Understanding the e-Data Interface Job Aid

Purpose: This job aid will help you understand the e-Data interface and generate reports from University data. In this job aid, you will learn about:

Where University Data is Stored ................................................................. 1
What Type of Data is Available ................................................................. 2
How e-Data is Structured ........................................................................ 3
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Where University Data is Stored
University data is stored in an online central repository called e-Data. The e-Data warehouse is made up of portals and sub-portals containing current and historical data gathered from a variety of University sources.

e-Data is accessible through the uBusiness tab in AccessPlus under Data Warehouse.

e-Data is used for business purposes only and limited to Iowa State University employees with AccessPlus login credentials.
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What Type of Data is Available

e-Data is separated into five portals, which correspond to five types of data available:

- Student (Enrollment)
- Employee
- Financial
- Sponsored Programs
- Resource Management Model

Updates

The Updates box offers reminders about month-end, announcements, and other important notices about e-Data.

Confidentiality

The e-Data Confidentiality Statement at the bottom of the screen outlines the specific purpose and conditions for e-Data users.

The table below lists and describes the portals available in e-Data:

<table>
<thead>
<tr>
<th>Portals</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Student</td>
<td>This portal contains Official Census Day Student Enrollment reports.</td>
</tr>
<tr>
<td>Employee</td>
<td>This portal contains faculty and staff headcount and full time equivalent (FTE) reports for each month.</td>
</tr>
<tr>
<td>Financial</td>
<td>This portal contains seven sub-portals that provide financial reports based on KFS and KC data. Data is updated nightly. Financial reports begin with July 2013 (FY14) data. Information prior to July 2013 is available in legacy systems.</td>
</tr>
<tr>
<td>Sponsored Programs</td>
<td>This portal contains reports of Proposals and Awards in KC as well as a link to SPA financial reports. Data is updated nightly. Proposal &amp; Award information begins with July 2010 (FY11) data. Proposal &amp; Award data prior to July 2010 is still available using InfoMaker.</td>
</tr>
<tr>
<td>Resource Management Model (RMM)</td>
<td>This portal contains a collection of reports designed specifically to assist RMM managers and decision makers.</td>
</tr>
</tbody>
</table>
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How e-Data is Structured
Behind each **portal** is a graphical display of **sub-portals** that further classify the types of data available:

The **sub-portal** you select will be based on the type of data you would like to view in a report.

For example, the **Residency** sub-portal within the **Student** portal contains university **reports** that provide student residency data.

The maps below illustrate the **portals**, **sub-portals**, and **reports** currently available in e-Data.
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Student (Enrollment) Portal
This map illustrates the **Student Portal**, corresponding sub-portals, and available reports:
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Financial Portal
This map illustrates the **Financial Portal**, corresponding sub-portals, and available reports:
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Sponsored Programs Portal
This map illustrates the Sponsored Programs Portal, corresponding sub-portals and available reports:
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How You Want to View Your Data
Once you enter a sub-portal in e-Data, you can choose how you want to view your data using report and filter options:

Each screen displays a Sub-portal Title and Report Type at the top in bold.

A menu of Reports to choose from is available on the left side of the screen.

Report Filters allow you to further narrow your search to produce report details that meet your specific needs.

To generate a report:
1. Click a Report from the menu.
2. Select your Filters.
3. Click Run.
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What Your Data Results Will Look Like
Data results for your Report can be displayed in table or graph form:

**Headers** in your Report provide a summary of the Report Filters you selected to generate the report.

The **Footer** provides a summary of the data results available in the Report.

**Top, Page up, Page down,** and **Bottom** navigation links provide more information.

**Drill Downs** that appear in your reports allow you to link to Other Reports, Resources, and/or Supporting Documentation.

**Note:** Refer to the section below called **What Other Reports Are Available in e-Data** for a list.

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How to Save or Print Your Data Results
The table below lists and describes the available export options in the e-Data portals:

<table>
<thead>
<tr>
<th>Visual Cue</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Excel" /></td>
<td>Click the Excel button to download the customized report to your desktop. This can be useful to further arrange, modify, or review the data.</td>
</tr>
<tr>
<td><img src="image" alt="PDF" /></td>
<td>Click the PDF button to download the customized report to your desktop as a PDF. This can be helpful when communicating specific report results with others without any change in the data.</td>
</tr>
</tbody>
</table>

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# Understanding the e-Data Interface Job Aid

## What Other Reports Are Available in e-Data

The table below lists and describes other reports available through links and drill downs in e-Data:

<table>
<thead>
<tr>
<th>Report</th>
<th>Portal</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>ISU Fact Book</td>
<td>Student Portal (Dashboard)</td>
<td>Links to the ISU Fact Book prepared by ISU Institutional Research. This electronic book contains profiles and comparisons of student, faculty, and institutional data.</td>
</tr>
<tr>
<td>Registrar Enrollment Statistics</td>
<td></td>
<td>Prepared by the Office of the Registrar, these enrollment reports are released on the 10th academic day of each semester.</td>
</tr>
<tr>
<td>Browse Lists</td>
<td>All Financial Portals: Financial Summary; Sub-Account; Labor; Object; SPA Financial; SPA Object; General Fund Budget</td>
<td>This link goes to the General Browse screen, which offers a drop down lists of reports (i.e. Accounts, Fund Group, Payments, Org Code, etc.) you can generate lists by keyword.</td>
</tr>
<tr>
<td>Custom Reports</td>
<td></td>
<td>The Controller’s Department creates these reports for one or more requesting org unit or department for a specific purpose. Some reports are available University Wide.</td>
</tr>
<tr>
<td>Help</td>
<td></td>
<td>Links directly to the Controller’s Department website, where contact information and other support is available.</td>
</tr>
<tr>
<td>Account Overview</td>
<td></td>
<td>This link appears when a specific account from the account filter drop down has been selected. Provides an overview for one account and its associated attributes.</td>
</tr>
<tr>
<td>Transaction Download</td>
<td></td>
<td>This link appears when a specific account from the account filter drop down has been selected. It opens a calendar that prompts users to select days within or across a month and/or fiscal year. Once a calendar selection is made, the report is downloaded directly into an Excel spreadsheet.</td>
</tr>
<tr>
<td>Transaction Detail</td>
<td></td>
<td>This link appears when a specific account from the account filter drop down has been selected. Provides details (i.e. Tran Date, Description, Object, Doc Type, Sub-Accounts, etc.) of the transactions for the selected Account.</td>
</tr>
<tr>
<td>Encumbrance Detail</td>
<td></td>
<td>This link appears when a specific account from the account filter drop down has been selected. Report displaying details about earmarked funds. ISU Encumbrances are Purchase Orders (PO), Payroll Encumbrances (PE), Travel Encumbrances and Telecommunications Encumbrances (TE).</td>
</tr>
<tr>
<td>Pre-Encumbrance Detail</td>
<td></td>
<td>This link appears when a specific account from the account filter drop down has been selected. Summarizes the manually created commitments of unpaid amounts created by the user.</td>
</tr>
<tr>
<td>Intramural Cash Report</td>
<td></td>
<td>This link appears when a specific account with intramural income from the account filter drop down has been selected. Displays intramural revenue for University service providers.</td>
</tr>
<tr>
<td>Budget Browse</td>
<td>SPA Financial</td>
<td>A summary of award budgets that the PI has submitted through the OSPA Budget Form. This option appears below the Transaction Detail link when a specific account number is selected.</td>
</tr>
<tr>
<td>RMM ICR Distribution</td>
<td></td>
<td>Shows the Indirect Cost Recovery (ICR) distribution in percentage.</td>
</tr>
<tr>
<td>EASE Summary</td>
<td></td>
<td>Links to the current Employee Activity Summary of Effort (EASE) report in WebFM.</td>
</tr>
<tr>
<td>Support Forms</td>
<td>Sponsored Programs – Investigator Detail Reports</td>
<td>Links to completed “Current and Pending” or “Just in Time” support forms required by the National Science Foundation (NSF), US Department of Agriculture (USDA), and National Institute of Health (NIH).</td>
</tr>
</tbody>
</table>