

## Using Filters to Generate Reports Job Aid

**Purpose:** The purpose of this job aid is to help you use filters to generate reports in e-Data. Some portals in e-Data share a set of common filters that allow you to produce reports to fit your reporting needs. Other filters are unique to specific portals.

**Note:** Use of the **Run** button is not required for filters displayed in the report area.

In this job aid, you will learn about:

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### Student (Enrollment) Portal Filters

The **Student Portal** contains seven main portals in e-Data:

- College, Departments & Majors
- Race/Ethnicity and Gender
- Residency
- Trends
- Undergraduate
- Graduate
- Professional

The first portal, College, Departments & Majors, is divided into three sub-portals that include:

- All College Reports
- Single College Reports
- Departmental Profile Reports

The table below lists and describes filters common to the Student Portal:

Filter	Portal	Description
All Colleges	Colleges, Departments & Majors; All Colleges	Appears in the report area. Allows user to choose a view headcounts by individual college across student levels (Undergraduate, Graduate, or Professional) or a summarized view across levels.
College	All Portals*	Appears on the top left side of each screen. Allows user to select all colleges or a single college from the drop down menu. Includes Interdisciplinary Studies and Vet Med. <i>*Note:</i> Single College portal does not include an “All Colleges” filter.
Term	All Portals	Appears on the top left side of each screen. Allows user to select a specific term (Fall, Spring, or Summer) with year (i.e. 2013)

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### Financial Report Portal Filters

The **Financial Report Portal** contains seven sub-portals:

- Financial Summary Reports
- Sub-Account Reports
- Object Reports
- Labor Reports
- SPA Financial Reports
- SPA Object Reports
- Budget Reports

The table below (alphabetically) lists and describes filters common to Financial Report Portals:

Filter	Portal	Description
Account	All	This is the 7-digit account number. Use this filter to generate a report for a specific Account. The Transaction Detail report is available when a specific account number is selected.
Fund Group		Used to identify major groups of accounts such as General University Funds. Use this filter to select and view a Fund Group for a specific Resource Unit, Org Unit, Org Department, and/or Account.
Org Department		Previously known as the last three digits of the Org Code. This filter makes it easier to report by Org Departments that exist in multiple Org Units.
Org Unit		Previously known as the first two digits of the Org Code. Use this filter to select an Org Unit.
Resource Unit		Identifies the budget unit as defined under the Resource Management Model (RMM). Use this filter to select information by Resource Unit.
Sub Fund Group		Used to further breakdown Fund Group. Used to identify major groups of accounts such as General University Funds, which are broken down into General University Other and General University Personnel. Use this filter to select and view one or more Sub Fund Groups within a specific Fund Group.
Year, Calendar Type, Period, Month		Displays the data results for a given year, type (calendar, federal, fiscal), and period (Monthly Periodic, Quarterly Periodic, Month YTD and Quarter YTD) or single month.

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The table below lists and describes filters unique to specific Financial Report Portals:

Filter	Portal	Description
Account Supervisor, Fiscal Officer, and Account Manager	Financial Summary; Account List by Role	View a list of accounts by Account Supervisor, Fiscal Officer, or Manager's name. These filters are displayed in the results section of the Account List by Role report.
Sub-Account	Sub-Acct	Sub-Accounts replace section/projects in the legacy system. Use this filter to view information about a Sub-Account assigned to a specific Account. Sub-Account drill downs in the results area link to Transaction Details.
Consolidation	Object and Labor	Use this filter to look at revenue and expense data by consolidated groups, i.e. Tuition and Fees.
Level	Object, Labor, and SPA Object	Allows users to look at revenue and expense data by Level within consolidated groups, i.e. Tuition.
Object Code		Allows users to look at revenue and expense data by Object within the Level and Consolidation, i.e. Resident Tuition. Available check boxes allow you to select and view multiple objects at once.
Employee	Labor	Use this filter to select an employee by name.
Sort by		Displayed in the results section: Depending on the report selected, sort by Account, Employee, RU, or Pay Base, and Job Title.
Job Title		Displayed in the results section: Allows users to view employee job titles. Use of the Run button is not required for this filter.
Fiscal Year	SPA Fin	Allows users to search for Proposals and Awards by fiscal year.
Principal Investigator		Account Manager for a sponsored program or a PI Incentive account. Changes to the PI name on accounts must be requested through OSPA but processed through Sponsored Programs Accounting (SPA) office, which will in turn update the Account Manager field. Please note that before OSPA or SPA can make changes in KC or KFS, sponsors must approve any changes to the PI on a sponsored program award.
Reports to Object	SPA Object	Aggregation of object codes that report to other object codes.
Rev Code		Used in processes and reports to define type of funding.

### Sponsored Programs Register Portal Filters

The **Sponsored Programs Register Portal** contains five main portals, which separate detailed and summarized **Awards** and **Proposal** reports in e-Data:

- Activity Detail Reports
- Sub-Award Detail Reports
- Investigator Detail Reports
- Activity Summary Reports
- Financial Reports (links to SPA Financial Reports portal in e-Data)

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Three of the five portals are divided into sub-portals:

- Activity Detail Reports
  - Proposal Report
  - Proposal Status Tracking Reports
  - Proposal Search
  - Award Reports
  - Award Search
- Investigator Detail Reports
  - Proposal Reports by Investigator
  - Award Reports by Investigator
- Activity Summary Reports
  - Proposal Monthly Reports
  - Proposal Quarterly Reports
  - Award (monthly) Reports

The table below (alphabetically) lists and describes filters common to the Sponsored Programs Register Portals:

Filter	Portal	Description
Activity Type	Activity Detail; Investigator Detail; Activity Summary	Allows user to limit search by activity type including: Academic Support, Institutional Support, Instruction, Operations & Maintenance, Public Service, Research, Scholarships & Fellowship, Student Financial Aid, and Student Services. Also displayed in the results section of Percent of Total reports in Proposal Monthly and Award (monthly) Reports.
Award Status	Activity Detail–Award Reports	Allows user to limit search by status of award, i.e. Active, Closed, Executed, Pending, Final, or Purged from KFS.
(Award) Register Date Between	Activity Detail–Award Reports; Subaward	Allows users to enter a date range to search for Awards or Subawards using calendar option filters.
Award Status	Activity Detail–Award Reports	Allows user to limit search by award status, i.e. Active, Executed, Pending, Purged from KFS, or Withdrawn/Declined.
Award Type	Activity Detail–Award Reports; Investigator Detail–Award Reports by Investigator	Allows user to limit search by award type, i.e. ISU Gift, IPA, Grant, Other, Cooperative Agreement, or Contract Type.
Category	Activity Summary– Proposal Monthly Reports and Award (monthly) Reports	Displayed in the results section of Summary by Source reports only: allows users to limit search by federal or non-federal data.
Graph	Activity Detail–Proposal Reports and Award Reports	Displayed in the results section of the Graph reports only: allows users to view graphs by Sponsor Type, Activity Type, Proposal/Award Status, or Lead Org Unit.

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Filter	Portal	Description
Investigators	Activity Detail; Investigator Detail	Allows user to limit search by Investigator (PI or COI) assigned to the Account. Listed by Last Name, First Name, and Middle Initial (optional). Also displayed on the Investigator Detail Selection page. A filter in the results section of the Investigator Detail–Investigator Contribution report in both Proposals and Awards allows the user to Show Selected Investigators Only or Show All.
Investigator Org Dept	Activity Detail–Proposal Status Tracking Reports	Available under Report by Investigator report: Allows user to limit search by Org Dept to which investigator is assigned.
Investigator Org Unit	Activity Detail–Proposal Status Tracking Reports	Available under Report by Investigator report: allows user to limit search by Org Unit to which investigator is assigned.
Fiscal Year	Activity Summary	Allows users to search for Proposals and Awards by fiscal year.
Fund Group	Investigator Detail– Award Reports by Investigator	Displayed in the results section of Acct Mngmnt Summary report only: allows users to filter details by Fund Group or by Contracts & Grants Only.
Lead Org Dept	Activity Detail–Proposal Status Tracking Reports	Allows users to select by Org Dept in charge.
Lead Org Unit	Activity Detail–Proposal Status Tracking Reports; Activity Summary	Allows users to select by Org Unit in charge.
Month	Activity Summary	List months in the fiscal year (July through June).
Org Unit	Activity Detail	Previously known as the first two digits of the Org Code. Use this filter to select an Org Unit.
Org Dept	Activity Detail	Previously known as the last three digits of the Org Code. This filter makes it easier to report by Org Departments that exist in multiple Org Units.
Percent Spent	Investigator Detail– Award Reports by Investigator	Displayed in the results section of Acct Mngmnt Summary report only: allows users to filter results by percent spent for All Accounts, those Spent 90 – 99.9 % Spent 100%, or Overspent.
Proposal Status	Activity Detail–Proposal Reports	Allows user to limit search by status of proposal, i.e. Funded, Rejected, Pending, or Withdrawn.
(Proposal) Submit Date Between	Activity Detail–Proposal Reports and Proposal Status Tracking Reports; Investigator Detail– Proposal Reports by Investigator	Allows users to enter a date range to search for Proposal details using calendar option filters. Also available in the Proposal Reports by Investigator – Investigator Contribution report.
Proposal Type	Activity Detail–Proposal Reports; Investigator Detail–Proposal Reports by Investigator	Allows user to limit search by proposal type, i.e. New, Continuation, Renewal, and Supplement Proposal Types.
Report Choice	Activity Summary– Award (monthly) Reports	Displayed in the results section of the Percent Change Over 1 Year and Percent Change Over 4 Years reports only: allows user to sort by Source or Activity Type.

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Filter	Portal	Description
Report Type	Activity Detail–Proposal and Award Reports; Activity Summary–Proposal Monthly and Award (monthly)	Displayed in the results section of Activity Detail–Sponsor Reports: users can filter results to View Sponsors (and prime sponsors), View Flow Through Only, View Flow Through and Sponsor, Non Federal Sponsors. View Flow Through and Sponsor offers an Account Number drill down. Available in results section of Awards Reports–IDC/DC Ratio for reports by Lead Org Unit or Sponsor Type. Also displayed in the results section of Proposal Monthly and Award (monthly) Reports offering graph of results by Month or Fiscal Trend.
Requisitioner	Subaward	Allows users to select from a list of individuals requesting the award, usually the investigator.
Sort by	Activity Detail; Investigator Detail; Subaward	Displayed in the results section in several portals: Used to sort by Sponsor Type, Activity Type, Status, Investigator Org Unit, and/or Lead Org Unit
Sort By	Activity Detail–Proposal Reports and Award Reports; Subaward; Investigator Detail–Proposal Reports by Investigator and Award Reports by Investigator	Displayed in the results section of the following reports: <ul style="list-style-type: none"> <li>• Proposal Report (sort by Proposal Number or Proposal Amount)</li> <li>• Award Report (sort by Award Number, Investigator, Sponsor Number, or Awarded Amount)</li> <li>• Sponsor Report (sort by Sponsor Name or Sponsor Type)</li> <li>• All Proposals and Pending Proposals (sort by Proposal Number or Proposal Amount)</li> <li>• All Awards (sort by Award Number, Sponsor Number, or Awarded Amount)</li> <li>• Current Awards (sort by Award Number or End Date)</li> <li>• Subaward (sort by Sub Award Number, Award Number, or Sub Award Amount).</li> </ul>
Sponsor Name	Activity Detail; Investigator Detail; Subaward	Allows user to limit search by Sponsor Name. Listed by Business Name.
Sponsor Type	Activity Detail; Investigator Detail	Allows user to limit search by sponsor type, i.e. commodity, local, state, and federal government, foreign, Higher Ed, non-profit orgs, industry, foundation, and more.
Sub Recipient	Subaward	Allows users select from a list of recipients of subawards.

For more information about e-Data portals and reports, refer to the **Understanding the e-Data Interface Job Aid**.