No dashes
    - No Sub-Account
  - Keyword Search (*if they go in through keyword search and need other accounts, must go back to selection page to find them*)
    - No wildcard
    - Make sure options are appropriate for search
    - Must enter into choice box, then select/run
  - Blue Link
    - Control + F to find keyword
- Sub Account
  - Hold down control to select random sub accounts
  - Hold Down shift to select a chunk of sub accounts
  - To view all sub accounts, enter your account number

### Excel/PDF

- When you open a report in the PDF or Excel – there will be first of list of all accounts included in the report. Scroll to the bottom to see the actual report.
- If open in excel, sub totals and totals are removed
- Some Excel reports have merged cells. Use the unmerge function before editing the spreadsheet.

A list of e-Data Support & Reference Documents is located at  
<http://www.it.iastate.edu/services/edata/support>

Questions, Comments or Concerns? Please let us know!

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